

# PSFI's coaching practice

Creating lasting transformational change, across individuals, teams and organisations.

# Where the rubber hits the road

Thank you for this opportunity to share our credentials.

Coaching is where the 'rubber hits the road': it's about individuals and teams working through what they want and need to achieve, the challenges of getting there, and how to actually create change on the ground.

We offer coaching to individuals both as an integral part of our programmes, and as a self-standing service. We also have a deep expertise in coaching teams and helping you building your own internal coaching capability.

Whichever form it takes, our coaching work helps to create deep and lasting transformational change, across individuals, teams and organisations.

This presentation covers each of our coaching services and includes recent client examples. We would be happy to expand on any aspect of this content, and to engage in conversation with you on how we could best support your coaching needs and aspirations.



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Jason works with clients at different levels to help them unlock their potential, drawing on his experience of having worked in the world's leading management consultancy and investment banking firms. He works at three levels: coaching individuals, supporting teams and on systemic and organisational issues including culture and leadership.

2009

We formed as an independent firm, partly owned by The Møller Centre at Churchill College, University of Cambridge.

2018

We spun out of Møller and changed our name to PSFI to take complete control and ownership of the firm.

2022

On 1 January 2022 we became PSFI LLP to create a stable and sustainable platform for growth and to align ourselves more closely with our clients.

# Why choose PSFI coaching

## PROFESSIONAL

1

All our coaches are professionally coach trained, accredited with a coaching body, in a supervision relationship and have over 500 hours of coaching experience

## EXPERTISE

2

All of our coaches are highly experienced with backgrounds in business and management at some of the world's leading organisations.

## TRANSFORMATIONAL

3

Our clients, many of whom have been with us for more than 20 years, say our coaches have made a positive difference, transforming individuals and teams.

# Meet your coaching team

We have coaches in the key regions of the world who are also used to working digitally. All our coaches are professionally coach trained, accredited with a coaching body, in a supervision relationship, have over 500 hours of coaching experience and work regularly in professional and financial services.



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# Our philosophy of executive coaching

Our philosophy builds on the ICF definition of coaching: we believe that executive coaching involves partnering with clients in a thought-provoking, creative but pragmatic process that inspires them to maximize their personal and professional potential.

Below we expand on what we mean by each of these terms

## Thought provoking & insightful

Our process helps generate new ways of thinking which often go way beyond the issue in question and can apply to many situations, even life in general. We frequently hear ‘wow, that made me think!’ – and it’s invariably the quality of the questions posed by our coaches that stimulate this positive response.

## Creative & inspiring

As well as being thought provoking, our coaching process is creative as it gives birth to new insights, ways of thinking, seeing and being that are novel. It’s also creative as it doesn’t follow a set path – our coaching doesn’t have a set curriculum or structure, but follows the needs and interests of the coachee. Literally, coach and coachee create something together that never existed before. This aspect – more or less creating or authoring one’s own future - can be hugely enlivening and stimulating. Coachees are motivated about the possibilities that emerge and are moved to make their own choices about what to change and do differently.

## Partnering

Coach and coachee engage together as peers – not as teacher and pupil. So although our coaches naturally bring their experience and expertise to the process, the relationship is not based on a power differential between the two. The coachee engages as a willing participant, and our coach plays the role of supportive partner.

## Maximising potential

Maximising potential is a crucial aspect of our coaching – it implies that we all have latent capacity and capabilities inside us. We help clients to tap into these and use them to their best ability and enable them to bring all they can into their organisations and the world more broadly.

## Personal & professional

Although we work in professional contexts and the aim of coaching is aimed at enhancing individual performance, our coaches always work with the whole person, attending to intellectual, mental, emotional and physical needs wherever these arise (always within the boundaries set by the coachee).

## Pragmatic

The belief that people have the resources to generate their own solutions is core to our philosophy of coaching. For some, coaches should only ever listen and ask questions, and not veer into giving advice or recommendations. However, at PSFI we are pragmatic about our coaching process where the expertise and lived experience of our coaches can be incredibly valuable to coachees at certain points in the process.

## Our hallmark

The hallmark of our approach is relationality: we believe that the quality of the relationship between coach and coachee is fundamental to the success of coaching, and that paying attention in real time to what is happening in the coaching room can be one of the most powerful sources of learning. The concomitant skills and human qualities that all our coaches possess are self-awareness, empathy, mindful attention, listening, compassion, and courage.

When done well, we believe coaching can bring a whole host of benefits including increasing personal effectiveness, building stronger client relationships, creating ownership and responsibility in team members, delivering higher levels of engagement, enabling innovation, leveraging diversity and harnessing the performance and potential of the business.



# Executive coaching for senior executives

The benefits of coaching can be truly transformative. We know what a powerful development tool coaching can be to the individual, to the firm and the firm's management and we help unlock all of these benefits to you. Three elements are essential to ensuring that individual coaching works well:



1

## Matching

We help our clients to select coaches most closely matched to the assignment requirements. Our coaches then take part in a discovery or 'chemistry' meeting so that the individual is able to make an active choice regarding who to work with. This ensures there is a good match and both parties are confident in and committed to the coaching relationship.

2

## Contracting

We ensure that stakeholders are identified and agree expectations, deliverables and boundaries. We also contract with our clients on an overall assignment and session by session basis to ensure our work stays in alignment.

3

## Evaluation and review

As part of the contracting we agree how, when and who will be involved in reviewing the effectiveness of the coaching and the outcomes achieved. There are four potential elements to this, and we work with our clients to agree what is appropriate with the client (what they believe they have achieved); the coach-client relationship (how we have worked together); the client and their stakeholders (what changes have been noticed); the organization (themes and patterns from multiple coaching assignments).

# Recent examples of coaching senior executives



## Transforming as a leader

A partner at a consulting firm aspired to create a new, more inclusive culture in his office and challenge himself to develop as a transformational leader.

Over the course of two years, a PSFI coach supported him, providing appropriate challenge where needed and empathy and motivation when times were tough. Starting with an in-depth 360 review and psychometrics, we helped the partner create an inspirational vision for the culture of his office – and the leadership role he would play in helping to create this. This required leaving behind aspects of what had previously made him successful and courageously embracing new ways of thinking, behaving and being.

He is now head of the office, which has become a role model in the broader global organisation for its culture that skilfully balances commercial performance with honest and heartfelt humanity.



## Coaching a new Senior Partner

A new Senior Partner at a multinational law firm was elected on a clear platform of strategic and cultural change for their firm, and wanted to ensure that they addressed this leadership challenge in the most effective way.

PSFI supported him through parallel streams of executive coaching and mentoring. The coaching process was focused on enhancing and broadening his leadership style, both with the broader population and with his senior team (supervisory board), whereas the mentoring - conducted by a senior executive with experience in the C-Suite and boardroom - worked on issues of governance and Board effectiveness.

These processes were carefully coordinated, and the combination helped rapidly accelerated the Senior Partner's impact and landing his agenda.



# Coaching surgeries



We also offer coaching surgeries which are a cost and time-effective way of introducing coaching to an organisation and allowing broader access to external coaching capability.

Surgeries involve an executive coach spending one or two days per month (online or at the client's premises), offering pre-bookable coaching slots, generally 1-1.5 hours duration.

Topics would be at the choice of the potential coachees and may range from the very pragmatic to the more personal. Example of common topics include preparing for challenging client discussions, building team leadership skills, balancing competing priorities as a senior leader, creating business plans, rehearsing presentations, enhancing relationships and reflecting on work/life balance and career trajectory.

The coaching would be completely confidential and would either serve as a support option for dealing with specific challenges or as a “teaser” to encourage participants to consider ongoing coaching, if appropriate and agreed by the client.

Themes that emerge across surgeries can be useful to inform broader development programmes and other interventions

# Executive coaching as part of a development programme



We offer individual coaching as part of many of our development programmes, whether these are focused on skills around leadership, client development, strategy execution or other areas. Coaching creates a confidential space for the participants to set personal goals for the programme. It is where they plan to apply what they have learned to their clients, develop skills and experiment with new behaviours. Feedback highlighted how highly valued this relationship and space is by those on related programmes.

If coaching is an optional element, we first identify participants who want to be coached. We appoint a “lead coach” who talks to each participant to identify their needs and agenda. Participants are then matched with a coach. If the match does not work then they are offered an alternative. The coach will arrange 3-6 (to be agreed), 90-minute sessions (or the equivalent in time) with the participant. In the case of 6 sessions, a review is held at the third session to establish the progress made and whether the second half of coaching should continue.

While the specifics of all coaching discussions remain confidential, at different points in the engagement a summary of the main themes will be captured and fed into the team on a non-attributable basis. This provides good feedback on ROI, the ability to adjust the programme to the participants and important insights for the sponsors about the firm and programme.

# Recent examples of coaching as part of a development programme



## Developing as clients' trusted advisors

The investment banking arm of a major multinational bank wanted to build out the trusted advisor capabilities of its senior relationship bankers. PSFI worked with the client to design and deliver a year-long development programme including workshops on core skills (such as listening & empathy and cross-selling), mentoring sessions with senior leaders and live practice with our client executives. (Our client executives are experienced Board members, C-suite executives and buyers of professional services from many industries from around the globe. They create a realistic, safe and stretching space to rehearse critical conversations and try out different approaches.)

A key element of the programme was executive coaching, with six sessions offered to all participants; this created a confidential environment for the MDs to explore the personal aspects of the changes needed from them, including confidence, imposter syndrome, deepening relationships and influencing with integrity.

The balance of individual development with group learning and dialogue proved a powerful combination in shifting the dial on client relationships and business development.



## Building leadership capability in Private Equity

One of the key players in the international private equity industry recognised that leadership capability was becoming an increasingly critical differentiator in both performance and talent retention.

PSFI embarked on an in-depth exploratory phase with the client to explore the organisational culture and specific leadership capability requirements, and developed a programme for the cohort of senior partners reporting to the ExCo.

Individual executive coaching was a key part of the approach; the exploratory phase had indicated that it was critical that participants had a safe space to contemplate and address knotty political challenges, which was not always fully possible in the full group.

The coaching process helped build the resolve, skills and confidence of the partners to engage effectively with each other, the organisation and ExCo, with a clear impact on the quality of the culture.



# Team coaching

Team coaching is a relatively new and evolving activity, which harnesses the transformational power of coaching to improve team performance, leading to organisational change. Our team coaches have a unique combination of business acumen, coaching skill, expertise in team dynamics, and building trust (see figure on this page).

Team coaching takes a systemic perspective on all aspects of the team and its environment. It focuses on both the team's external environment and stakeholders (e.g. firm leadership, the client, competitors) and its internal context (the makeup of the team and how it works together). At the same time, it takes into account both 'task' - what the team is there to do and what success looks like; and 'process' - what it does, how it interacts internally and with its stakeholders. Lastly, team coaching focuses on learning: how the team can take a perspective on how effectively it is operating and integrate lessons learned into its ongoing approach.

As with individual executive coaching, there is no set order or priority to how and when these different focus areas are addressed – whatever feels most relevant and appropriate at each point in time is where the focus and energy will be directed.

Team coaching seeks to transform:

- ◆ **The leadership of Leaders** – by exploring their role, contribution and style in a team context
- ◆ **Leaders as team members** – by improving their relationships and roles in a team context in order that they maximise their contribution
- ◆ **The organisation** – by looking at how the team can most positively impact the broader system in which the team operates



# Recent examples of team coaching



## Forging a powerful new executive team

A leading global insurance company was facing the challenge of a new business unit being formed by merging previously separate country organisations.

The new leadership team was struggling to work together, with a lack of clarity about their role and mutual suspicions about intentions. We worked with them to create a truly unified team with a core purpose, clear roles, effective processes and most importantly, high levels of trust, mutual support and challenge. Initial success came from enabling the team members to connect at a deeper personal level.

Over the last two and a half years we have supported them through the challenges of the pandemic, focusing on supporting staff in a caring way and through a CEO transition. Team members remark that this is by far the best team they have ever been part of.



## Coaching a team of practice heads

A newly formed team of Practice Heads wanted to improve how they worked together during strategy and planning meetings.

The team completed a diagnostic which was used as a framework for giving and receiving feedback about how they worked with each other.

Through observation and team coaching the Practice Heads reached a new level of awareness about how they could improve the way they communicated and made decisions during the meetings.



# Coaching advisory

Beyond providing individual and team coaching, we can support you on wide range of coaching-related activities, including creating a coaching strategy, building internal coaching capability, providing supervision for individuals and groups, and building a coaching culture.



1

## Building coaching capability

We work with clients to support them in building their own internal coaching capabilities, including building a business case. Different models exist, including recruiting a pool of professional, full time coaches or training a group of managers in coaching skills who then coach part time in addition to their day jobs. We also work to develop a coaching style of leadership in executives, which has been shown to improve motivation, engagement and performance.

2

## Coaching consultancy and strategy

We collaborate with clients to explore their current and future coaching strategy. This involves:

- ◆ Ensuring coaching strategy supports business strategy
- ◆ Integrating coaching with other L&D activities
- ◆ Auditing current coaching provision, assessing cost, impact and ROI
- ◆ Assessment and selection of external coaches
- ◆ Ensuring that internal and external coaches are undergoing appropriate supervision
- ◆ Designing processes for deployment of coaching
- ◆ Building a coaching culture

3

## Supervision

An essential activity for all coaches, internal or external. Its aim is to ensure that coaches meet professional standards, continue to build their capabilities, and have access to appropriate development resources. We provide supervision for individual coaches (whether internal or external), group supervision, and supervision of managers leading internal coaching initiatives. Following best practice, all our supervision activities have the following aims: **formative**: to enable continuous professional development and, in groups, mutual learning; **restorative**: to create a space to reflect, renew and regain energy; **normative**: providing guidance on professional standards, ethics, boundaries and other quality related issues.

# Recent examples of our coaching advisory work



## Creating a powerful coaching capability

A global universal bank had the vision of 'democratising coaching', through the development of a coaching culture and a cadre of committed internal coaches.

The internal coaches – who coach in addition to their 'day job' – are required to take a formal coaching qualification and participate in ongoing professional development activities.

Our role has been to shape and implement the supervision element for these coaches, providing individual and group supervision on a regular basis. Supervision involves assuring quality standards in the coaching provided, learning from best practice and in community, and providing practical and empathetic support for what can be quite an emotionally demanding activity.

The cadre of coaches is growing quickly, as employees who have experienced the power of coaching decide to train as coaches themselves. The coaching culture goes from strength to strength



## Strategic review of coaching

An international law firm had been using executive coaching for some time, but was unclear about the value added and whether it was taking the right approach.

PSFI worked with the Head of Learning & Development and their team to do a strategic review of coaching in the firm, including usage, costs, decision making, policies and outcomes - a major result of which was that there needed to be a far more disciplined and organised approach.

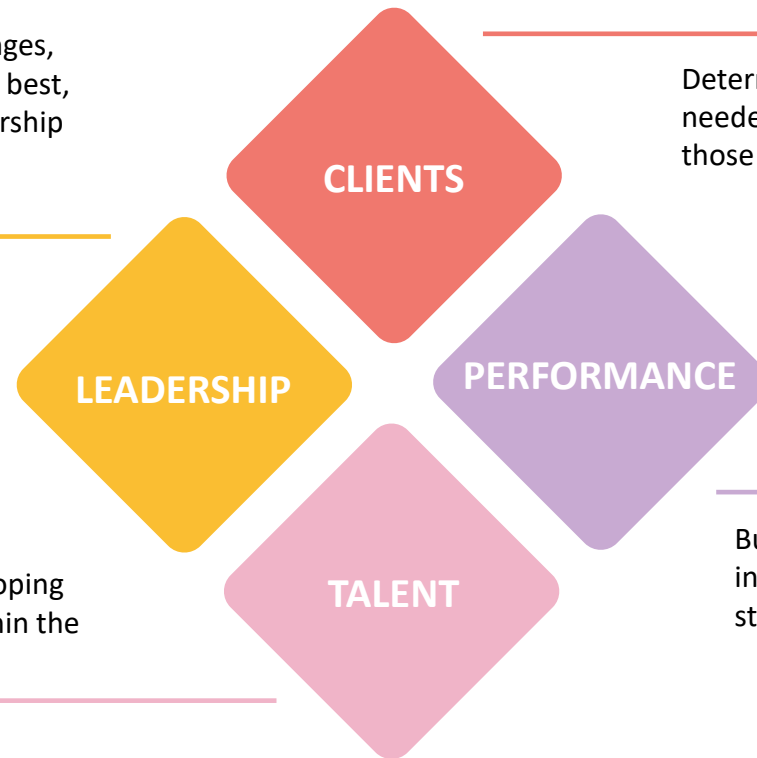
The next step was developing a coherent strategy covering target populations, developing an internal coaching capability including supervision, a clear deployment policy, building a focused pool of external coaching, and consistent measuring of return on investment.



# The coaching practice in context

The coaching practice is just one area of expertise and focus. Working with our clients to drive value and purpose in their organisation we also support them on:

Supporting leaders on their most complex challenges, from helping the Board and Exec function at their best, to advising on governance reviews, shaping leadership elections, building leadership bench strength and navigating complicated transitions.



Determining which clients to focus on, the structures needed to service them and the attitude and skills of those leading relationships.

Promoting, attracting, retaining, developing and supporting the key transitions within the lifecycle of partnership.

Building the disciplines, skills and structures to increase business performance and the return to stakeholders in the business

# Getting to know PSFI: our purpose and values

Our core purpose and our values sit at the heart of all we do, the clients we choose to work with, the way we help and support each other and the way we choose to grow our business.

Like many firms we have spent time over the last year reflecting and refining our purpose and our values. We care deeply about our clients, placing the highest possible value on our relationships with them. We focus on building and sustaining authentic relationships with the organisations and leaders we work with. To achieve this, we are generous with our time, stay human and are easy to work with.

## Our Purpose

To help professionals and their organisations solve their toughest problems, build thriving cultures and deliver sustainable value.

## Collaborative

We work in a co-creative way alongside our clients, recognising that the best solutions come from our collective spark. We are collaborative, generous and supportive with our clients and with each other.

## Curious

We are constantly evolving and learning and are never content with obvious explanations or easy solutions. We favour a growth mindset and relish working with emergence, complexity and ambiguity.

## Challenging

We are 'fierce friends' and challenge our clients to be the best they can be. We do not shy away from saying what needs to be said in order to improve performance. And we challenge ourselves to grow and reach our potential.

## Committed

We care about the success of our clients. We focus on building and sustaining authentic relationships with our clients and pull out all the stops to deliver what we promise. We are committed to helping build inspirational leadership and sustainable cultures (including our own) that create personal fulfilment and make a valuable contribution to the world.

## Commercially Minded Experts

We value our deep experience of working at senior levels in high performing professional organisations. We balance rigorous thinking and evidence-based best practice with a commercial mindset, pragmatic lightness of touch and a spirit of humility. We understand what it takes to shift behaviour and change performance for transformation that lasts.

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Understanding that professional and financial services firms are all different, we take an expertly nuanced view, underpinned by decades of experience to be able to work alongside leaders of professional and financial services organisations to bring transformational change.

Our clients, many of whom have been with us for more than 20 years, trust us to support them on their most complex issues around business & leadership strategies, senior people capabilities, and strategic decision-making.

We are building an independent, international, and diverse organisational development and leadership consultancy to help you access, navigate, understand and apply the most relevant leading edge thinking and research to help your business grow. We offer evidence-based thinking combined with years of hands-on experience and tailor our work and advice to suit each client's needs.

Above all we care deeply about our clients, placing the highest possible value on our relationships with you, balancing warmth and support with curiosity, insight and challenge to get to the heart of the issue so we can help you make a real and lasting improvement to your business.