



Inflection Point Coaching

Helping Leaders align passion to purpose!

Coaching Case Study:

From Team Lead to Director

The Background

- The organization: Finance and Revenue Cycle Department in Healthcare System
- The Coachee: New Director who rose quickly to role

The Challenge

- Coachee rose through 4 levels to Director in just 2 years
- Manages former peers with differing levels of accountability
- Enormous amount of change in the department
- Coachee is still doing work that could be delegated
- Lack of work-life balance

The Objective

- Set boundaries in new role to regain balance and wellbeing
- Let go of work that should be done by team members
- Explore effective methods for accountability and performance of team
- Understand the right questions to ask rather than knowing every detail of teams' work

The Coaching Engagement

- Built self-awareness using DiSC and Motivators assessment to understand personality preferences, intrinsic motivations, impact to team members
- Role-played crucial conversations and responses to executive questions that arise in meetings
- Discussed and practiced interactions with senior level colleagues to mitigate emotional reactions
- Created matrix to focus on critical initiatives and meetings

The Outcome

- Coachee freed up calendar to strategize and focus on talent
- Coachee delegated tasks and coached team for success and accountability
- Coachee regained balance between work and home and increased wellbeing

Build