

# **Process Makes Perfect**

*Lessons in Executive Coaching in Service Organizations*

*Robert DiCalogero*



*Think Big  
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*2006 Case Study Series*

# Process Makes Perfect

## *Lessons in Executive Coaching in Service Organizations*

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Executive Coach*

*This case study describes a real coaching intervention and how to focus on the apparently little or “not so important” things that yield big results.*

### **Joe’s Situation**

The client, whom I will call Joe<sup>i</sup>, works for an organization that provides basic research and training on best practices in business for its members. Membership is based on annual subscription. Joe’s organization runs seminars on the best way to train staff on best practices in providing various services. Also, they gather and distribute information to its members on best practices from research conducted by Joe’s organization. The organization aims to expand its membership by providing high-quality products and continually engaging the membership is a process of dialogue and feedback, informing them of the different products – seminars and training – available and soliciting their input on future research topics. Therefore, continuous and effective contact with members is an essential prerequisite for success.

### **Joe’s Problem**

Joe felt frustrated because his team – the people responsible for maintaining contact with clients – was not working well together. Joe spent too much time facilitating the work of the team instead of focusing on delivering services to members in the field. Moreover, he felt that the large investment in time needed to get his team members up to speed adversely affected his ability to influence senior management to adopt new processes. Joe faced a conundrum, he was not inclined to invest the personal resources needed to improve his process management skills – in this case team building and modeling teamwork – and would rather use his energies to influence senior management to make significant changes in the way the organization conducts its business, specifically in the hiring of personnel to contact members.

### **Executive Coaching**

We established two major goals for coaching:

- Improve Joe’s ability to push through “big ideas” about how the organization should maintain contact with its members, and
- Help Joe upgrade his skills at process management – team building and modeling teamwork – to improve his interactions with members of his team.

Coaching aims to improve individual and group performance as well as solve management and organizational problems. The techniques used in coaching, as contrasted with consulting in which the consultant or expert provides advice, attempt to solicit the views of the coaching client and enable the client to bring forth him/herself the answers to their problem. Given the functioning of the human brain, change in behavior is not easy and our instincts, built up over thousands of years, make recourse to familiar patterns of behavior difficult to overcome. Therefore, the task facing the coach is not only to help the client come up with the answers him/herself through the use of powerful questions, but, once change behavior is affirmed to help the client reinforce that behavior through exercises and accountabilities and follow-ups. As the need to respond and adapt to new opportunities and threats in both business and government has increased, and

individuals desire to take their performance to the next level becomes widespread, the demand for coaching services has expanded in recent years.

### **Joe's Revelations**

In Joe's case, we began with a focus on the second goal, namely improving his interactions with his team as a precursor to influencing senior management. Joe realized that he saw himself as a "big picture" thinker, someone who was most effective as an intellectual leader. Yet his team needed practical help, they were not effective in making and maintaining contacts with members and, therefore, the rapport that he needed established so that he could do his work was missing. Moreover, the dashboard system that was in place to track contacts with members – the metrics used to record the frequency and content of calls made – was broken in that it put too much emphasis on making calls and not enough on maintaining a more personal relationship with members. Not surprisingly, renewals were down.

Through a series of powerful questions aimed at soliciting Joe's views on the practical aspects of contacting clients it became apparent to him that he lacked empathy for his team and the difficulties they faced in maintaining contacts with members. Most were young college graduates with no practical experience in customer relations; the company policy had been to hire people with college degrees rather than those with call center experience.

As a result of our coaching, Joe decided to help his team by coaching them, including setting up a schedule so that calls were made for a set number of hours each day and the emphasis was placed on consistent and steady follow-up, including the use of emails. Joe found that within a short period of time getting involved in the practical aspects of work could be as rewarding as thinking through the big picture. One of his major satisfactions was the ability to initiate a process and see it bear fruit within a short period of time. His team's effectiveness in contacting members improved significantly and increased the credibility of Joe's ideas about reorganizing the entire calling process, including hiring people with call center experience.

### **Joe's Results**

Building upon his success with his team, Joe was able to extend his influence upward and convince senior management to revamp the process for hiring and training staff to do member contacts. Special training programs were introduced and fixed schedules were established for contacting members and following up with emails. Within a year of our coaching engagement, Joe was promoted.

In summary, coaching can address specific performance and management related problems as well as broader organizational wide objectives such as strategic and succession planning. Most importantly, however, coaching is increasingly recognized as the best method for improving individual and team performance.

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<sup>i</sup> Names have been changed to protect anonymity