

# Client Case Studies and Testimonials



Action Impact Movement

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“ I love what I do. And I believe I get more done because I bring the fun. Read on to hear what my clients have to say and discover the results we've achieved together!



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\*names are changed.





## Bill National Leader, Professional Services

### SYNTHESIZE AND EXECUTE

**Bill's Situation:** Bill was a seasoned partner and very successful client service partner when he was asked to take on the National Leader role. He inherited a team of other high-performing leaders and an expectation to grow the practice year over year.

**Bill's Issue:** Bill was hands-down the guy you wanted in front of your clients during a tricky client issue or negotiation, but when it came to the administration of running a national practice he needed some support.

I was working in another part of the business at the time and crossed paths with Bill in a meeting I was running one day. The next morning I got a call from him that went like this, 'Campbell, I think I need you.' (nobody calls me Campbell). My response, 'You're right'.

**How I Helped Bill:** A week later I was in his office with my outline and ideas for how we could work together to more effectively run the team and the practice – the beginnings of my AIM Roadmap. We ended up working together for years, during which time we developed a new practice-wide strategy, debated countless ideas, filled out all the business planning documents – in triplicate – on time, led effective leadership decision-making meetings, solved many issues and, most importantly, had a lot of fun!

**The Result:** One of the ways I measured my success in working with Bill came after I'd returned from maternity leave – his leadership team were so glad I was back! Apparently while I was away things were not as organized, thought-through, or fun. I helped Bill focus on the things he was best at, while still accomplishing all the other things he had to do as part of his national role. I challenged his thinking, defused heated meetings, synthesized disparate thoughts into organized plans, coached others on how to best present ideas to him, and edited his communications to the point where I think I wrote more like him than he did! We were a great team.

*A million thank yous. You are a very big part of the success I and the leadership team have had. Few realize just how valuable your contributions are.*

*The latest on  
this month's issue!*



## Aresh Practice Leader, Professional Services

### ALIGN TO ONE VISION

**Brian's Situation:** Brian was promoted to the role of business unit leader for a state-wide practice with five offices and over 100 employees. Each office operated autonomously and there was very little alignment or sharing of people or knowledge among the offices. Brian's mandate was to have the offices operate as one team with shared resources, shared wins, and shared losses.

**Brian's Issue:** Brian was burning himself out by visiting all the offices, trying to prioritize where to start, and managing his own heavy client load. He was frustrated with those resistant to the change, didn't have time to put together an organized plan, and worried that he wasn't bringing his A players along with him on the journey.

Brian was explaining this to me during a meeting we were both at one evening and I knew I could help him. I outlined my AIM Roadmap approach and by the following week I was booking flights to meet with him and his team.

**How I Helped Brian:** Brian needed a fresh perspective, a sounding board, and a person with a plan that could help him prioritize where to start and how to move forward. I leveraged by my AIM Roadmap to:

- Gather background info on Brian's one-state vision, his views on each office, his frustrations and challenges, and the actions he taken to date
- Meet with key team members to hear their understanding of and reactions to the one-state vision and plan and gather feedback on Brian's leadership style
- Summarize my findings and prioritize next steps with Brian

**The Result:** In Brian's words, working with me helped him:

- Generate more and better ideas for his vision
- Gain the support and commitment of the team
- Develop an organized and supported plan
- Make the vision a reality
- Prioritize where he spent his energy and lower his stress level by refocusing on his A players and those committed to the new vision

*Jennifer has proven to be professional, thoughtful and insightful in her questions as she has encouraged me to explore perspectives not previously considered. This coaching relationship has helped me make significant positive changes not only in my professional career, but as well in my personal life. I have had several coaches over the years, but none have proven to have Jennifer's ability to connect at a personal level, and provide an environment where I have been comfortable sharing my challenges. Her ability and desire to move beyond personal coaching and into organizational change, to include insight on design and drive on execution and accountability has proven invaluable to me over the years.*

The latest on

THE WINTER  
COLOR PALETTE - 3



## Jack Global Leader, Financial Services

### LISTEN, BRAINSTORM, NAVIGATE

**Jack's Situation:** Jack joined a growing firm to bring structure and progress to an underperforming function.

**Jack's Issue:** Being new to the organization he needed a neutral sounding board and someone to brainstorm with who had experience in leading change in many different organizations.

**How I Helped Jack:** Jack and I had started working together years before when he was looking to change roles. We had a long-established relationship, so when he moved to a new organization with a big mandate, he called me in to help him.

Jack is a high performing, successful leader. He loves jumping into scenarios where we can build something new – a new team or a new process. He's a fixer with loads of ideas and I helped him summarize his thoughts and develop an action plan. I also provided a neutral view as someone with no conflict of interest and only his success as the goal.

**The Result:** Jack knows he has someone he can call when he needs to solve a problem or talk through a situation. I summarize our calls and provide templates and models that help him move his agenda forward. His stress level comes down, his course of action is clearer, and he has the tools to help him enroll others in his plans.

*You're the first person I want to call when I have a new problem to solve. You're the secret weapon that helps me excel.*

THIS WOMAN'S ISSUE:

THE WINTER  
COLOR PALETTE - 3



## *Sara, Ross, Josh and many others Successful Partner Candidates, Professional Services*

### **PREPARE FOR PROMOTION AND LEADERSHIP ROLES**

**The Situation:** Each client was preparing for the partner admission process in their firm.

**How I Helped:** I engaged with each individual to support them through the promotion to partner process. With a structured path, including self-assessment, 360° interviews, targeted development plan, and individual coaching, we worked on their development areas, prepared for panel interviews, and addressed day-to-day issues during our regular conversations.

**The Result:** They were each promoted to partner and felt prepared for their new leadership role. And we are still in touch and invested in each other's success.

*I've had executive coaches in the past and this was hands down a different experience with Jennifer. – Sara*

*You looked at what I was doing from the outside and brought a different, neutral perspective that was invaluable. And I was able and felt comfortable to speak freely. I took so much out of our conversations. – Josh*

*I very much appreciate you. While you definitely helped coach me through the promotion process that's ongoing, your feedback and conversations on many topics have truly helped me deal with what could have definitely been a mind-kerfuffle to deal with. I don't know how I could say thank you more, but on the topic of legacy, you have made your mark on me. – Ross*

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month's issue:

WINTER  
OR PALETTE - 3





## *Kathleen* *National Learning Manager, Professional Services*

### **DEVELOP AN IMPACTFUL LEARNING EXPERIENCE**

**Kathleen's Situation:** Kathleen and I were connected through a mutual contact. We set up a virtual call to get to know each other. We hit it off and by the end of the call we were sharing vacation stories and setting up our next call to brainstorm ideas for an upcoming national program with 600 participants.

**Kathleen's Issue:** Kathleen was in charge of the signature program for new leaders across the country. She wanted a cohesive program focused around improving the culture of providing continuous feedback. She was fairly new to her role and thus didn't have deep knowledge of the organization yet.

**How I Helped Kathleen:** I brought my knowledge of the firm and my subject matter expertise in developing new leaders to help solve her challenge of trying to improve the culture of feedback. We brainstormed ideas. I listened for her needs and quickly synthesized a flow for the conference aligned to her theme.

**The Result:** My quick response time and organized summary helped her focus on the right objectives for the conference and develop a cohesive program versus ending up with a disconnected series of speakers. I also developed and delivered a custom learning module that anchored the full program and enabled other presenters to align their content to the common theme. Kathleen succeeded in her goal to deliver an engaging and impactful program and the participants gave rave reviews.

*You're friendly,  
approachable, quick, and not  
salesy. Your ability to  
synthesize my ideas and  
provide applicable and  
engaging content made me  
and the program successful.  
Thank you!*



## Peter CEO, Health Care Manufacturing

### CHANGE, IMPROVE, SELL

**Peter's Situation:** Peter was the new CEO of a long-standing organization thoroughly set in its ways.

**Peter's Issue:** He needed to shake up the management ranks, gain efficiencies in the business, improve the quality standards, and win back some frustrated customers.

**How I Helped Peter:** Peter needed someone with experience in leading change to join his team. Our paths had crossed years before on a large-scale change initiative, but we had never worked together directly. Within a short time I was up-to-speed on the key aspects of the business, got a pulse on the organization and the management team, and had some ideas to share with Peter on how to go forward. One thing I've realized is that no matter the type of organization – professional services, retail giant, or manufacturing plant – the people issues are the same.

You need your people to execute your strategy and they need to feel heard and be bought in to your ideas to make them come to life. I helped Peter gather process improvement ideas from the plant floor employees, I spearheaded a succession planning process to identify critical roles and high potentials, and I led the change management and communication efforts during the sale of the company. Essentially, I brought structure and process to Peter's turnaround and transition ideas to make them a reality and we managed to have some fun during a very stressful time.

**The Result:** Improved key performance indicators and efficiency, lowered Peter's stress level, taught the management team a more collaborative way to solve problems, and successfully sold the company.

*Thank you. This [company sale] transaction took a lot of effort from many people for the good outcome, including you. Your steady hand, attention to detail and great judgement made a huge difference – I always felt supported and knew you had my back – the ultimate trust that is so precious. – Chair of the Board*