

## Case Study

### Coaching and Performance Management

#### The Client

A division within a FTSE 100 life and pensions company, employing 5,000 people in the UK and abroad. The company has a reputation for excellence, and is a consistent winner of technological awards for Pensions and Protection.

They are an organisation with a long history and traditional values. The company places a strong focus on being ethical and treating people fairly. Company values relate to service to others, co-operation and the importance of customers.

#### Their Need

##### An Increasingly Challenging Operating Climate

In early 2008 markets were shifting rapidly and the financial climate was increasingly daunting. The organisation needed to tackle the challenges head on, with a restructure and the emergence of strong leadership and management behaviours. One senior executive spoke plainly;

‘The message is clear; the clock is ticking. We must become a more challenging, focused and driven organisation, which demands that we all demonstrate better leadership and management skills.’

##### A Need To Get Stronger at Managing Performance

A review of the performance management framework also revealed the need to adopt a robust approach to managing performance. Appraisal documentation, satisfaction surveys, plus anecdotal feedback suggested that increased emphasis and consistency were needed. Managers wanted greater surety and confidence to handle the following:

- Agreeing clear performance objectives, both with individuals and teams.
- Ensuring a continuing focus on learning/performance improvement throughout the year, e.g. within regular 1:1 update sessions.
- Developing Talent, e.g. to alleviate pressure from themselves as ‘experts’.
- Effectively managing poor performance, e.g. giving constructive feedback in a way that creates learning and improvement.
- Using the Performance Management processes as a fair and objective vehicle for reward and recognition.

Our client, a board member, was convinced that some traditional values needed to evolve;

‘We need to encourage more straight-talking from managers to improve performance of individuals. That means stretching people with better coaching and feedback as a consistent leadership style.’

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Coaching skills were seen as critical to managers in tackling these challenges in an increasingly difficult trading environment. Starr Consulting were asked to develop a programme of development that made sure classroom learning made a real difference to what happened in the workplace.

### The Solution

#### Process, principles and skills

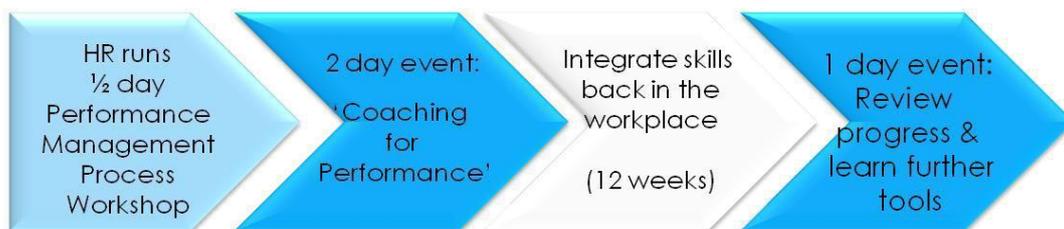
Our approach increased clarity of the HR Performance Processes, then strengthened its delivery by teaching managers coaching tools and techniques. Managers were shown how to coach both in meeting situations and in the live environment, i.e. as a natural response to everyday issues and enquiries.

#### A 3 month learning journey

Activities were blended to create a learning journey over 3-4 months, e.g. self-assessment, training events, telephone coaching and reading. Other features of the approach included:

- HR delivered a half-day workshop to increase clarity of the Performance Management Process, e.g. key terminology, defining clear goals, etc.
- Starr Consulting delivered learning events and were supported by the client's internal coaching resource, e.g. internal coaches supported managers during and between learning events.
- Senior managers attended events alongside their colleagues. The learning experience was cascaded to any manager with three direct reports or more.

The learning journey and approach is illustrated below:



Supported by telephone coaching, reading and self-assessment



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#### The Results

##### Engagement, ability and a common approach

The company performed electronic surveys which gathered feedback as well as self-assessment data. General feedback was taken immediately after events, with a more rigorous assessment three months after the final coaching event. Data indicated the following results:

- Increased engagement and ability in coaching, especially during less formal, everyday conversations in the workplace.
- Increased comfort with the principles of 'plain speaking' and using coaching to increase openness and trust.
- Increased support for the management performance life-cycle, e.g. agreeing targets, performance reviews and giving constructive feedback.