

## Coaching and Case Study Worksheets

Leadership and organizational coaching can be an effective vehicle to prompt systemic analysis, awareness and action. The following worksheets provide open-ended questions and a mini-case study for each element of the model. After each case study, ask:

- What impact might the change described have on the whole system?
- What recalibrations might be helpful to adjust for the current upheaval?



### Worksheet 1: Aligning Leadership in a Family Business

**Leadership:** *Influencing the behaviour of others toward a goal*

Leadership is an influence process that requires the voluntary choice of one or more individuals to adjust their thinking, attitude or behaviour to be effective. Leadership can be exercised by persons in formal roles of organizational authority, and by anyone else in the organization whose example is compelling to others. Leadership is typically made possible when those who are being led feel they have influence with the leader.

#### Coaching questions for your organization:

- How are our leaders engaged in good times and bad?
- How well do our leaders' preferences and actions serve internal and external customers?
- If "we're perfectly configured to get what we're currently getting," what new leadership roles and responsibilities do we need to take us to the next level?

#### Change Management: A leadership best practice to consider

Working with people isn't rocket science. It's harder than rocket science! Leadership can be lonely and isolating work for those who provide direction and support for others. Ensure you and other leaders in your firm have access to a coach. A coach will ask good questions and facilitate change, helping leaders move themselves and their organizations "from where they are to where they want to be."

**Case Study:** The Smith family has run a small chain of three retirement residences for 40 years. They pride themselves on a flat organizational structure in which every staff member reports directly to a member of the management team. Most staff are long-term employees who share the family's values of attentive service and compassionate health care for residents. The management team recently decided to purchase a competitor's operation of two additional homes. The competitor's operation was losing money and experiencing high turnover of minimum wage, part-time staff prior to the acquisition.

- What new leadership roles, skills and responsibilities will be required for a successful acquisition?
- How will Smith family managers need to "show up" in the first 90 days of the enlarged operation?

## Worksheet 2: Aligning **Strategy** in a Family Business

**Strategy:** *A plan designed to translate ideas into action to achieve an objective over time*

A strategic plan directs an organization to its desired future, and includes high-level goals and objectives to get there. Strategies are specific plans or ways of acting designed to accomplish the long-term vision. All organizations have strategy; regardless of how clearly articulated it is. An operational plan provides specific directions for employees to implement strategy within shorter time frames. Formal strategic planning is usually necessary to maximize success in competitive environments.

### Coaching questions for your organization:

- How could our strategic planning be more focused on attaining our long-term vision?
- How effectively does our strategy set direction, marshal resources, and focus effort?
- How is our strategy in tune with what we “can do, need to do, and want to do”?



### Change Management: A strategic best practice to consider

Ensure your strategic planning includes the fingerprints of employees you'll be counting on to implement the plan. Before holding formal strategic planning sessions with a few key leaders, engage in meaningful stakeholder consultation with a wide cross-section of employees, clients and suppliers. Before finalizing the plan, communicate how stakeholders influenced the plan. When a person feels they have contributed to the plan, their stake in its success and commitment to its implementation increases.

**Case Study:** A well-established, family-run restaurant on the outskirts of town has served relaxed, dine-in meals from Monday to Saturday from 7:00am-9:00pm for two generations. Its vision is “To be the destination of choice for family and friends gathering for hearty meals away from home.” Traffic has steadily grown at its intersection with the building of two huge new subdivisions. To increase profits, the family has decided to open the restaurant 24/7, and to install a drive-through window. The decision has caught most of the employees by surprise, most of whom do not want to work nights or Sundays, or at the increased pace of a drive-through.

- What impact may this strategy have on achieving the restaurant's vision over time?
- What risks have been introduced to the business with this new 24/7, drive-through strategy?
- How could the family manage these risks and strike a new balance in their system in terms of leadership, strategy, vision and culture? What steps might be helpful?

## Worksheet 3: Aligning Vision in a Family Business

**Vision:** *A desired future reality, imagined and described today.*

Vision answers the question, “How will the world be different because of what we do?” That vision, compellingly described, becomes a picture the people of an organization “can carry around in their heads.” It is like a “north star on the horizon,” providing constant and reliable direction over the years. When an organization’s culture supports a critical mass of leaders to implement a strategic plan in pursuit of their long-term goal, the vision becomes closer to reality.



### Coaching questions for your organization:

- Can our employees give a compelling description of “Why we do what we do”?
- What difference would it make if more people were heading in the same direction?
- What new alignments do we need between our vision and practice?

### Change Management: A visioning best practice to consider

Ensure your organization’s vision is so clear and attractive that it becomes a “compelling picture your people can carry around in their heads.” If the vision is unclear, schedule an offsite gathering to craft a vision to inspire your people for the long term. Find specific ways to empower employees to act on vision, introduce new alignments in support of its realization, and to root out practices undermining its progress.

**Case Study:** In response to the 2015 U.N. Climate Change Conference, a luxury home-building firm articulated a new vision for the company. “We will be *Leaders in Energy and Environmental Design (LEED)*, renowned for creating exquisite custom-built homes of unrivaled elegance and craftsmanship.” In pursuit of this vision, the firm decided it would insist on Platinum-level *LEED* compliance on all projects within 10 years. The company has always been environmentally responsible and efficient in its use of resources, where practical, but the vast majority of its projects would not currently qualify for Silver- or Gold-level *LEED* certification.

- How can the company ensure its newly-stated vision cascades throughout the enterprise so all employees are heading in the same direction?
- What new practices might be required to bolster progress towards the *LEED* goal?
- What current “ways of doing things” may no longer resonate with the new vision?

## Worksheet 4: Aligning Culture in a Family Business

**Culture:** *The dominant values, thinking, attitudes and behaviour in an organization*

Culture is the shared story of a group of people who share experiences over time. It is both explicitly expressed and intuitively understood by members of an organization. It includes guiding principles and behavioural norms that form the operating system of “how we do things around here.” Culture is “who and how we are,” rather than, “how we aspire or are told to be.” When an organization’s members describe something or someone as “a good or poor fit,” they are typically describing cultural alignment.



### Coaching questions for your organization:

- How do we describe our culture, individually and as a group? What “goes without saying”?
- To what extent does “How we do things around here” help us pursue our goals?
- How clearly does our culture reflect our values, and what impact does that have?
- If “culture eats strategy for breakfast”, how must our culture change for us to succeed?

### Change Management: A cultural best practice to consider

Find opportunities to bring your team, division and company together to eat, work, play, learn and build community. Memorable shared experiences can invite individual excellence and support corporate transformation. These represent important investments of time and money to build camaraderie, foster relationships and further develop positive elements of your culture.

**Case Study:** The founders of a family business were in the habit of compensating employees of their firm generously, and providing significant holiday bonuses to everyone in the company when profits were good. Teamwork had been named as a core value in the company since its inception. Upon the founders’ retirement, the new owners instituted strict policies of pay based on individual performance, and discontinued the practice of holiday bonuses even though their company was profitable.

- How might this shift in strategy affect culture?
- How could the owners manage the impact of the new policy on leadership behaviour and morale?