



Case Study 1:
From Grief To Dreams

The Challenge:

The first case study involves a Midwest businessman with an MBA in his early fifty's. The pain points included the passing of his parents after managing all aspects of their long-term care, the selling of family assets, completing new financial licensing exams, and all the emotions that accompany these transitions happening simultaneously: call it growth.

He needed my legacy advisory service for coaching around these hard areas. To have a trustworthy sounding board who cared to listen on more than a superficial level. He needed to re-evaluate his compass and how he viewed and valued his existing business relationships. He received support around finding his voice to stand up more for himself regarding his specific business endeavors.

The client agreed to a multi-year commitment of coaching with me because of the added pressure to perform at his work with investment sales. He needed to dig deep into his roots to move on his values compared to allowing grief or anxiety to drive his decisions. With the passing of his parents of whom he was very close to, he needed a secure space for self-evaluation of his life after managing all aspects of his parents convalescence and estate management.

The effect of not having the words at times or the clarity to describe his experience of holding both parent's hands through their final few years, left him with a deep sadness and feeling of loneliness.

The Solution:

I responded to the client's pain by asking quality yet provocative questions to reframe scenarios. We used visual metaphors to create what the "what could be?" situations by patiently holding a space for internal development. The happier he was outside of his work, the happier he would be when showing up at work. This gave him confidence to present and teach his clients about a variety of financial products related to their retirement investments.

What is unique about my coaching style is that it combines the well known Co-Active model with direct consulting to create not only a better life or work performance for short term goal achievement but also, a bird's eye view of one's life decisions as it impacts their legacy. The more this client loves himself in a nurturing, healthy way, the more he is able to help the lives of others by his positive influence. There is a honing of skill sets required not just in the work arena but in the emotional area as well. He specifically needed to slow down, enjoy more and feel gratitude for various aspects of and opportunities in his life.

He was loyal and committed to the coaching service because the evaluation and feedback was done in a gentle way that respected his feelings and thoughts compared to a harsher style of lecturing or dictatorship which would have caused rebellion and backlash. The client knew the coach understood his personality in when and where to push for transformation in each call.

He found working with me a calming experience in that I made sure that I was not too rigid with him related to his weekly performance excel spreadsheet where he tracked his specific activities and areas of progress. My style of coaching was non-judgmental and right for him to plan his next steps in his life's legacy because it was honest and loyal to his vision.

The Outcome:

The difference my coaching service has made to this client's life is a greater awareness, clarity and acceptance that his journey is unique to him alone. What one presumes as normal may not always match one's new self-knowledge that the journey brings in both wisdom and discomfort at times. This client has found renewed strength now with his work, more confidence to press forward with plans of connecting socially as well as allowing himself to travel more to new destinations. He is also more conscious of his hidden strengths that allow him to overcome daily and weekly challenges in knowing that his strength is not lost. Since his parents passing, he is now able to shop with his sister and appreciate her surprise birthday parties.

With reclaimed resilience in his new roles at this stage of his life, the results of how he sees himself translates into his ability to serve others. For those who have to walk a similar path of assisting their parents in all aspects of their final years, he knows he can relate and build rapport with others in bringing value to a greater mission. He can take back the narrative of sadness and give purpose to his past in the sacrifices he made to love his parents in the end. The difference is recorded in his weekly excel spreadsheets as his preferred method of tracking KPI. He knows he can contribute to others by his personal experiences while allowing himself to inch closer to his dreams still to be completed on his bucket list.