

THE WHEELS OF LIFE



CASE STUDY – BUSINESS

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Case Study – Business Wheel of Life

Case Study Construct

All case studies for The Wheels of Life site have been compiled from real-life coaching sessions conducted by Master Coach, Noel Posus. That said, all identifiable client information has been removed, and where necessary, some specifics of the coaching process may have been edited to ensure anonymity of the client and/or to condense a lengthy coaching relationship into a smaller, more manageable format to read and study.

In some cases, a composite of various clients has been created to make a case study which covers more potential scenarios in one document.

These case studies are high level only and will not go into extraordinary detail regarding conversations between coach and client. The purpose of our case studies here is to be able to identify the presenting objective and/or issues of the client, and how The Wheels of Life tools supported the overall coaching process, and to explore the outcomes which can be both directly and indirectly related to the use of these tools.

Client Overview

The client presented with the following Business-related life coaching goals:

- o The client worked for them selves as a sole practitioner and identified that they did all of the business responsibilities themselves, but also realised there were many areas where they were falling down in, didn't enjoy, and therefore felt the business wasn't very successful.
- o They also stated that they didn't really have a business plan for where they wanted the business to go and recognised how important this was to have.

The client is a self-proclaimed relationship focused business person and doesn't like admin, reporting, sales or most of the day-to-day "boring" (client word) operational activities.

We agreed up front that our relationship would include a combination of coaching, mentoring and training but would not include business consulting.

Wheel Scores

Below are the measures the client in this case study identified for themselves. Please note that in some situations, not every "pass" of The Wheels of Life tool the coach and client worked with, was necessary to complete. In such cases, that "pass" column will be left blank and a comment within the case study referencing that will be included.

KEY:

SP Satisfaction Pass

PP Positivity (attitude, energy and/or effort) Pass

NP Negativity (attitude, energy and/or effort) Pass

RP Resourcefulness (internal strength and return on investment) Pass

IP Importance Pass

NA Used if the client identifies the category is not applicable

| Environment | SP | PP | NP | RP | IP |
|--|-----------|-----------|-----------|-----------|-----------|
| Vision, Mission, Values, Objectives and Strategy | 1 | 1 | 7 | 0 | 10 |
| Partnering and Networking | 1 | 1 | 6 | 0 | 8 |
| Marketing and Promotion | 2 | 1 | 10 | 0 | 10 |
| Service Delivery | 8 | 8 | 2 | 9 | 10 |
| Systems and Administration | 1 | 4 | 8 | 3 | 8 |
| Researching | 6 | 5 | 6 | 6 | 9 |
| Training, Feedback and Sharing Knowledge | 6 | 8 | 3 | 8 | 8 |
| Continuous Improvement, People, Process and Technology | 3 | 2 | 1 | 3 | 7 |
| Team Ownership | 2 | 1 | 8 | 0 | 10 |
| Social Responsibility | 9 | 10 | 0 | 10 | 10 |

Methodology

As we completed the Satisfaction Pass and considering this is a sole practitioner, we agreed that Team Ownership would represent the various stakeholders to the client's success including partner, family, friends and business alliances.

We were able to go through all the passes in the first two hour session and found the Resourcefulness Pass one of the most interesting and lengthy parts of the conversation. There were a number of categories where the client realised that they were getting nothing or next to nothing back from any efforts (or more appropriately the lack of efforts). What this meant for the client is that they had to take personal responsibility, now, to make this change. Nothing was necessarily going to change in terms of their business success unless they (the client) took accountable action.

There were also a number of stresses raised by doing this exercise. One benefit of this and other Wheel of Life tools is that it can help get the issues out by moving away from the stories/narrative about the problem and focusing on a measurable number on the chart. It's just enough of an external focus that the stories become shorter and there is less subjective "stuff" to go with the identification. We have to move quickly through the Wheel, so we get honest answers faster.

We agreed to do two sessions for each of the environments, for a minimum total of sessions including the initial scoping session and a wrap up session to be twenty-two, each one week apart and each for two hours. (Typically coaching sessions would only go for an hour to an hour and a half, but this client wanted very focused two hour sessions to get more accomplished.)

The next session was about setting the vision, mission, values, objectives and strategy and then the client went away to do their fieldwork.

The next session was to review the outcomes of the fieldwork and to continue to make additional plans.

The next session began with a review from the previous session and then focused on partnering and networking. Then the fieldwork, and then the next session to review.

This process continued for all the environments in the order listed in the Business Wheel of Life (although we certainly could have moved them around based on various priorities). Every session started with a review of all previous action plans, so each session's introduction review period also got a bit longer, and we always set a cap of 30 minutes.

Outcomes

The client achieved numerous milestones and objectives, some of which are listed below:

- Developed an overall vision and mission statement
- Defined personal, professional and business values
- Created a “Living Business Plan” which was updated every Friday as a new business habit.
- Joined two very different networking groups; one for professional development with colleagues and the other for business development
- Created a “Networking to Give” strategy
- Developed numerous marketing materials including biography, product brochures and a website (total time was two months)
- Wrote a variety of email and letter templates for introduction, confirmation of appointments, follow-through, birthdays, etc.
- Hired a bookkeeper to set up accounts and simple work instructions on how to develop daily habits
- Hired a professional organiser to come in and sort out the office and filing structure
- Created a one-hour admin time at the start and finish of every day, and most days didn’t require the full hour as habits improved
- Spent two hours per week researching on the internet business and competition related information as well as professional development
- Slowed down on the number of courses being taken and focused instead on projects to implement the learning from that had already been taken.
- Maintained a once a week call with a colleague in the same industry to freely share information and support each other
- Developed a number of customer surveys which helped to redesign a number of processes. It also increased customer retention and testimonials.
- Held a part to thank all the various stakeholders who had been a part of launching the business and/or supporting the client. As a result, all of the stakeholders but one decided to help in bigger ways than before. Also the partner and family members became more involved and were “proud” (client’s word) of the client.
- Received an industry award for their pro bono work in a specific community sector.

At the end of working together, we completed another Business Wheel of Life assessment, the results of which are shown on the next page.

| Environment | SP | PP | NP | RP | IP |
|--|-----------|-----------|-----------|-----------|-----------|
| Vision, Mission, Values, Objectives and Strategy | 8 | 8 | 1 | 10 | 10 |
| Partnering and Networking | 9 | 9 | 2 | 9 | 10 |
| Marketing and Promotion | 10 | 10 | 10 | 8 | 10 |
| Service Delivery | 9 | 9 | 1 | 10 | 10 |
| Systems and Administration | 7 | 9 | 2 | 9 | 9 |
| Researching | 9 | 8 | 1 | 10 | 10 |
| Training, Feedback and Sharing Knowledge | 10 | 10 | 2 | 10 | 10 |
| Continuous Improvement, People, Process and Technology | 8 | 9 | 1 | 8 | 9 |
| Team Ownership | 9 | 10 | 2 | 10 | 10 |
| Social Responsibility | 10 | 10 | 0 | 10 | 10 |

Contacts

To discuss your ongoing development needs and/or any questions, please contact Noel Posus, Director and Master Coach for Incredible Awareness, which The Wheels of Life service is a part of.

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