

# CASE STUDY



## Chartered Accountants

**Practice with approximately 30 partners /employees.**

The client wishes to be kept anonymous. The coach was Anita Morris.

### ***Project – Leadership Development / Succession Planning***

The senior partner of a successful accountancy practice contacted Anita Morris with a view to discussing the benefits of coaching to him and his organisation. The partner was somewhat sceptical about coaching but had heard about Anita through a trusted party. Having had an initial meeting with Anita the partner decided to embark on a coaching programme which was specifically designed to meet his needs.

The main objective of the programme was for the client to put a succession plan in place, which was acceptable to all partners and of benefit to all employees. As with all coaching programmes objectives change and develop through the coaching process. The succession plan remained a primary objective but others were added. Anita and the client worked together for approximately twelve months. During the first few months the coaching sessions were held every two weeks and to the end of the programme every two months. This way the client was able to develop his skills without becoming reliant on his coach, and was able to continue his development after the conclusion of the project.

The client felt that the programme had had a very positive impact on him and the business. He became more aware of his priorities and his leadership style. He is now able to delegate more, is more confident, more overtly interested in staff and is giving positive feedback more and tackling difficult issues more. Having developed goal setting skills he has since set new goals, all of which have been achieved. In particular, a succession plan is now in place and a practice manager has been employed to enable the client to focus on his priorities.

On a personal level the client says that the programme has 'Given me a lot of confidence and self-awareness'.

The client says that he has shared a lot of his learning with his staff. Before coaching he was very sceptical but now realises that although his staff get a great deal of technical training they should concentrate on soft skills and personal development more.

He would definitely recommend the programme, "It was excellent, I wish I could do it all again".

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