



Development Coaching for Leaders to Implement Change and Successfully Achieve Engagement.

Professional Services

Client Story

With a desire to refresh, communicate and launch a new vision, this professional services business needed to instigate an extensive change and engagement programme. This would involve the business leaders being united in a shared vision, and inspire their teams of Managers and specialists to serve the business and clients with purpose and passion.

The organisation – Context

This Tax and Business Advisory services organisation had a long history of offering its clients a range of professional services. Whilst clients were content with the quality of service, the senior partners felt that the business lacked clear differentiation, and felt like any other accountancy practice. They wanted the business to 'feel' different for both its people and its clients.

The leaders – Context

The leaders are made up of two groups; Firstly, three managing partners, having bought into the business on the retirement of the founding partners.

Also, key to the leadership, are seven functional heads e.g. Banking & Finance, each with a team of technical specialists located throughout the country in regional based offices.

The challenges – for the organisation and the leaders

The business had grown through acquisition of regional accountancy practices, each time absorbing leadership and staff. Each regional office now had its own individual working practices and methods.

The managing partners wanted to launch a refreshed vision which meant that clients would have a 'one stop shop' experience for all their business and tax needs, but felt that this message was being lost.

Individual agendas of those leading the seven functions was creating an environment of protectionism and limited cooperation.

The tailored facilitation and coaching process.

The first requirement was to ensure that the three partners were aligned with the vision and the values for the business.

This was achieved through careful and considered facilitation.

Following this, the partners were able to clearly articulate the direction for the group and also express the values that they wanted to see others in the business replicate.

Next, it was essential that the seven functional leaders were united in the same vision.

Continued overleaf

E: Rosanna@the-secret-coach.co.uk

T: +44 (0) 7771 792639

W: www.the-secret-coach.co.uk

In order to connect shared vision and values, aligned with that of the three partners, group facilitation was the most appropriate way to achieve this.

During the facilitation, it became clear that there were a number of perceived competing priorities, and it was essential that the whole leadership found a common purpose.

This method of facilitation was repeated across all functions.

It was decided that The Secret Coach would be held on retainer to facilitate the group sessions, and coach the individual leaders during the change and engagement programme.

The facilitation and coaching focus – Defining development priorities

Facilitation sessions uncovered the following priorities;

- i) The managing partners needed to improve communication:**
How they could improve their communication with each other to agree a single unified vision, and how they could communicate this to other leaders and people with consistency.
- ii) The leaders of each function to be united in one vision and represent this to their people:**
How they could represent their functional priorities whilst still being connected to a shared vision, and to have common values in the management of their teams.
- iii) All staff to understanding that their clients are at the heart of the business:**
To authentically position the groups new vision and values relative to the client and their experience.

Following group facilitation, development coaching for each individual leader focused

on how they each balanced their functional demands and priorities, whilst aligning with, and committing, to the collective vision. Sessions involved face to face contact, telephone and email support.

The impact - for the leaders and the organisation

Following the change and engagement programme the managing partners and leadership reported;

- A shared vision for the business that all of the staff are committed to resulting in:
 - A behavioural framework for Leaders and Staff that's transparent and understood.
- A significant improvement in client satisfaction.
 - An increase in 'highly satisfied' survey responses by 29%
 - An increase in client referrals by 11%
- Improved staff engagement with suggestions and new ideas coming from all parts of the business.
- A leadership team united:
 - Sharing information
 - Discussing and agreeing strategy
 - Communicating with consistency to their teams

The partners and the leaders were delighted with their collective achievement.

*In the words of one of the managing partners –
"We thought we were on the same page, and in many ways, we were. We are lucky to have so many committed people, yet we had just got lost along the way. I have no doubt that we have saved vast amounts of time and energy in getting help with this. I have a feeling we would still be struggling to get everyone's clear commitment if we had not got outside help".*

*In the words of one functional leader –
"The facilitation was useful to get us all on the same page and gave me the chance to see what unites us. I especially valued my individual coaching sessions, which gave me the space to work through things that*



were limiting my success and that of my team. I gained insight that will stand me in good stead for the rest of my career"

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