

Case Study: From Expert to Leader

Moving from Technical Expert to Leader with Regional Responsibilities

The Client:

The client is a highly qualified economist, who initially qualified in Hong Kong before achieving an MBA with distinction at one of the top UK universities. Following a stellar career as Head of Investment Research and Technical specialist for an Asia-based European Bank, she was promoted to the position of Managing Director and Chief Investment Officer with regional responsibilities. Her new role included the creation of the bank's Asia investment strategy, leading a team of investment specialists and appearances on television.

The Brief:

After struggling with the increased workload of her new role, the client became overwhelmed with work and was at high risk of burn out. Working long hours at fast pace put her and her family under enormous strain. As part of the bank's Asia-wide Executive Development Program, I was selected for the coaching panel and was subsequently chosen by her as Executive Coach to help develop more effective working strategies.

Client Goals:

The primary objective was to better cope with her expanded and very demanding executive position through:

1. Letting go of former responsibilities
2. Managing the performance of her team
3. Boosting her effectiveness in executive meetings
4. Being a more dynamic presenter and speaker
5. Developing strategies for setting and sticking to working boundaries, to create more time with her family

Action Taken:

Over the course of 16 hours of one-to-one coaching sessions we gathered 360° feedback and took a deep dive into her management techniques, delegation strategies, working effectiveness and assertiveness – with the objective of helping her regain control. We also worked on developing a powerful elevator pitch for use internally, with clients and during her television appearances.

Outcomes:

- Increased self-awareness
- Better workload management and delegation (freeing up 30% more time to be strategic)
- The development of deeper relationships with fellow executives and her team
- The development of a more effective communication style
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Positive feedback of improvement from key stakeholders

Post coaching comments:

'I would like to express my sincere gratitude for the professional support and valuable advice from both of you throughout my executive coaching program. I've found the coaching experience highly rewarding and inspiring which has provided important inputs for my personal development plan and strategic business review. In particular, I would like to extend a special compliment to Trevor for his personalised, practical and thought provoking advice. I've learned a lot from Trevor and believe other colleagues would benefit from his highly professional coaching.'