



Case Study: Executive Leader

Background

MB is a Managing Director for a national wirehouse firm, responsible for managing 165 advisors in his region. Total AUM for his group is \$15 billion, with many million-dollar producers as well as newer FA's just starting their careers.

As the director of a large region, MB wanted to maintain his high-level of performance at work while making more time for his family at home and getting more enjoyment from his career.

Additionally, MB wanted to: manage perceptions at work, communicate his accomplishments more effectively to senior management in the firm, find a better work-life balance, and improve his organizational skills.

In his own words, "I wanted to redefine success for myself, while taking an objective look at everything I've accomplished."

How Coaching Worked

"I've interviewed coaches in the past but have never hired one because it always appeared that they were selling a program. The coaching didn't seem to be specific to my unique situation. I knew that if I were going to hire a coach I would have to have a high degree of trust and really know that this person would add value through our coaching relationship."

MB met his current ClientWise coach through his professional network. He began his engagement with a few trial coaching sessions, to see if it would be a good fit for both him and his coach. "After 30 minutes of our first coaching session, I was convinced that my coach was the right one for me. It was awesome—much better than I expected it to be. The program was completely tailored to my needs."

MB and his coach began having a weekly call every Friday. They also held just-in-time coaching sessions, in which MB called his coach during the week to discuss immediate situations that would come up. And sometimes his coach would call him

outside of their regularly scheduled sessions to touch base and connect.

The picture began to fall into place, working from the ground up. "There was so much good stuff in our coaching sessions I often want to go back to earlier sessions and review things we covered to make sure that I am fully leveraging the content of those sessions."

Similarly, MM's mindset remained primed for new ideas. "I really wanted to open myself up to new ways of thinking. For example, I always perform well every year, but my coach challenged me to think, why couldn't I get everything done in the first 90 days? In other words, why couldn't I set up a framework for what I wanted to accomplish for the year in the first quarter? That way, everything would more easily fall into place during the year. Considering my life/balance issues, my coach and I really start working on organizing principles for managing my business life."

Results

"Through coaching I've gained a better understanding of the relationships between myself, my family, my job and my community. And family is not just my wife and my young daughters; it's also my extended family. I have a better understanding of how they interrelate and how to manage those relationships."

"I've always been a top performer at work, but now have a much better work/life balance through coaching. I'm also more effective at communicating with both my supervisors and my employees. There's sometimes a disconnect between how we see ourselves and how we're seen by others, so I'm now more acutely aware of the importance of

managing perceptions of my job performance at all levels of the company."

"I really like the principle of 'Can you get everything established in the first 90 days of the year to set the ground for everything that you want to get accomplished by the end of the year?' That's been a great mechanism not only for me and for my staff, but also for supporting the advisors in my region. I encourage my FA's to put it to work in their own businesses. 'Can you put everything you need in motion for the inertia to carry you through the entire year?' That's an amazing concept. It's a great organizing principle."