

COMPANY PROFILE

- Healthcare Consultant, Agent, Third-Party Administrator
- \$1.5 million in annual sales
- Cincinnati based
- Services individual members and companies
- 20 employees

PROBLEM

The owners felt that the company was moving into a period of potentially significant growth. But they also felt that they needed a thorough knowledge of skill gaps and employee relationship issues within the company in order to realize that potential for growth.



SOLUTION

The owners contracted with Laurie to coach the owners and key team members in order to improve the company's ability to take advantage of future growth opportunities.

Initially, Laurie and the owners identified several personal and business goals that they wanted to accomplish:

- Define the overall company objectives and the kind of culture that the owners would like to have.
- Position the company for future growth by securing foundational elements within the company.
- Understand the strengths and the opportunities for growth among the owners and employees.
- Make the hiring process more deliberate in order to "get the right people on the bus."
- Help the sales and operations teams understand the impact their actions have on each other's departments, on customers, and on the company's bottom line.

Next, Laurie held regular individual coaching sessions to determine the competencies and skill gaps within the company and the extent to which employees were growing as individual leaders. She also held team facilitation sessions to assess how well employees and teams worked together in supporting the growth of the business.

OUTCOMES >>

CASE STUDY

Business and personal coaching to align company owners and their team, enabling them to take advantage of growth opportunities in the marketplace.

"We hired Laurie to be our personal coach in 2011 and then again in 2013. She has helped us understand our skill sets as owners, as well as our employees' skill sets. We reviewed our culture and began developing a plan for our company that empowers our employees and gives us more flexibility.

Laurie was great at explaining, in simple terms, the things we should be thinking about for our organization. In working with her, we have been able to determine our objectives, examine placement of our employees, and most importantly, identify our culture.

Even though we have been in business for ten years, Laurie helped us take a broad look at what we were doing, which facilitated us thinking about things we hadn't looked at before. Her knowledge of business and advice on internal issues has been extremely helpful to us in continuing to build our business. Working with Laurie is helping us get to the next level."

-Owner



Outcomes

Through this process, Laurie was able to provide important feedback to the owners—and the employees—about the way their company functions and ways they can expand its potential for growth. This had several positive effects.

- The owners gained clarity about the day-to-day activities that truly needed their attention versus those that could be delegated to others in the company.
- The owners began to define the culture that they wanted to have, as opposed to simply living with the culture that had developed during the startup phase of the company.
- The owners came to understand the importance of providing employees with the skills necessary to do their jobs, enabling them to work independently and creatively.
- The employees became more motivated to become a part of the growth plan and to gain the right to make decisions independently.
- Key managers communicated more effectively with, and got better results from, their staff members.
- The entire company learned about the impact—positive or negative—that a team or an individual can have on other stakeholders, and about the correspondingly potential for collaboration among the teams.
- The entire company began working as a team to align goals and objectives in a conscious effort to grow the bottom line.
- Sales increased by 25% in the first year of coaching and are projected to increase by 35% for the next two years.

“Laurie’s ideas have helped us tremendously, not only with increasing sales but with keeping our employees motivated. I would highly recommend her.”

-Owner