

Case Study #2 – Leadership Development Program

Title: Driving Performance and Retention through Coaching and Talent Advising

Context

Audience: Interns through Partners

Business Challenge: The firm, like many others, was experiencing common issues of a growing professional services firm – balancing performance expectations with employee development and retention. Associates needed clearer guidance on progression, while leadership required better visibility into talent readiness and risks. The opportunity was to create a more structured, coaching-driven approach to performance and career development without adding unnecessary time or administrative duties in an already demanding environment.

Role

As a consultant, I served as a coach and trusted advisor to over thirty individuals, ranging from Interns through Partners. This included having career conversations, developing personal goals and facilitating ongoing sessions between individuals and their managers. I also aligned with Executive Management to develop performance management and succession planning, including 9-box ratings, career ladders and quarterly reviews.

Approach

1. Built Trust Through Consistency
 - a. Established regular one-on-one check-ins with coachees
 - b. Created a safe, but accountable, environment for performance conversations
 - c. Balanced support with direct feedback
2. Structured Performance Conversations
 - a. Introduced more intentional quarterly review discussions
 - b. Ensured alignment with:
 - i. Employee goals
 - ii. Manager expectations
 - iii. Firm standards
3. Integrated Talent Evaluation
 - a. Assessed both performance and potential with 9-box ratings
 - b. Partnered with Executive Management to calibrate talent across teams
 - c. Identified high-potential employees to develop additional plans

Outcomes

- By working with all levels throughout this process, engagement and ownership increased due to clarity and understanding of expectations
- Time for annual performance reviews went down by over 50%, saving time and allowing for more billable work
- Associates were able to understand their career progression in the firm and create realistic, tangible goals for the upcoming year to continue developing
- Standardization of performance reviews led to a clearer and more consistent approach, aligning employee ratings with promotions, salary increases and bonuses

Reflection

What Worked Well

- Consistent coaching with associates built trust and allowed them to have a safe outlet to discuss opportunities, challenges and future goals
- Collaborating with both associates and their managers opened up better lines of communication, encouraging honest thoughts and helping managers to think more like leaders

What I Would Refine

- Incorporate more formal measurement of coaching outcomes to show impact
- Extend the program to all employees of the firm