



Improving Individual and
Organizational Performance

Norm Gauthier
508-923-0918

norman.gauthier@heritagehillpartners.com



Customer Case Study

Client / Organization

➔ Executive Coaching - Non-Profit

The Challenge:

The CFO of a not for profit company left the company at a critical time. The company had been developing an enabling technology, which they planned to introduce as a profit driven part of their business. Due to the sensitive nature of such an investment, the CFO was one of the restricted group of key contributors from the executive team which had been working on the strategy since its inception. As a result, very little information was able to be shared with people in the finance organization. And, since the CFO had not developed a successor as a priority, there was no one who could step in to fill the void. The Director of Finance had been hired by the exiting CFO less than a year earlier with the expressed expectation that he was being hired as the CFO's successor. The President of the company was confident in the Director's ability, but struggled with the thought that he was not seasoned enough at that point to take on the leadership role, especially with the additional demands of the for profit strategy, which was viewed by the Board of Directors as a critical path objective. With considerable thought and counsel from the board and others, he decided to move forward with a conditional plan to promote the Director based on demonstrated performance and commitment to a development plan.

Solution Milestones:

- We were hired to develop a plan for approval by the President to assess and recommend actions to prepare the Director to immediately begin to take on greater responsibility with support for promotional consideration within the year.
- Initial evaluation of overall performance and leadership characteristics were conducted along with a restricted 360 feedback assessment based on organizational considerations as specified by the V.P. of Human Resources in collaboration with the President.
- The evaluation included the development of a Job Description for the CFO position to set a benchmark for the key performance requirements of this changing position, approved by the President.
- Recommendations included confirmation of MBA educational course work in progress, observation and one-to-one coaching primarily focused on leadership development and business acumen.
- Periodic evaluation of progress between, individual, President and coach against position requirements were conducted with feedback incorporated into performance coaching. Feedback and recommendations from coach were provided as a supplement to a parallel mentoring process between President and Director, to strengthen and build their ongoing relationship.

Results/Outcomes:

- ▶ Performance exceeded expectations, which included earlier than expected involvement and contribution by Director in the, for profit venture and promotion to CFO within the year. Early demonstration of increased confidence and presence in communicating at the board level was a key accomplishment.