

# Case Studies

Here are some case studies of the work we engage in. Philip Lloyd-Williams takes the lead on all commissions, calling on people from his trusted family of associates to assist him as necessary.

As these case studies show, we can deliver value in three key areas:

1. Improving organisational performance
2. Working with teams
3. Supporting individuals.

## 1. Improving organisational performance

### Design and delivery of an institutional management and leadership programme

**The challenge:** A top ranking higher education client, who we have worked with for several years, approached us to design a management and leadership development programme aimed at middle managers.

**Our solution:** Delivered over a 12 month period the programme started with a 360 degree assessment. The content of the programme focused on areas like Team Leadership, Political Management and Project Leadership. We worked hard to ensure that the content met the needs of those attending and was delivered in a practical and challenging way. To keep things interesting we included activities like an 'Innovation Lab' to explore problem solving techniques.

**The outcome:** Repeating the 360 degree assessment 18 months later as a comparative tool showed the programme to be a huge success. The client reports that staff who attended manage better, are more effective leaders and are more willing to apply for promotion.

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## Strategy creation – leadership team and staff engagement

**The challenge:** We were approached by a client who had made several unsuccessful (by their own admission) attempts to define the strategy required to deliver a complex health service. They wanted us to work with them to clarify their thinking and engage their workforce to deliver.

**Our approach:** Firstly we spent time with each of the leadership team establishing the strategy's purpose and the key aims and objectives. We worked systematically with them to define the required outcomes. Having defined a broad outline we took this to the team who were going to deliver the services to patients. Doing this proved to be very helpful in terms of engaging people and securing their interest and enthusiasm. This in part due to our use of activities, good humour and fun to bring energy to what could have been a very 'dull' conversation.

**The outcome:** We finalised the strategy and it was very well received, as hoped our approach had engendered a real sense of ownership and commitment from the delivery staff.

## Supporting culture change as part of business transformation

**The challenge:** A large public body asked for our help when implementing a cultural change programme as part of a wider business transformation project. Their staff were a little skeptical – understandably as they had only recently been exposed to several, less than successful, programmes of this type.

**Our solution:** To help people become more open and responsive we spent time with them, simply asking them to express their concerns. We then involved staff in designing the cultural change event days – our aim was to make them active participants, not just delegates at the events. Talking to people we discovered a collective sense of humour which is something that we reflected in the events.

**The outcome:** The programme was successful, initiating a change in people's attitude, behaviour and working practices. Our continued involvement has helped to consolidate and embed those changes.

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## Governing body strategic review away days

**The challenge:** We have extensive experience of working with Boards, Governing Bodies and governance systems/processes. It was our reputation in this area which convinced one client to approach us to design and facilitate their Board's 'away-day', ensuring it delivered the required outcomes.

**Our approach:** The focus of this event was to review past performance, horizon scan to determine future risks/opportunities and determine a strategy for the next 2 to 3 years. To achieve this we facilitated group work and debates giving everybody an opportunity to contribute. Where we really added value was in how we tested assumptions and challenged the Board and Governing Body until they were clear on their purpose, expectations and outcomes.

**The outcome:** Such was the impact of the event that, as with many of our other clients, we have been asked to facilitate it annually.

## 2. Working with teams

### Tackling a dysfunctional clinical leadership team

**The challenge:** We were commissioned by a large NHS department to work with a difficult and dysfunctional clinical leadership team. We are known for our expertise in dealing with problematic and challenging teams and so were confident we could facilitate a positive change.

**Our approach:** Spending time with each team member unearthed some core but previously unexpressed problems. Given this, our next step was to facilitate a series of difficult, but essential, conversations between team members. We believe this is an essential step to genuinely address dysfunction. We take great pride in the fact that clients often cite this as something we are particularly good at when recommending us.

**The outcome:** It's fair to say that this process was demanding for all concerned but it 'kick-started' a new approach from the team and a shared commitment to working in a more collaborative way. This has significantly improved their relationship with each other and the wider organisation.

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## Building team confidence

**The challenge:** Often a client will approach us with a request for a 'Team Away Day', but without a clear sense of what they really want. We quickly realised this was the case with a client in charge of fundraising at a hospice. So we met with them and the staff involved in fundraising to really understand the root cause of the problem – that donations needed to meet income targets were not being acquired. We quickly established that the problem wasn't a lack of confidence around asking for donations, or talking about money generally. What staff did lack was a language they could use when talking to prospective donors.

**The solution:** We needed to give the fundraisers a language that they felt comfortable with. For example, instead of asking for a 'donation of £2000', we suggested they should ask a local business to 'sponsor a nurse for a week' which costs about that. Instead of aiming for a 'sale' their objective should be to make a 'good ask' which is thereby more likely to result in a donation. We combined this with a series of observational and participative sessions where staff role-played. A follow-up session four weeks later put staff together with strangers to role-play in a more realistic scenario. Final preparation included filming and the use of mystery shoppers.

**The outcome:** These adjustments made a huge difference to the fundraisers confidence and skills of persuasion. They are now consistently exceeding their monthly income targets.

## Creating a Team Charter

**The challenge:** There's a common belief that 'if it isn't broken, don't fix it' – but we don't think this applies to teams. In our view, for a team to stay at the top of their game they must continually (or at least regularly) refresh their focus and commitment. This was the case with a team of front line health professionals. They were a well-regarded, successful and settled team, but they risked complacency, had a lack of succession planning and insufficient challenge to keep them improving.

**The solution:** We undertook a series of interviews with team members to allow us to design a Team Charter Day. During this event we facilitated group work around a set of themes designed to create a 'Team Charter'. This document, written in the language of the team, clearly states how they will all work together going forward.

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**The outcome:** The impact of the charter has been significant and exceeded all expectations. Everyone now understands the need to keep improving and they have introduced practical measures like 'job shadowing' and making it a priority to induct new team members into the charter.

### Reducing team dysfunction

**The challenge:** A client came to us utterly frustrated at how poorly a critical customer-facing team was performing. They were in conflict, playing out long-standing grievances and sometimes even refusing to speak to each other! Consequently they delivered poor service to their customers and were greedy in terms of the time and effort they took to be managed. The client thought the only solution was to disband them.

**The approach:** Aware of how difficult it is to change ingrained, legacy behaviour we knew our approach had to be targeted and focused. So, every five weeks we facilitated a 2-3 hour session with the team focusing on an agreed set of issues. We worked on those problems, refusing to move on until there was some resolution or at least a recognition of the problem. Deliberately we did not attempt to solve all the problems in one go, and over the sessions many issues surfaced and were resolved. The final session, at the team's request, was a planning session where they agreed to a nine month plan of service improvement and team building.

**The outcome:** The client has reported positive progress and an improvement in customer satisfaction. All thoughts of disbanding the team have been abandoned and instead they are investing in their future.

### Developing remote workers into a team

**The challenge:** It is a fact of life that newly formed teams need and time and space to develop and function at their very best. One international client had appointed a new team who all worked remotely. Although their roles were inter-dependent they rarely came together. Having formed, this new team was rather stuck in the 'storming' phase. To move them forward, we were asked to design and deliver a twelve month development programme to help them learn about each other, how to work together and how to celebrate success.

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**The approach:** We asked each of the team to complete a Myers Briggs questionnaire to understand their personality types. We then followed this up with a session to help them understanding themselves and their colleagues better. Designed around experiential learning the session used team games and practical activities to prompt reflection and spontaneous discussions about their differences as colleagues.

**The outcome:** The team started to interact differently having gained a better insight of themselves and their colleagues. They have since designed and delivered events together which played to their known strengths in terms of skills *and* personality. The team continues to go from strength to strength.

### 3. Supporting individuals

Philip Lloyd-Williams holds the ILM Level 7 accreditation in Executive Coaching & Mentoring and takes the lead on all coaching delivery.

#### Coaching a Vice Chancellor

**The challenge:** The client was facing a difficult time with their senior management team and approached us for some coaching around effective leadership.

**The approach:** Philip Lloyd-Williams solely worked with this client, developing a 'safe place' where the client felt comfortable exploring their concerns. With a focus on identifying practical ways to resolve key issues Philip soon became a trusted advisor. There were some tough and direct conversations – this is Philip's style as he doesn't shy away from necessary, but difficult conversations. Focused on delivering real outcomes, each session ended with two things: a commitment from the client to reflect on a significant issue and one or two practical actions.

**The outcome:** From these sessions the client formulated strategies to deal with the mix of personalities in his management team. He also determined what shape the team needed to be to ensure operational effectiveness, using this as a tool to plan and instigate his organisational review.

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## Career coaching to secure new role

**The Challenge:** Ready to move on, a client approached us after she failed to secure a new job despite a number of interviews. This surprised her as she had an excellent track record and the qualities and experience required.

**Our approach:** Career coaching has a slightly different emphasis to other forms of coaching. We started by asking her to be clear and purposeful about her reason for seeking a new job. Helping somebody to understand their motivation is essential, as it will determine their behaviour when being interviewed. We also provided practical support – reviewing her CV and recent applications, checking presentations and conducting a mock interview. Our feedback to her was practical and specific – she needed help to conquer her interview nerves and development targeted around her personal leadership skills.

**The outcome:** The client successfully secured the next role she applied for. This client is not unique, this is a real growth area for us – and one in which we have an excellent track record.

## Delivering advisory support for recruitment

**The challenge:** Recruiting to senior legal and governance roles can be challenging at any time, but is particularly challenging if you have little experience in those areas. This was the situation our client found themselves in and so asked us to help determine the technical competency of candidates applying for an In-house Counsel role.

**The solution:** We designed a series of written tests accompanied by marking plans, and a set of practical scenarios to use in the interviews. In combination, these two elements rigorously tested the required competencies. We ran the recruitment process for the client who then used that information to make the appointment.

**The outcome:** The client was very pleased with their new appointee. To help the person transition smoothly into their new role we were also asked to deliver a number of coaching sessions and one year on the appointment continues to be successful.

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## Executive coaching to support a newly promoted director

**The challenge:** When a senior leader is promoted to a corporate leadership role the transition can be daunting. As one newly promoted director found, there is lots of scope for self-doubt and a sense that leadership is a lonely role. It was at this point that he approached us.

**The approach:** We don't view coaching as a form of therapy but as a way of tackling complex problems to find practical solutions. Our 'real-life coaching' is supportive, direct and pragmatic. Most importantly, it is based on the needs of an individual and their situation. Our aim was to help this director learn, reflect, adapt and grow into his role. To do this we held six coaching sessions with him, each lasting 2-3 hours, over a period of 10 months.

**The outcome:** That leader is now regarded as a top performer and has asked us to work directly with his management team.