



Kathryn Kemp, CPCC

510.599.1101

kathryn@kathrynkemp.com

2625 Alcatraz Avenue #102

Berkeley CA 94705

www.kathrynkemp.com

CASE STUDY

A Collaboration between TeamSpirit Coaching and Team Resource Coaching

Campus Life Services (CLS) Programs and Services Operational Team "The General Managers"

Team Coaching Engagement February 2009 – August 2009

EXECUTIVE SUMMARY

The General Managers are part of a large university system that is currently experiencing the worst financial constraints in its history. As a result of the growth in their leadership skills through team coaching, the General Managers created a plan that would add \$100,000 to the team's bottom line, despite the restrictions imposed by the larger organization. **Given that information, the minimum return on investment for the team coaching engagement is 300% and the maximum could be much higher as the results of the team's performance for FY09 are calculated.**

BACKGROUND/OVERVIEW

The Campus Life Services (CLS) Programs and Services Operational Team (the "General Managers"), comprised of 5 people, is part of a large, multi-campus university. The team members are the General Managers of the programs and services offered by CLS. They manage all operations for Arts & Events, Outdoor Programs, and two Fitness Centers within the university. The team's mission is to enrich the human spirit, quality of life and community at the university. Their vision statement is to be indispensable leaders and partners in the achievement of a quality of life standard making the university the institution of choice for students, faculty and staff.

The General Managers team is nested within the CLS Strategic Leadership Team. The Director and three key managers retired from the Strategic Leadership Team, and new leadership was put into place. As the Strategic Leadership Team was forming, it engaged in team coaching with to clarify roles, to set goals and to practice effective teaming behaviors. The success of the Strategic Leadership Team's coaching engagement led the General Managers to hire team coaches to help them set clear goals and accountabilities, increase trust and develop the team members as leaders.

At the start of the engagement, the General Managers identified several short- and long-term goals they wanted to achieve as a result of team coaching:

- Prioritize projects by agreeing as a team what they wanted to accomplish to be successful in terms of the team's mission and vision
- Create a strong relationship with the Strategic Leadership Team so that they supported the operational aspect of CLS; the General Managers felt that the Strategic Leadership team held old perceptions of the General Manager team that they wanted to change
- Increase influence with the Strategic Leadership Team
- Develop the leadership skills of the team members
- Identify each team member's function and role
- Build a better understanding of business areas and challenges
- Develop effective teaming behaviors to build trust among the General Managers



The General Managers determined that success would be measured by an increase in the bottom line of the team's annual budget (YE 6/30/09), improved customer service scores and improved employee satisfaction scores.

THE COACHING APPROACH

The team coaches structured the team coaching engagement in four parts:

- Meet with the team to kick off the engagement
- Administer a team assessment that measured the team's strengths and areas of opportunities related to productivity as well as strengths and areas of opportunities related to effective teaming behaviors
- Conduct a two-day on-site team coaching retreat
- Lead six 1-1/2 hour conference calls with the entire team on a monthly basis

Initial Meeting:

The team coaches met with the General Managers team in person for two hours to begin the team coaching process. The agenda for the meeting was to allow the co-facilitators and participants to meet each other, to introduce the team coaching model, to prepare the participants for the assessment and to answer any questions the participants might want to ask about the team coaching process.

Assessment:

The assessment allowed the team to self-report their strengths and areas of opportunity at the start of the coaching engagement, revealing measurable data they could use as a baseline to determine the success of the program. The results were measured on a scale of 1 – 9, 9 completely describing the team. The team rated themselves highest in team leadership (6.0) and respect (7.3). The lowest scores were for decision-making (4.8) and communication (5.4). More specifically, the team felt a strong sense of cooperation (7.2) and mutual respect without blame (8.0). They reported that areas of opportunity included dealing with exhaustion (3.0) and stopping the practice of "sugar coating" the truth to avoid hurting others' feelings (3.2). The assessment also revealed a desire to become more strategic than reactionary and to manage time so that day-to-day operational activities did not prevent them from addressing the "big picture" goals of the team.

Team Coaching Retreat:

Based on the assessment results as well as on meetings with the team leader, the team coaches structured a two-day retreat that would provide the team with tools to leverage their strengths to meet their stated goals. The team coaching exercises were experiential in nature and required the team to participate on a somatic level in addition to an intellectual level. It is important to note that the coaches' role was to provide structure, to provoke thought, and to empower the team, but not to "fix" problems or to provide solutions. It was the team's work to participate fully and to take responsibility for the outcomes.

The first exercises centered on the development of a "team contract." The team adopted agreements regarding behavioral norms, such as qualities they would like to be present on the team (trust, respect, enthusiasm, etc.), examples of specific behaviors that support those qualities (attending meetings on time, meeting deadlines, etc.) and ways of handling conflict skillfully. They also created a structure where team members could voice risky or unpopular opinions safely in service of innovation and clear communication.

The next set of exercises was designed to engender mutual understanding and respect for each other's position on the team. Each team member "walked in the shoes" of the other team members. This experience allowed team members to develop compassion for each other as well as to understand other team members' day-to-day responsibilities. Then the team moved from their individual positions to a position where they could experience the team as a whole from a strategic point of view. From that vantage point, the team captured action items that would move them toward the success measures they defined. During the debrief of the retreat, the team leader reported that this set of exercises yielded the most powerful results for the team, both in terms of creating a



sense of team spirit as well as starting the process of identifying the high-priority projects that would move the team forward.

The retreat continued with a focus on leadership development. Each member of the team was acknowledged for their visible strengths and talents. Then requests were made of the team members to practice specific leadership behaviors that stretched them out of their comfort zones. This expansion of leadership roles allowed new ideas to surface for the team. They began the commitment to behave differently to achieve the results they wanted.

The rest of the retreat focused on action items. During the retreat, ideas and action items were harvested from each activity. Together, the team prioritized the action items and created a strategic plan for completing the projects identified as having the highest importance. They also created agreements about the activities that would promote effective teamwork.

Follow-on Team Coaching:

The team coaches designed the six-month on-going coaching to hold the team accountable for the action steps related to their strategic plan, to expand the learning related to effective teaming, to celebrate successes, to provide support when the team encountered obstacles and to help the team name next steps as projects identified during the retreat were completed. The team's level of engagement remained strong throughout the course of the coaching process, which contributed to the level of success they experienced.

THE RESULTS

Overall, the team leader rated the success of the coaching engagement as a 4 on a scale of 1-5 (5 being the highest). Both the tangible and intangible results of the team coaching process are highlighted here.

Effective Teaming Behaviors:

At the end of the retreat, the General Managers reported that they felt like a team rather than a collection of individuals who happened to work together. They clearly identified roles and responsibilities and acknowledged the strengths of each team member. Trust and confidence increased dramatically, both on a team level and on a personal level. The team engendered a strong sense of support for each other, which was revealed in behaviors such as recognizing each other's successes, allowing space for each team member to speak up and to be heard, and constantly reminding themselves of who they want to be and where they want to go. They openly acknowledged and appreciated risk-taking behavior when team members move beyond their comfort zones. The team expanded its meeting schedule so that they meet more often than once per month, which helped create a greater sense of teamwork.

The team came to the realization that the team members love their jobs and want to make a difference at the university; nobody was there simply to receive a paycheck. They identified each other's strengths, leveraging each other's talents to create success for the whole team. The team focuses on fun and positivity, even in the face of great challenges.

Project Completion:

As a result of the learning gained during the retreat, the team continues to prioritize their goals and projects in a strategic fashion. The team accomplished quickly approximately three-quarters of their short-term goals. They continue to work on the long-term goals, although progress is slower than what they expected. The team leader made a commitment to keep the long-term goals on each meeting agenda so that the team can keep them in mind and create plans to complete the projects.

Leadership Development among the Team Members:

The General Manager team improved their leadership skills in a way that is getting noticed by other departments in the university. If they have an opinion, they "walk their talk" and own it. They communicate more powerfully,



avoiding blaming their issues on the decisions that the university makes for the entire organization. The change has been so dramatic that members of other teams express surprise. In prior years, other departments perceived the team as “whiners.” Now, the team is involved in strategic planning on important projects and their input is welcome and honored.

The team remains positive and enthusiastic even as it faces the worst financial constraints imposed by the larger organization in university history. Their leadership capabilities will be challenged as they manage 1,400 furlough days for their staff members without impacting customer services. The team leader feels that they would not be positioned for success during this difficult time without having participated in team coaching. In their ongoing development, they are focused on managing their time effectively to address the issues and projects that have the biggest impact on ROI. They are practicing their delegation skills, which has several effects: it demonstrates trust in their staff members, it frees more time day-to-day to focus on strategic planning, and it creates the conditions for succession planning.

Team Leader Development:

The team leader reports improvements in her personal leadership development as a result of team coaching. Prior to the engagement, she wondered if the team trusted to her to know what she was doing. She felt she had to know every detail of every program in order to be considered a capable leader. Her role was not clearly defined, as she is the Assistant Director for the Strategic Leadership Team in addition to her role leading the General Managers.

Now she feels a strong sense of trust from her team, and as a result, let go of her need to know details in service of facing outward and becoming more political than operational. She is learning the value of leveraging her team's strengths to achieve goals and is creating a more clearly-defined role for herself in CLS. The next steps for her development include delegating more effectively and creating clear key performance indicators for her success.

Relationship with the Strategic Leadership Team:

Changing the relationship with the Strategic Leadership Team is in progress and the gap is closing. The General Managers face an ongoing challenge to be seen in a new light as strong leaders. As the General Managers are developing more confidence in their leadership abilities, they are realizing the power and synergy they create with other CLS units. Their enthusiasm contributes to creating a culture of positivity in CLS. They continue to practice delivering their opinions with confidence and clarity in Strategic Leadership Team meetings, and they are backed up by the two people who are members of both teams.

Understanding the Business Needs of the Unit:

As mentioned earlier, the entire university is experiencing the worst financial constraints in its history, which were put into place near the end of the team coaching engagement. Even though understanding business processes was named as a longer-term goal during the team coaching retreat, the General Managers were thrust into understanding the business of its operations immediately as a result of the university's plan to cut costs and to increase revenue.

As a result of the growth in their leadership skills, the General Managers were able to make a business case for the importance of the services provided by CLS to create a pleasing university environment, thereby attracting students and faculty. They created a plan that would add \$100,000 to the team's bottom line, which was a huge success for the team and for the team member who led the project.



Measurable Results:

- **Customer Service Survey Scores:** The General Managers already score highest in the organization for customer satisfaction. This year, their scores improved from 4.0 to 4.2 (5 being the highest).
- **Employee Satisfaction Survey Scores:** Employee satisfaction scores improved over the prior year, except in the area of communication. The General Managers implemented a plan to improve communication with the staff as soon as the results were released.
- **ROI:** The General Manager Team finished their fiscal year-end \$200,000 better than what was budgeted (some of the impact realized was attributable to accounting mistakes that were uncovered). As mentioned earlier, the team also identified decreases to expenses and increases in revenue that could contribute \$100,000 to the bottom line. They are well-positioned to meet their goals for FY 2010, even as they face the challenges of the university's financial crisis (note: the FY 2010 goals may be jeopardized by the university's furlough program, which began on 9/1/09). Given the above information, the minimum return on investment for the team coaching engagement is 300%, and the maximum could be much higher, depending on the amount attributable to the \$200,000 budget overage for FY 2009.

Next Steps:

As goals are achieved and projects are completed, new objectives are identified. The General Managers named the following items as the next most important steps to continue their growth as a team and as leaders within CLS:

- Keep the long-term goals of creating synergy with the Strategic Leadership Team and strategic visioning/planning in the forefront by including them on the agenda for each team meeting.
- Improve communication with the staff based on the Employee Satisfaction Survey scores.
- Set up key performance indicators for next year.
- Focus on results – build on the foundation they created and realize tangible goals with fiscal results.
- Face the university's financial crisis with a positive attitude and dedication to efficiency and flexibility.
- Continue practicing effective teaming behaviors.

Recommendations:

The team leader identified the following recommendations she would make to create the most effective team coaching engagement with strong results:

- Do homework with the team in advance of the engagement to identify desired outcomes; trust the coaches to ask questions to help prepare the team
- Ensure the team has a common understanding and that expectations are clear
- Trust the facilitators
- Keep an open mind and stay open to the process
- Stay in the moment
- Know that the participants will experience many different emotions
- Avoid getting stuck in one area
- Let go when necessary
- Think through the process to best utilize the follow-up coaching calls and create a goal for each call