



Selected Executive Case Studies

March 1, 2011

1. Economic Development: Sales, Professional Communication & Change Agent

Situation Analysis:

- Newly hired Executive Director of Economic Development charged with bringing new industry, businesses and jobs to his Indiana County
- Direct reports disengaged
- Board of Directors comprised of volunteers from local small business community
- County faced unemployment higher than state and national averages and below average educational achievement levels
- Press adversarial, as prior Executive Director left under investigation and scandal

Coaching Solution:

- Individual coaching focusing on stakeholder management, team development and professional branding issues. For example:
 - Creation and daily implementation of professional brand as Director and for the Economic Development Office as a whole
 - Team development – getting the right people in each job
 - Time management and delegation through prioritization and professional pushback/'positive no's'
 - Communication platform for County, press, Board, prospective investors
- Implemented vision/strategy time to align goals and needed changes and retain focus

Results:

- Attracted \$100M in business investment creating 1000 new jobs
- Developed favorable press relationships, increasing positive coverage
- High approval ratings from key stakeholder groups
- Selected by Governor to participate in international recruiting expedition
- Streamlined team and created professional development programs and paths internally

Possible Applications:

- Stakeholder management
- Communication platform to drive sales
- Creation and daily living of an individual professional brand
- Professional Communication skills to deliver "positive no's"
- Vision/strategy time for account management

2. Financial Services Firm: Goal Alignment; Stakeholder Alliances; Professional Branding; Profitable Sales Growth & ROI of Time

Situation Analysis:

- After 20 years with the same firm, a senior leader was hired as VP of Health and Wellness business at rapidly changing financial services firm
- Executive did not wish to relocate and uproot her family. This added complexities of managing remotely and forming/maintaining stakeholder relationships
- Firm privately held with a unique culture and tradition around the “way things done here”
- 40% of external executive hires fail within the first 1.5 years. Enerpace was asked to create an Executive Onboarding program to facilitate her success

Coaching Solution:

- Executive onboarding/individual coaching program focused on goal definition and alignment, stakeholder identification and communication, time management and professional branding. For example:
 - Personal brand created as foundation of communication platform for all introductory meetings
 - Stakeholder identification and contact strategy created to insure this key success vehicle utilized despite hectic daily responsibilities
 - Onboarding/development plan created and formally reviewed with higher management quarterly to ensure goal alignment and resource allocation
 - DiSC and Emotional Intelligence tools utilized to aid communication, especially around conflicting priorities and ROI of time management

Results:

- Successfully on-boarded
 - Promoted within first 12 months, tripling size of direct report team
 - Appointed to visible taskforce on strategic issues
 - Developed key relationships cross functionally with all internal and external stakeholders
- All onboarding and business plan goals achieved, despite working for 3 different bosses in 14 months due to reorganizations
- Sales team actively engaged. Executive client seen as strong value-add in external client meetings and became sought after; responsible for saving several key accounts
- Promoted to SVP in 18 months

Possible Applications:

- Keeping leaders focused and engaged in times of rapid change and growth
- Stakeholder communication, time management and goal alignment tools for client management
- Communication, ROI of time management and stakeholder contact strategy for sales success

3. Logistics Company: Leadership & Communication

Situation Analysis:

- Privately held logistics firm experiencing rapid growth, creating a need to move beyond centralized control and decision making by only the two Founders
- Ineffective leadership team comprised of functional department heads, missing strategic deadlines and deliverables
- Lack of ownership and commitment to the strategic planning process and its tactical implementation

Coaching Solution:

- Individual coaching for President/Co-founder
- Team coaching for leadership team
- Coaching skills for managers taught in 'train the trainer' style to President for use with leadership team

Results:

- Leadership team assumed ownership and delivered timely and effective strategic plans for the first time
- Communication improved enormously at all levels of the organization
- President able to identify and groom COO candidate, while correcting staffing errors in HR and IT leadership positions through more clearly designed Roles & Responsibilities
- Client termed the engagement "invaluable"

Possible Applications:

- Managing leadership challenges caused by rapid growth and change
- Team/project leadership effectiveness
- Enhanced team and organization communication

4. Consulting Practice Director: Career and Life Planning

Situation Analysis:

- High level Executive in danger of being burned out by too much work and travel
- Only the career area of her life receiving focus
- Entire career history comprised of an all-or-nothing lifestyle where she burns out, leaves the corporate world entirely and then re-enters when she's ready for a new challenge
- Company about to reorganize so she hired me to help her create a vision of the type of job she REALLY wants
- Desired a LIFE plan and purpose, as well as one for her career

Coaching Solution:

- Individual coaching program focused on multi-dimensional success and proactive career and life management:
 - Values clarified to ensure only fulfilling options and goals defined
 - Created ideal career vision
 - Explored what she REALLY wanted in other areas of her life; Developed and implemented a plan to address those areas – both short and long term
 - Worked on perspectives and the power of conscious choice throughout the day
 - e.g. doesn't HAVE to be a fire drill before vacation – don't need to be too exhausted to enjoy it by the time you get there
 - Gave voice to the drivers or "gremlins" behind the all or nothing mentality so they could be identified and eliminated

Results:

- She broke the burn-out/sabbatical cycle and is still @ Cerner
- Client able to completely enunciate her desired career path
- This allowed her to be offered and accept a promotion to a higher level Regional Management role within the firm that aligned with her career vision
- Client continues to work on implementing her life plan for multi-dimensional success

Possible Applications:

- Career planning & management
- Life planning & management
- All or nothing thinking vs. conscious choice

5. Senior Vice President : Career Planning & Transition

Situation Analysis:

- Former VP of a top tier Telecom, still reeling from being unceremoniously let go in a recent reorganization
- Didn't want to move her family again after being in her current location only 2 years
- Primary wage earner and VERY cognizant of being in her "prime earning years"
- Always a workaholic and no real network of connections in her area

Coaching Solution:

- Career Transition & Planning Coaching Program
 - Began with values clarification to make sure we defined fulfilling possibilities
 - Brainstormed other career options , as VP jobs are scarce in her city
 - Acknowledged the emotional side of this process & provided resources to normalize what she was going through
 - Developed networking strategy and schedule including a refined resume, elevator speech, etc.
 - Provided accountability to committed timeframes to explore non-traditional options: opportunity with a major non-profit and bid seriously to purchase a company
 - Launched her own consulting business and marketing plan to obtain clients thru speaking engagements
 - When corporate job offer attained, supported decision analysis and compensation package negotiation
- Executive Onboarding Program
 - Designed 90 Day Ramp-up plan
 - Built in self-care items to avoid "being a chump" by giving up her whole life again

Results:

- After 12 months, Client obtained her dream job and higher salary
- Entered prepared with a plan to meet her needs as well as the needs of the business
- She now has a business network of connections that she has committed to staying in touch with regularly

Client's Words:

- "You can't imagine how much you helped keep me sane over the past year!"
- "I like it when you ask the tough questions and push me to say/do things that might not be comfortable."

Possible Applications:

- Fulfilling Career Possibilities
- Networking strategy & schedule
- Timeframes and accountability
- 90 Day Onboarding Plan
- Self- Care plan

6. Executive Vice President: Career Transition Strategy & Execution

Situation Analysis:

- A 20 year Executive with the same firm had been in transition for a year when we met
- He'd been doing some consulting projects found through his network and had just learned of the "position of his dreams"
- Yet cynical after 12 months of searching

Coaching Solution:

- Career Transition & Planning Coaching Program
 - Perspectives clarified to make sure he was chose the most powerful option
 - Fully fleshed out his career vision, definition of success and ideal company characteristics
 - Worked through interview strategies and ways to handle possible objections.
 - Focused on what EMPLOYER cares about and developed a communication platform to address those points
- Identified powerful communication strategies to manage the recruiter as an employee
- Ongoing "Gremlin" management & choice of perspectives
- Kept him in conscious choice about what he'd give up for the job
- Drove him to stay in action on other opportunities and avoid possible disappointment from placing his eggs all in one basket yet again

Results:

- In just one month, Client got his dream job which was upgraded to EVP from VP to accommodate him!
- Happy there for 5 years
- He was a cynic, but now is an Ambassador for Coaching and has referred others to Enerpace

Client's Words:

- "You gave me a different perspective on approaching and managing a job opportunity. As a result, I interacted differently with recruiters and interviewers, prepared differently for the interview, and responded differently with follow-up correspondence. The coaching gave me a new level of confidence and a strong sense of purpose. Shortly after working with Elene, I landed a job, ending 13 months of unemployment. The other very valuable part of the coaching was the homework. It kept me on task (and I know I would have otherwise procrastinated), helped me focus on important issues (instead of busy work), and gave me a sense of accomplishment (instead of excuses)."

Possible Applications:

- Perspective management
- Interview strategies, communication platform & objection handling
- Gremlin management to enable conscious choice

Enerpace Background & Credentials

Our Mission:

Enerpace, Inc. has been providing Executive and Personal Coaching services since 2002. Founded by Elene Cafasso after a 14+ year career as a Corporate Marketing Executive, Enerpace's mission is to help leaders focus on what REALLY matters, while growing themselves, their team and their bottom line.

Our Clients:

Enerpace works with both Individuals and Corporate clients of all sizes - from entrepreneur up through the Fortune 100. Some of our better known clients include:

- ABN Amro/LaSalle (now Bank of America)
- Brown & Brown Insurance
- Cerner Corporation
- CNA Insurance
- Diamond Cluster
- Discover
- EchoStar Communications
- Edward Jones
- Fellowes, Inc.
- FHP (Freudenberg Household Products)
- Fidelity Insurance
- GE
- Honeywell
- Kemper Insurance
- LPL Financial Services
- Lucent
- Midwest Bank
- Motorola
- Nexus Distribution Corp.
- Oracle Corp.
- Paterno Wines
- Pella Windows
- Quaker Oats/ PepsiCo
- Qwest
- RR Donnelly
- Sears
- SBC/AT&T
- Tribune Company

Our Team:

All Enerpace Coaches have real-world business experience – more than 100 years in total! We are all also professionally trained as coaches by The Coaches Training Institute (CTI) and hold professional certification from the International Coach Federation (ICF), the governing body of the coaching profession.

The Enerpace Advantage:

As noted above, Enerpace Coaches have over 100 years of combined corporate business experience that's widely diverse in terms of functional & industry expertise. We are not Human Resources/Organizational Development folks. We have been where our clients are! We have had *real world* P&L and managerial responsibilities.