

TURNING MANAGERS INTO COACHES

Australasian case studies

The case studies contained in this document are from a selection of projects delivered by Results Coaching Systems in Australia and New Zealand between 2002 and 2004.

These projects involve a range of different strategies and objectives, the common theme being the desire to bring coaching into the organizations' culture.

Included are overviews of the initiative, as well as feedback from the coaches and in some cases the people being coached. The companies listed include:

- QBE Insurance
- AMP New Zealand
- Centrelink
- A large consulting company
- Air New Zealand

For further information on these initiatives or to discuss your interest in this area please contact Susan Levinson at SusanLevinson@ResultsCoaches.com, 732-494-4494.

WORKPLACE COACH TRAINING CASE STUDIES

QBE Insurance: Initiative overview

Date started training: Three programs between March 2003 and February 2004

Specific strategies the initiative was designed to address: To provide managers with tools for communicating in a way that gets results, as well as giving them structures for making change happen more easily.

Number of participants: Three programs of 15 managers

Structure of the training: 3 days live with weekly training calls spread over 8 weeks; formal assessment on completion

Number of coachees: Coaches work with between 1 and 3 coachees internally.

Process for matching the coaches and coachees internally: Coachees volunteer themselves for coaching and approach available coaches internally. Coaching in two business goals and one optional personal goal.

Feedback:

"I have never been on any training session where the trainers are so motivated and energized in working towards the goal of training us."

"Enormous content and practical application."

"There is a lot more to it than I expected."

"I received more from the weekly phone conference calls than I expected. I think they were needed as this insured follow up that the skills learned in the 3-day program were implemented back in the workplace."

WORKPLACE COACH TRAINING CASE STUDIES

QBE Insurance: Coach feedback

Coach: Team leader in finance department

Coachee: Team member

Goal for the coaching: Competent and confident in all aspects of my work

Background: Department manager worked with a team member for 12 sessions. The staff member was in his early 30's and lacking direction: showing very low self-esteem and quite a few problems with motivation (turning up late; lots of leave taken; tired). The manager had tried many things to address these concerns but with no change. Manager asked the team member whether he wanted to try coaching and they agreed to work together once a week over three months. First action was to write down the things he liked to do and didn't like to do; and the things he was or wasn't good at. The correlation between the things he didn't like and wasn't good at was very clear. So part of the coaching was to address each item individually until he felt competent.

Outcome: The staff member now comes in early every day, has lost 20kg and has booked a trip to Europe: he is one of their most motivated team members. Instead of losing a staff member, the department has an employee looking at training further in the area and taking on more responsibility. Impact on the team is noticeable with others asking whether they can be coached – comments relate to the manager caring about the staff individually and the company prepared to do something about it.

WORKPLACE COACH TRAINING CASE STUDIES

QBE Insurance: Coach feedback

Coach: General Manager

Background: I have been using the coaching skills consciously in my everyday work. What I noticed as a result of being in the coach training program was that I had a very intimidating management style – I started to use to a more interactive style and noticed big changes. All my direct reports are department heads and I noticed the impact on their team members as well.

Outcome: I started putting the onus back on my managers instead of controlling it myself – asking them questions in meetings, letting them take ownership of their decisions. I also started being much clearer in my expectations right down the line. Everyone in the division has noticed and they seem much more in control as they know what is expected of them and they now have the opportunity to come up with their own answers.

WORKPLACE COACH TRAINING CASE STUDIES

AMP New Zealand: Initiative overview

Date training started: May 2003

Specific strategies the initiative was designed to address: To develop people's potential and to identify areas for improvement. Training a group of managers as internal coaches fits well as the vehicle for bringing various initiatives together. We are currently in the middle of a change program that sees us moving toward a more accountable culture and roles having broader discretion. This in turn will see a shift away from numbers based measurement to Team Leaders having to exercise more judgment. Training them as coaches was seen as a way to give them access to these practical skills.

Number of participants: 12 coaches trained.

Structure of the training: 4 days live training followed by 8 telecalls.

Number of coachees: 24 people were coached immediately following the training. Currently about 8 people are being coached formally. One-on-one coaching happens fortnightly and team members have work related goals with their managers where appropriate.

Process for matching the coaches and coachees internally: First time around interested team members nominated 3 coaches with whom they would like to work and they were then matched by an internal coordinator. This time as coaches have become available, people either nominated themselves or are put forward by their manager.

Who is the target for coaching internally?

Team members within the Risk Markets Customer Service team.

WORKPLACE COACH TRAINING CASE STUDIES

AMP New Zealand: coach feedback

It was really exciting to see team members taking control of their development and achieving things that they had previously seen as too hard and not possible. Team members enjoyed having someone was holding them to account and who was on their side helping them to achieve.

The main feedback after the sessions was that it taught them to think in a different way and that they now feel they are a lot more self-aware and in control of what happens to them and the decisions they make.

We have seen how making improvements in their personal lives has a huge impact on their work life and their behaviors both in the workplace and outside the workplace.

Cushla Majendie – Retention and Administration Manager AMP Risk Markets

WORKPLACE COACH TRAINING CASE STUDIES

AMP New Zealand: Coachee feedback

My goal was related to being an employee in the business and was clearly defined as having a business card with the job description of “Test Analyst”.

I was a case manager at the start of the coaching program and had some experience in the area of testing from helping out with various system releases throughout the year. At the time of the program the role of “test analyst” did not exist within the company but I thought that if I could expand my knowledge and experience in this area I would be in a better position to accept the role should it come up.

So the goal was defined and in the subsequent weeks my coach and I went through steps where I could gain knowledge and insights. This involved talking to various key people in the business, others who had worked on test roles before, looking at job descriptions from other companies to see what was expected and general literature on the role.

Around half way through the coaching series, a test analyst role opened up within the Risk Markets Business. I met with my coach about changing my CV and designing an appropriate covering letter. My coach had recently conducted a number of interviews so was in a good position to coach me through the pitfalls involved.

In the end I got the job and the business card! The coaching program certainly helped give me some focus. It provided a clearly set goal and provided me with the means to achieve it and the regular meetings kept me on track.

WORKPLACE COACH TRAINING CASE STUDIES

AMP New Zealand: Coachee feedback

My goal was “To be more in control than I have ever been”. This goal was to be achieved in four steps.

Step One was to understand where I was. I did this by recording everything I did for 48 hours both at work and at home. These activities were categorized as controlled or uncontrolled. From this I found that a lot of activities were being done to me rather than me doing the activity.

Step Two was to understand what I needed to do to be in control. This step was completed by visualizing what it meant to be in control. I also read a Stephen Covey book on Time Management principles.

Step Three was to establish a plan for developing and maintaining control. I completed this step by taking the Covey time management plan and altering it slightly to fit with my goals. I felt sure that if I held fast to the principles I had read about, then I would be able to maintain control in my work and personal life.

Step Four was to put the plan in place. This step was all about implementing my plan and evaluating how it was going.

It's now eight months since I implemented my plan and I still use it on a weekly basis and continue to feel in control of all activities I do each day. I found the workplace coaching program to be extremely empowering. It has made a huge difference especially in my work.

WORKPLACE COACH TRAINING CASE STUDIES

Centrelink: Initiative overview

Date started training: Pilot in November 2002; second program in September 2003.

Specific strategies the initiative was designed to address: To provide a formal internal coaching resource for high potentials and new recruits.

Number of participants: 19 participants in the pilot and 16 in the second program.

Structure of the training: 4 days live with 8 telecalls; formal assessment on completion.

Number of coachees: 35 people being coached formally.

Process for matching the coaches and coachees internally: Coachees are specially selected: high potentials and new recruits who then select their coaches from a pool of internal coaches. Goals are in an existing KPI, a stretch goal and an optional personal goal.

About the coaches:

- The RCS coaching structure is supporting them to become great coaches.
- They are using the skills they have acquired in all areas of the business not just their structured coaching sessions.
- Their communication skills - especially listening - are far more enhanced.

About the coachees:

- Inspired by the commitment coaches have shown to their personal development.
- They are aligned to the goals they have set and believe that accountability is moving them towards these goals at a faster pace than they would have otherwise.
- They are feeling far more valued in the organization.

WORKPLACE COACH TRAINING CASE STUDIES

Centrelink: Coach feedback

Coach: Branch Manager

Coachee: New department manager

Goal for the coaching: To obtain my qualifications as a psychologist

Background: A manager has worked with half a dozen coachees over 12 months. Works with each coachee for one hour a week over 12 sessions.

Coachee is in her early 30's and had completed the academic study component of her psychology degree but not the two years supervised practice. She has had her degree for 6 years and sidetracked by other employment so this had sat with her for some years Goal was to get the ball moving for her to complete her two years of supervised practice.

Outcome: Found the cost to be around \$10,000 per year so needed to find alternatives. The result was a pro bono relationship.

Personal impact: first key point was in the area of building of confidence: from completing something that she had put off for years and seeing it broken down into steps that she knew she could achieve. Learning here was transferable to other areas of her life.

Workplace impact: learned that with any task, if you know what you want to achieve and create a pathway forward you present more confidently and are less likely to be distracted. She transformed from someone who was aspiring to be in the next level of management to someone who was quite prominent in that group.

WORKPLACE COACH TRAINING CASE STUDIES

Centrelink: Coach feedback

Coach: Branch Manager

Coachee: Acting department manager

Goal for the coaching: Being a great operations manager (currently acting in this role)

Background: Coachee was only acting in the role of operations manager and wanted to become permanent in the role. Strategy was to structure and then record a snap shot of where she was in the role, where she wanted to be and how she was going to get there. She then needed to put these things in place (e.g., instigating a performance review process and re-working the structure of meetings).

Outcome: Result is that she has been seen to be driving change in her area (something very rare for something acting in a role) and thereby proved her worth and has been appointed to the role for a longer period of time.

Personal impact of the coaching: Putting structure and direction and substance to something that she knew she wanted to achieve. Coach has seen a huge increase in confidence – this is now opening doors for her as other people are noticing as well.

Workplace impact of the coaching: Her strengths were already there and now she has the confidence to display her worth and is letting people know.

From the coach's perspective: the coaching overall is empowering for both people and emphasizes the value we place on staff. Sends a really powerful message to staff of the value and support we believe they deserve. I now have people knocking on my door to take on a coaching series.

WORKPLACE COACH TRAINING CASE STUDIES

Australasian consulting company: Initiative overview

Date started training: November 2002

Specific strategies the initiative was designed to address: We run a voluntary coaching program twice per year. The purpose is to help our people perform at their best by setting and achieving challenging goals for themselves.

Number of participants: November 2002 with 20 participants and February 2004 with 10 participants.

Structure of the training: First program was run over 2 days and 12 telecalls; second program was run over 3 days and 8 telecalls.

Number of coachees: We currently have a total of 17 coaches and 21 staff in coaching.

Process for matching the coaches and coachees internally: The coaching program runs twice per year following the performance review process, and is used as a developmental option for goal setting in performance reviews.

Coaches work with non-direct reports.

High performers are encouraged to participate as a key retention tool.

WORKPLACE COACH TRAINING CASE STUDIES

Australasian consulting company: Coachee feedback

Coach: Senior Manager

Coachee: Group services consultant

Goal for the coaching: To not be restricted by back pain to do the things I want to do.

Outcomes: Daily pain rating went from an average of 6 to an average of 1. Key insight was that we each have choices over our emotions. Being happy is a choice.

Emotion has an impact on back pain (rather than focusing on negative emotions surrounding pain, focus instead on being happy and back pain decreased).

Coach: Senior Manager

Coachee: Consultant

Goal for the coaching: To feel as in control of my money as when saving for my holiday to Hawaii.

Outcomes: Structured savings plan, weekly budget, strategies to manage "impulse shopping".

Insights: I tend to be easily influenced by others - i.e. do (and buy) things because other people want to/like it, even if I don't; I tend to shop to alleviate a bad mood. I make excuses to justify my spending. I feel a lot more in control now with these strategies in place.

WORKPLACE COACH TRAINING CASE STUDIES

Australasian consulting company: Coachee feedback

Coach: Senior Manager

Coachee: Consultant

Goal for the coaching: To feel as motivated about work as I did when I started.

Outcomes: Feel generally a lot more positive. I've become a lot more aware of myself (e.g., negative self talk, easily distracted, need specific targets/goals to remain focused and feel more motivated). My motivation is impacted by learning and very dependent on recognition / thanks / acknowledgment from others.

I've now learned to take responsibility for this myself and have learned how much I used to use negative self-talk. If I start doing this now, I take myself in front of the mirror and say it out loud - this really helps me realize how ridiculous it is.

I've also learned that I am very hard on myself - don't give myself permission to feel proud of achievements or to feel satisfied with many things.... asking myself the question - "Would you congratulate your best friend if they achieved this?" has really opened my eyes in this regard.

WORKPLACE COACH TRAINING CASE STUDIES

Air New Zealand: Initiative overview

Date started training: March 2003

Specific strategies the initiative was designed to address: Strategy was to deliver coaching to a whole division over time.

Number of participants: 41 participants on pilot program.

Structure of the training: 3 days live with weekly training calls spread over 8 weeks; formal assessment on completion.

Number of coachees: 35 coachees in formal coaching working with 31 coaches.

Process for matching the coaches and coachees internally: Coachees volunteer themselves for coaching and approach available coaches internally. Coaching in two business goals and one optional personal goal.

Feedback:

What's the biggest lesson learned from coaching?

- *"Managerial and leadership skills"*
- *"We are all leaders"*
- *"To be proactive in difficult situations"*
- *"I am good enough to make a difference"*
- *"It is quite easy once you know what you want to achieve"*
- *"To act as well as to think"*
- *"To stay focused on worthy goals"*
- *"Never give up!"*
- *"This is something everyone should do"*

WORKPLACE COACH TRAINING CASE STUDIES

General feedback across all programs:

- *Absolutely stunning. Often when you go on courses you get a lot of waffle theory. This was totally practical and extremely valuable.*
- *Never before have I had a facilitator who was absolutely mind blowing.*
- *Inspiring, motivating & challenging at all times.*
- *Makes me more focused in my communication, am doing a lot more asking rather than telling.*
- *Has been really valuable and the business will really see some strong benefits over time.*
- *I constantly find myself referring back to the course book.*
- *Really enjoying the coaching and finding it fun which is a real bonus, have definitely built stronger relationships with my colleagues.*
- *The dialogue is changing here - how we speak to our people is shifting, there is a lot more listening and engaging with people.*