

*This document is based on the article “Executive Coaching Case Studies”
by www.optimalthinking.com*

Executive Coaching Case Studies

The six executive coaching case studies below represent our executive coaching programs. An executive coach serves as a safe **objective sounding board**. The Optimal Thinking coach empowers CEOs and executives to be their very best.

To ensure strict confidentiality, optimization coaching takes place with a non-disclosure agreement. Hence, we have omitted information that could identify any participants. Click below to review the case studies that interest you:

- [1. Senior Executive with Performance Gaps](#)
- [2. Developing High Potential Leaders](#)
- [3. Integrating a Senior Executive from Another Company](#)
- [4. Gender Diversity](#)
- [5. Outplacement and Career Transition](#)

There are many intangible benefits of coaching. We calculate the ROI by defining the benefits in monetary terms (where possible).

$$\% \text{ ROI} = \frac{\text{Benefits Obtained} - \text{Coaching Cost} \times 100}{\text{Coaching Cost}}$$

1. Senior Executive with Performance Gaps

Situation:

The Chief Technical Officer of a multinational corporation was in conflict with peers and direct reports. His technical and business acumen were exceptional. But he was egotistical, condescending, and had a short fuse. The company was sidelining him from key initiatives and looking at terminating him.

Approach:

[Dr. Rosalene Glickman](#) discussed his derailing behavior with the CEO and global HR leader. They initiated the following leader optimization program:

- Initial "[Are you coachable?](#)" screening
- A comprehensive 360 degree assessment
- A one-year weekly coaching program (by video conference)
- Bi-weekly reports to HR



Rosalene Glickman, Ph.D.
CEO and Executive Coach

During the initial coaching sessions, the executive's destructive behavior was evident. His communications were often confrontational and derisive. He left no room for others' to save face. The senior executive admitted that he needed to improve his communications. He was willing to upgrade his conflict management skills.

Rosalene and the senior executive explored the impact of his abrasive communications. They examined various strategies for controlling his destructive impulsive responses and resolving conflicts. They role played impulse control in various confrontational scenarios. They also practiced assertive communications to arrive at optimal solutions.

Outcome:

The executive reported that he was deploying the new learned behaviors. 360 degree assessment feedback confirmed that he was treating his peers and direct reports respectfully. He was demonstrating increased emotional intelligence and managing conflicts well. His new assertiveness skills were enabling him to deliver instructions with greater impact. And he was praising others for their contributions. After nine months, the talented executive was no longer at risk of termination. What's more, the coaching program delivered an ROI of 27.14 times the investment.

2. Developing High Potential Leaders

Situation:

A global organization needed to prepare a new generation of leaders for senior leadership roles. Rather than compete for talent in the marketplace, senior management had decided to develop internal personnel. They selected seven high potential employees to take part in our leader optimization program.

Approach:

Rosalene met with the senior leaders and HR to clarify their strategic objectives. We then deployed our 360 assessments to clarify the employees' leadership competencies. The reports revealed various performance gaps including:

- Strategic thinking
- Inspirational leadership
- Collaborative decision making
- Team building
- Executive presence
- Organizational savvy
- Customer focus
- Conflict resolution

The employees' strengths and weaknesses were matched against the company's strategic requirements.

Rosalene reviewed the results with each high potential executive. Together, they created a one-year coaching plan to optimize three key competencies. They deployed Optimal thinking to optimize performance.

Rosalene met with the executives on a weekly basis. She updated the HR leader during bi-weekly meetings. At the end of the 12-month period, the seven employees took the same 360 assessments.

Outcome:

The Optimal Thinking [executive coaching](#) program received an excellent score from all seven employees. The 360 degree assessment confirmed that the competency objectives were met. Performance appraisals also confirmed that the executives had met the targeted objectives. The executives experienced dramatic increases in job satisfaction and teamwork.

The high potential leader optimization program delivered an ROI of 12.02 times the investment. And the company recorded productivity and customer service improvements of 32% and 27%.

Five executives were promoted to senior positions at the end of the first year. The other executives were selected for future promotions.

This leader optimization program is now an integral part of the company's leadership development program.

3. Integrating a Senior Executive from Another Company

Situation:

An oil services company recruited a brilliant C-level executive from a competitor to drive growth. The C-level leader was innovative and had extensive industry experience. He was relocating from Europe, and was not tuned in to the cultural norms of Southern California. What's more, his team of seasoned senior employees were apprehensive about working for the outsider.

The CEO was wary of disruption. He decided to fast track the C-level executive's success with a comprehensive onboarding program. He understood that onboarding would take more than 90 days. He expected it would take a full year.

Approach:

Rosalene was retained to work with the C-level executive during his first year. With input from the CEO and HR, she customized a program with the following elements:

- A meeting with the CEO and HR to determine the success factors and likely challenges in the new role.
- A one-year integration program with 90-day optimization segments for quarterly reviews.
- An initial individual assessment of the C-level executive via interviews and surveys.
- Interviews with key stakeholders about key objectives and potential obstacles.
- An open meeting with the C-level executive and his direct reports to enable them to get to know each other.
- Written and verbal feedback with the C-level executive.
- A meeting with the C-level executive, CEO and HR to ensure alignment with the integration plan.
- Individual weekly coaching sessions for 12 months.
- Quarterly check backs with the C-level executive, CEO, HR and stakeholders.
- Evaluation of progress at the end of the year, including specific plans for the future.

Outcome:

During the first year, the C-level executive worked with Rosalene to embrace the [organizational culture](#). As the leader adjusted to the new environment, he empowered his team to maximize unforeseen innovative opportunities. He earned the trust and admiration of the CEO and his coworkers.

The executive is now a highly respected member of the company. He has spearheaded the company's growth trajectory and increased profitability.

4. Gender Diversity

According to a recent [Harvard Business Review study](#), fewer than 5% of CEOs of public companies are women. But where there's a will, there's an optimal way.

Situation:

A talented VP of an engineering company needed to optimize her leadership and management skills. Senior management had selected her as a potential candidate for promotion.

The VP was often distracted by requests from peers and superiors that had nothing to do with her job description. She would also take over from her direct reports when they didn't complete tasks to her satisfaction. She needed to learn how to harness team effort, delegate tasks, and ensure deadlines were met.

Approach:

Rosalene discussed the situation with the C-level superior and HR. A [360 degree assessment](#) provided insight into the VP's strengths, weaknesses, and areas for development. The assessment revealed that she was very strong in client relations and the technical aspects of her role. Yet she was reluctant to make tough decisions that could upset team members. She was conflict averse, afraid of emotions spinning out of control. This management deficiency stemmed from a lack of confidence in her ability to remain calm in a storm.

Together, they designed a weekly optimization coaching program to resolve workplace conflict. She was then able to best deploy the talents and abilities of her people. They reviewed and resolved workplace scenarios that generated conflict.

During weekly [executive coaching](#) sessions, they tackled workplace issues that undermined her self-confidence, including:

- Optimizing conflict management skills
- Understanding the team's strengths and deficiencies
- Delegating optimally
- Best managing projects to ensure deadlines were met

Outcome:

At the end of the one-year coaching assignment, the VP was managing conflict proactively and performing her role with self-assurance. She was delegating tasks to her direct reports that had taken around 20 percent of her time.

By harnessing the innate talent and experience of her team, she was able to focus on strategic objectives. She implemented schedules and planning procedures to maintain focus while meeting deadlines.

Her business results exceeded expectations during the next 12 months. She even received a [Best Coworker Award](#). Recently, she was promoted to fill an important senior vice president role within the company. The coaching assignment has produced a 19.21 return on investment to date.



5. Outplacement and Career Transition

Since 2004, we have helped senior executives to best navigate difficult transitions to new and rewarding roles.

Our Executive Coaching Case Studies Matter

Hundreds of business schools deploy our executive coaching case studies. These case studies are the result of over 30,000 hours of one-on-one coaching with

- Fortune 500 leaders
- YPO presidents
- Senior executives
- Entrepreneurs
- Rising stars