

Creating a coaching and mentoring culture.

Client - St. James's Place Wealth

Sector - Financial Services

Type of business - Financial Planning

Numbers

- 169 leaders coached and trained, and a coaching culture started
- 3000% ROI

Location - UK and Singapore

Challenge

How do you create a coaching and mentoring culture and get high impact behavioural change to stick across a diverse group of experienced managers and leaders? And then add the COVID 19 crisis into the mix...

Arema had previously worked with a talented group of managers at St. James's Place Wealth (SJP) to build an advanced coaching and mentoring competency, in support of an identified key development need across one area of the business.

This was so successful that other parts of the business started to notice, so more managers and leaders were trained and accredited. The recognised value grew again, but this time the answer was not simply to train and accredit more and more; instead it was to raise the ambition

levels to create a true coaching culture across the business.

SJP provides regulated financial advice to a quarter of a million clients in the UK, through a network of Partners and financial advisers.

The SJP model is all about building relationships. Partners and their advisors develop deep personal relationship with their clients. These Partners are in turn support by a group of Partner Development Managers (PDMs). Their role is to support Partners to grow their businesses, assure compliance and to develop Partners individually. The London and South East



Leadership Team who Arema worked with extensively had identified coaching and mentoring as a fundamental skill for PDMs to support their Partners.

Many of these managers had attended coaching courses in the past, but few had actually used

the skills, so the value of the training had been missed.

SJP wanted Arema to build them a programme that was not just another training course but truly embed what they had learnt so it became part of their DNA, and included a qualification to set a benchmark for excellence.

SJP's vision is to

“Have the best equipped, best trained, best supported, most impactful management team in the industry”.

Solution

A powerful learning and accreditation journey.

Arema are experts in training managers and leaders to be great at doing and being coaches and mentors.

Over 90% of leaders say this is one of the most critical capabilities in today's world. Yet only 5% of the UK leadership population have any accreditation-based training in such a complex and EQ rich skill. Most people just do a few hours training on a coaching model and hope that they will do some application. Just ask those leaders how good their leaders are at coaching them and it is likely that less than 20% will say their leaders are good coaches.

Leaders are generally good at telling people what to do and how to get better. Arema coach people to understand what it means to sit and be a coach with someone and how to be present in a position which is conscious and neutral. In reality this can be tough for leaders.

So, in the traditional coaching sense it is often seen as non-directional, yet it also has to be directional. It needs backbone, and it needs

practice to help change managerial and leadership behaviours.

Over the last 12 years we have learnt that the real difference is made through accountable application of learning and making it progressive, bite-sized, with cycles of input, reflection, theory, and practice.

Make learning bite-sized

The programme delivered by Arema usually consists of over 54 hours of quality guided learning, and awards leaders with the Institute of Leadership Management (ILM) Level 5 or 7 certification or diploma in effective coaching and mentoring, within the organisational context. The learning is broken down into bite-sized experiences - with focused world class input, learning practice, observed feedback and applied learning assignments.



The key difference with this style of coaching and mentoring training is that the theory is not just taught, but it is embedded through a sustained period of doing and being a coach.

“It works wonderfully well with many saying that short 2 hours sessions focusing on one element of coaching has given delegates the knowledge and then allows practice to take place. It also allows many to reflect and relate the content to what they are delivering on a day to day basis. I truly believe this format allows for more diverse attendance and greater knowledge transfer and embedding.” Quote from Tracey Smart, Head of People Development.

The 3 core elements are outlined below.

1. **Guided learning.** 12 masterclasses run over 32 weeks. This allows an exploration of coaching and the time for people to recognise how they could use this personally. During this phase they practice coaching each other in a safe space and are required to complete a formal written assignment on coaching.
2. **Formal Coaching.** The second element includes 18 hours of formal coaching with 2 -3 coachees. This includes formally agreeing and verifying goals through powerful contracting. This skill, and perceived value, is often missing and leaders are supported in agreeing how you are going to work together, setting the expectations and aligning goals right from the start.
3. **Evaluation and case study.** The third element is a written reflective assignment which includes evaluation of the coaching they have done in their workplace and presenting one example of return on investment.

Attendance on the training course was simply not enough. Follow up, peer observed practice, and personal study permission was also necessary so the skills could be used regularly and embedded. Monthly ILM tutorial sessions followed closely after each masterclass for the group, to support peer accountability and learning. This resulted in an average ‘immediate’ return on investment of 3000%, alongside many enormously proud graduating learners.

“It was hands down the best learning programme/journey I’ve experienced, and the assignments just further embedded the learning.” Quote from course attendee.

Qualification and more

The course is run to achieve an ILM vocational qualification, which maximises learning value and has a long-lasting impact. It also gives people a goal to work to and greater sense of achievement, meaning they are more likely to invest time and energy into the course.

Creating Champions

Arema also established peer supervisors (previous ILM graduates) to support with each group taking the course.



Results

A transformational journey and over 3000% ROI (and that's just the journey so far)

Arema delivered more than just a coaching programme, they realign the culture and leadership style of the business.

They taught leaders how to coach and be a mentor too. So that leaders gave their teams the time and attention they needed. They listened, helped those they worked with developed solutions and pointed them in the right direction when needed. And it built that all important thing, it built connections, it strengthened relationships, which increased trust and builds resilience.

And in this world of COVID-19 where people are having to work apart nothing could be more important to the success of a business than trust, good relationships and resilience.

The delivery and expertise of the trainer was rated 4.9 out of 5 across the board.

“Andy's style, delivery and expertise are first class. He creates the perfect environment to make us all feel safe, which makes us all willing to share and bring our whole selves to the sessions.” Quote from course attendee about Andy Maggs coach and trainer at Arema.

The impact of learnings so far, was rated on average as 9.44 (1 low - 10 considerable).

The training didn't just tick the coaching box. It had far reaching benefits across the business. Supporting many of the key development themes for PDMs which the business had identified and are listed below.

1. Personal Effectiveness
2. Impactful Relationships
3. Listening and Influencing Skills
4. Enacted coaching capability
5. Maximizing performance impact

The importance of a qualification

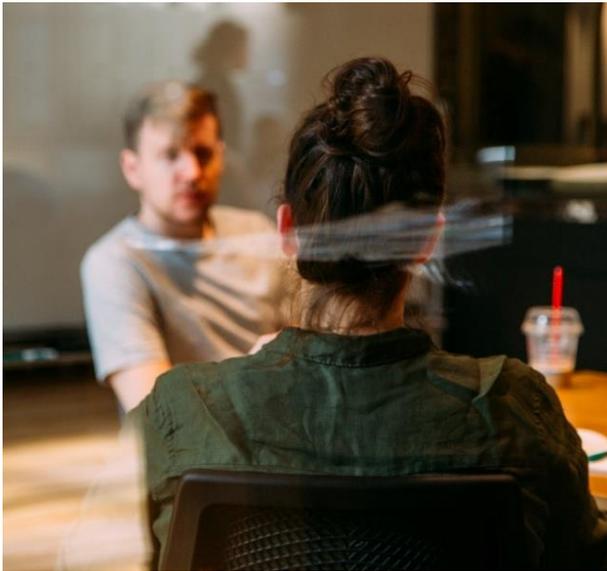
Hitting ILM level 5 gave the PDMs a huge amount of credibility, especially with Partners. Partners are very successful business owners in their own right and it is a huge benefit to the relationship when PDMs can say I'm a qualified coach, it gives new value to the relationship.

“We set ILM Level 5 as the standard of excellence. The higher standard has helped managers re-define the relationship with their Partners and the business, creating a culture synonymous with performance. Performance not just in term of business objectives but in terms of improving as an individual.” Oliver Stokes MBE, Head of People Development, London & South East Hub, SJP.

Personal effectiveness has increased, the course has increased the ability of the managers to focus and concentrate on the matter at hand. Allowing them to slow down if needed to ensure

they are spending their time impactfully.

“It’s easy to forget the joy of learning. Muscles get atrophied. Now we see managers buzzing with pride. Level 5 meant skin in the game. Now we have these learning muscles going we can build on it and build a learning culture where people are personally invested in getting better.” Oliver Stokes MBE, Head of People Development, London & South East Hub SJP.



Coaching within the business

There is no shortage of research which supports that effective coaching enables personal growth both for the coach and coachee alike. Self-management has improved within the group as has self-awareness and awareness of others.

“The leaders are happier and more fulfilled, its less of a transactional model.” Oliver Stokes MBE, Head of People Development, London & South East Hub SJP

Teamwork and Impactful Relationships

Relationship management is the number one skill these leaders need. And through the training they learnt the importance of listening and asking powerful questions.

It has created a leadership community; the best team building is to learn a skill together. The course has had a massive effect on teamwork within this group but has also created a real team spirit within the organisation.

Understanding and knowledge of Partner services

Coaching helped build unintended relationships and greater understanding within the business as these leaders had to coach people, they previously didn’t know in other areas of the business. This makes for a much more connected and resilient business because of this.

Why coaching works for a Partnership model.

Learning the skills of coaching and networking was key for this group as they are senior professionals who manage Partners who are themselves business owners in their own right. In a Partnership model coaching and mentoring is a perfect way to build a successful relationship.

“Coaching is now embedded in the management tool set. And through coaching we can provide a psychological safe space for the leaders so they can support. Coaching is much more inclusive than just telling, the culture feels better in the team. Faith in leadership, enjoyment and satisfaction across every measure was up. It has helped to delete silos and barriers to relationships.” Oliver Stokes MBE, Head of People Development, London & South East Hub SJP.

One leader was a complete sceptic about coaching, yet after having undergone the process it changed his life completely, it shifted the way he worked.

“I was a real sceptic when I started the course, I’d done coaching classes before, there were some great ideas, but I just didn’t use what I learnt at all. This

course was different, what this course did was get people doing. You were encouraged to try these things out, carry out live coaching. There was no escape from putting it in to action, as you were working towards a qualification. It was truly enlightening. And the results were amazing." Eddie Clark PDM.

Change needs role models

When the training was first run, ILM accreditation was optional and not really role modelled by senior leadership. Only 12% took the accreditation. However, when the London and South East executive leadership got behind the programme, completed it themselves and role modelled it, things really shifted. They showed a willingness to be vulnerable and learn to be better coaches in practice, alongside adding it to the personal development goals for every manager in the business, the graduation rates shot up. Showing the importance of leadership backing and accountability, now it is estimated that 90% of the entire management across the London and South East will complete the qualification by the end of the year.

"We consider coaching a fundamental skill for the whole of our management team, development managers and the leadership team too. Coaching is not just a shared skill; instead a means to a constant conversation, mutual understanding and team performance." Ryan McDonald, Director, London and South East, SJP.

How to sustain this new culture

A **coaching champions' network** was set up within SJP and these leaders now work together, regularly meeting to discuss issues, support each other and to continue to learn from one another. These coaching champions allow the culture to take on a self-sustaining life of its own once the

formal training has ended. Some of these champions have even decided to go further and gain a qualification in coaching ILM level 7.



Summary

The programme isn't just about learning to be a good coach and mentor and getting a qualification. It is much bigger and far reaching.

It has built connections and strengthened relationships and in this world where people in business aren't having those water cooler moments, chats in the canteen, conversations in the lift, the programme provides a way to connect and collaborate in a virtual world.

The programme has engaged people, inspired, increased performance and ultimately maximise productivity, which for SJP is the number one priority.

Along the way the participants have had fun, they have laughed and cried, they have coached and been coached, they have built relationships and broken-down barriers, created intimacy and a sense of belonging.

How many courses have you been on that you could say that about?

Don't just take our word see what some of the attendees had to say below.

“It has been massively fulfilling and is a skill for life.”

“The satisfaction and pride I feel at the end of these sessions when you can visibly see the difference you make was unexpected but very welcomed.”

“Allowed us to take in learning, apply it without any fear.”

“It really has made a massive difference to how I work and communicate with everyone in and out of work.”

“It was thought provoking and I feel I have grown not only as coach but personally too. Giving us the space to actually practically apply these lessons is what sets it apart from any other course I've been involved with.”

For more details and to see what coaching could do for your business get in touch

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