

Stephen – A Career Coaching Case Study of a Struggling Entrepreneur

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Name: Stephen

Age: mid 40's

Education: Bachelor of Business Administration degree with a major in marketing

Current Occupation: Owner and principal consultant of a solo public relations firm

Marital status: Single, never married

Residence: Has lived in Atlanta, GA for 17 years, originally from TN

Coaching Engagement: April 2007 to December 2007

Presenting Issues and Concerns

Stephen is a public relations (PR) consultant and the owner of a solo PR firm. Since its inception and for the past few years, he has run his business out of his home in Atlanta. He is known for his media relations and frequent participation in special events, as well as being recognized for his ability to match clients with charitable causes.

After three-and-a-half years of business, with two part-time employees, he sought the help of a business consultant to grow his firm over the following year. The consultant and Stephen agreed that in order to accomplish that goal, Stephen needed to improve his time management and organizational skills, establish and reinforce boundaries, and improve his work~life balance. Therefore, he was referred to me for career/executive coaching.

Stephen was familiar with coaching, having worked with an executive coach off and on from 1997-2003, as well as with a professional counselor at various points in his life. He openly describes himself as having an obsessive-compulsive personality, which causes him at times to

work to the point of burnout. Stephen shared a story with me, in which he described how he folds his laundry to exact specifications and regularly rotates the clothes in his dresser and closet to avoid being seen in the same outfit too frequently by friends and clients. Obsessive-compulsive disorder is defined as “a subclass of anxiety disorders with two essential characteristics: recurrent and persistent thoughts, ideas and feelings; and repetitive, ritualized behaviours” (Reber & Reber, 2001, p. 479).

Stephen acknowledges that his four letter personality type, according to past administrations of the *Myers Briggs Type Indicator* (MBTI) is ENTJ: Extroversion-Intuition-Thinking-Judging (see ENTJ *Type and Coaching Summary* as attachment I in Appendix). He further concedes that he understands and is in agreement with the broad description and patterns associated with ENTJ. “In summary, type preferences are not traits, or even clusters of traits. They are preferred ways of being in the world, different mind-sets, different ways of experiencing life’s daily events and processing the experiences” (Lawrence, 1993, pp. 36-37).

Stephen struggles to strike a balance among the competing priorities of career/entrepreneurial, social, and philanthropic commitments, and is often late for appointments. He is challenged by a schedule that includes public relations appointments, social engagements and philanthropic events, many of which are held in the evening. He often works until 1-3 a.m., sleeps late and, upon arising, becomes distracted by work and creative ideas, which again starts him on the cycle of running behind in his daily schedule.

The variety and independence offered in careers in consulting appeals to ENTJs. The field has grown tremendously in recent years, giving ENTJs the chance to satisfy their entrepreneurial spirit, work with a variety of people in a variety of business settings, and

be compensated in proportion to the work they put in. ENTJs often excel in business or management consulting and can be excellent and stimulating trainers. They usually create a structured and challenging environment with creative designs and active sessions. They almost always prefer to take on new projects, and enjoy teaching other ambitious people ways to increase their competence (Tieger & Barron, 2007, p. 175).

Stephen certainly enjoys spending time with friends, going to the gym and the park, yoga classes, and self-enrichment activities. However, at his core, he is a driven entrepreneur who over-commits, trying in vain to accomplish more than one person can in a given work week.

Career Coaching Barriers/Goals

At our first session, Stephen expressed that he would like to be more productive with a system for following up on calls and letters, being on time for scheduled appointments, accomplishing tasks, and having realistic goals. He also expressed a desire to “have a feeling of division between work and leisure,” to have clear boundaries between work time and down time. He wanted to increase his income while working with fewer clients. He also expressed the desire for less stress in his life. He strives to be in excellent physical, mental and spiritual condition, and to feel more grounded, with a greater connection to his own nature and more compassion for himself and others.

Stephen’s first main barrier to accomplishing his goals was lack of adequate support staff, and much of our work focused on helping him to identify what he needed in a support staff and to develop strategies for satisfying these needs.

The second barrier was Stephen’s inability to recognize his own limits. Once he was able

to face this core issue and its many detrimental impacts, the stepping stones to success were well within sight for Stephen.

Assessments/Information Gathering

After our initial session, using MBTI preferences as a foundation, I asked Stephen to put together a profile for the best-fit candidate for a personal assistant and administrative assistant to support and compliment his preferences as an ENTJ.

He also took the *Time Management Practices Inventory* (see attachment II in Appendix), which pointed to the need to focus attention on daily planning activities and meeting all deadlines, large and small.

I provided him with strategies and examples to assist him in working through the following exercises: 1) putting together a list of *pros and cons* about moving his office out of his home, and considering the purchase of a second computer for his assistant or a laptop for himself; 2) putting together a draft of a realistic weekly schedule, with ample time for work and personal activities, which he could use as a template and to train his assistant on scheduling protocol and; 3) identifying *who* and *what* derails him from his schedule and priorities, as well as *how* this consistently occurs.

Coaching Sessions

Our initial sessions focused on the assessment activities listed above and on raising Stephen's consciousness about the impact of saying "yes" to cramming more into his schedule than he can realistically accomplish. I asked him to consider whether he could begin to say "No." "That yes to a simple action is a yes to some deeper commitment, a promise, even a new or

deeper way of being in their lives. Saying no to a simple action is much more than taking that one thing off the list. It often means saying no to old beliefs or old expectations, no to self betrayal, no to habitual ways of reacting to the demands of others” (Whitworth, Kimsey-House, Kimsey-House & Sandahl, 2007, p. 149). During the second session, I also offered Stephen a personal strategy to aid him in wrapping up his meetings on time.

Our third and fourth sessions focused on helping Stephen try out new approaches to keep him organized, on task, on time, and to maximize the help from his support system so that he would feel in control of his personal time and work schedule. Toward that end, we identified what tasks Stephen was comfortable having his part-time assistant, Luke, complete and then set up a training schedule for Luke. Effectively managing the daily volume of incoming email has been a problem, so we devised a system to delegate this task; and Stephen was asked to try to implement the system on a trial basis with Luke. I also urged him to be proactive with his web site and email providers, to secure the services and support he truly needs.

We worked on the template for his schedule, which initially would be very structured with blocks of time devoted to personal time, work time and blended (networking) time encompassing public relations and philanthropy. A likely barrier for the ENTJ is in dedicating too much time to fruitless networking activities (Hammer, 1993, p. 29). I encouraged him to print out his daily schedule and carry it with him at all times.

Our next two sessions continued work on the training schedule; daily schedule; problems with his email service, including asking other PR professionals about email services they use and like; whether to move his office to a location outside his home and the purchase of a second computer. I also urged Stephen to delve into the *how* and *why* of his chronic lateness, which as a “J” (judging type per MBTI) he recognized as functioning against his true preference. “People

who have a preference for judging...prefer a planned or orderly way of life, like to have things settled and organized, feel more comfortable when decisions are made, and like to bring life under control to the degree that it is possible” (Martin, 1997, p. 6). Stephen reported success with color-coding his weekly schedule with the categories, red=important, blue=business, green=blended time, and white=tentative (see print sample of color coded schedule as attachment III in Appendix). He also practiced doing less by skipping a few routine activities during a week in which he also had plans to attend a workshop.

Our next two sessions continued work on boundaries and business practices: setting up a separate credit card account for business use; having his other part-time employee, Jessica, train Luke to process billing so that support staff is cross trained; and establishing a billing rate for support staff, to be added to monthly invoices. We also discussed issues regarding his website, getting his previous newsletter up and running again, the use of interns from local universities, and the installation of software programs to potentially aid with the website and newsletter.

Two months into our work, Stephen reported several positive developments, saying, “I know that I have made excellent progress with you—you are like my own board of directors!” As a chief executive officer is accountable to a board of directors, I felt Stephen would respond positively, if my suggestions also imposed a level of accountability upon him. “One of the defining qualities of coaching is that it creates accountability: a measuring tool for action and a means of reporting on learning” (Whitworth, Kimsey-House, Kimsey-House & Sandahl, 2007, p. 91). Stephen recognized that relying on a support system, to complete routine tasks, increased his personal efficiency as well as his company’s overall productivity. He also relished the freedom that his new laptop computer gave him, offering flexibility to work where and when he chose.

During the coaching, Stephen received a diagnosis of acute tendonitis in his shoulder,

which was exacerbated by stress. His physician began to treat this condition with medication and physical therapy. Stephen saw this injury as a setback; not only due to the physical restrictions it imposed, but also due to the negative impact it seemed to have on his ambition and sense of well being. As an adjunct to medical treatment, he chose to also engage in stress reduction activities, in which he used visualization, progressive relaxation and positive affirmations.

In our third month of coaching, during which Stephen was nominated for a community service award, I again stressed the importance of time off from the many commitments that require a great deal of his time, energy and effort, and leave him drained. He moved forward on my suggestion that he also work with a professional counselor to further examine his compulsive behavior, signs of mild depression and resistance to realistic boundaries between his personal life and career. “I listen for when my clients need a therapist. If they are repeating patterns without sustainable success, then I refer them to therapy...When a client can’t let go of an old story – and that story is in some way running them – this is a client for therapy” (Dewberry-Jones, 2007, p. 45). We continued work on the business issues of his email service, support for his e-newsletter and website, and ongoing training activities with Luke to encourage him to be more proactive. Stephen also made a huge leap by outsourcing work, letting go of the production and distribution of his e-newsletter by turning this over to a contract virtual assistant.

During our fourth month, Stephen made more progress in delegating tasks, recognizing his limits, as well as in recognizing what he really needed in support staff and taking effective action around that. He limited his own role in his e-newsletter to providing only raw data; as well as delegating the coordination of the e-newsletter and management of daily emails to Mallory, a new assistant with proven PR experience. Luke had made the decision to accept an internship assignment and moved on to this new role. Stephen’s business was starting to take off, and he

recognized that by having to hold the reins of the newsletter, he had been standing in his own way in terms of getting his message out to his network.

We continued to work on effective training scenarios and strategies for his new, better-fit assistant, as well as developing a *statement of understanding* form for new clients, as a proactive measure to eliminate confusion/misunderstandings regarding fees and deliverables. I also reminded him that when he continues to feel overwhelmed this may be due to the lack of a solid support system being fully in place, and a lack of honesty with himself about what one person can accomplish in 24 hours. I encouraged him to realize that once the support system was truly in place, he would likely start to be more productive and feel more in control, through effective delegation and coordination of tasks.

During our sixth month, Stephen began to face the following realization: “Why am I such a masochistic over-achiever?” he asked. “I feel like I am working so hard, making decent money, but just getting by financially.”

That insight yielded riches as we continued to work on effective training to ensure success with the latest addition to his team, including defining her MBTI type to determine compliments and any potential conflicts with Stephen’s personality preferences. I also aided him in identifying additional routine tasks to be delegated to Mallory.

In one of our final sessions, we discussed the role of closure with a client who had abruptly terminated Stephen’s services. I encouraged him to consider it a positive outcome; because the client required such hand-holding, empathy and guarantees; Stephen was in a position where he could not meet unrealistic needs. I urged him to ask for a meeting during which he could receive feedback from this client in order to learn and grow, as well as to aid him in moving forward to define his target market to secure better-fit and best-fit clients.

Remember that what you are doing here is targeting a particular group, not excluding others. You are not limiting yourself by choosing a target market; you are organizing yourself to launch an effective marketing campaign aimed at the clients you want most. If someone outside that market shows up in the pipeline, by all means do business with them. But focus your outgoing efforts on filling the pipeline with those clients you are most interested in getting (Hayden, 1999, pp. 133-134).

During our last exchange, Stephen reported an epiphany that he intends “to work with young, successful entrepreneurs.” He shared the epiphany with a networking contact at a charity benefit, which directly led to the signing of a new client and sharing new office space with that client.

Outcomes and Results

Stephen made a great deal of progress during our work. When we first met, he presented as an overcommitted, chronically tardy entrepreneur with an inadequate support staff and an inability to create boundaries between his personal life and career. As a result of our work during the coaching process, he became a more successful business owner engaged in an action plan to focus on the necessary behavior to effectively manage his commitments and enjoy greater work~life balance. During the course of our sessions, he identified several key issues, such as: what he needed from his support staff, learning to delegate routine aspects of his business, moving his office out of his home, facing important truths about the impact of his overextended weekly schedule, developing a more realistic weekly schedule encompassing all types of

commitments, making necessary changes to his support staff, and then implementing adequate training measures to promote his success and the success of his team.

As his epiphany reflects, he also gained greater insight into the type of people he would like to work with as PR clients. The fact that this realization directly led to engaging a new client and new office space, further energized Stephen and continues to encourage him in his work. As he reports, “My focus this year is holism, balance, prosperity and joy,” and he wouldn’t be high-achieving Stephen if he didn’t add, “—among a few others!”

Coach’s Reflections

After my initial sessions with Stephen, I had the strong impression that this was a man who demonstrates a powerful work ethic and strives to maintain a sense of accomplishment. Although Stephen holds himself to high standards, he is in fact engaging in self destructive behavior. He consistently over commits himself and his competing priorities and interests leave him feeling frustrated and fragmented.

Stephen demonstrates that he is both willing and able to embrace change. During the course of our coaching sessions he acknowledged that there was merit to many of my suggested exercises and he experimented with new approaches to long standing challenges. In several instances, such as training a support staff, delegating routine tasks to assistants, purchasing a notebook computer and the scheduling of daily appointments, Stephen realized some benefit as he embraced change. However, toward the end of our coaching engagement, as Stephen maneuvered through his work day, long standing habits began to undermine the fresh approach Stephen had adopted.

When I introduced Stephen to the *saying Yes/saying No* technique, my goal was to

provide him with a very powerful tool to manage his daily and weekly schedule in a much more rational manner. He remains quite reluctant to accept the concept that there are realistic limits to daily productivity and networking activities. Although Stephen has realized some level of success with his PR firm, I question if he will be able to sustain this success and avoid burnout, if he does not recognize more reasonable boundaries and time requirements associated with his competing priorities. Stephen needs to further explore the basis for the personal habits which lead to unwitting self sabotage. It is my position that he should continue to work with a professional counselor to define, accept and overcome personal barriers to long term professional satisfaction and work~life balance. Only then will he truly be in a position to articulate his definition of success.

Recommendations for Ongoing Career Development

I asked Stephen, on several occasions, if he was interacting with colleagues to discuss elements of the PR industry, exchange ideas and share resources. On each occasion, he stated that he was in fact networking with colleagues for this purpose and he found these contacts to be quite helpful. It is important for Stephen to interact with individuals he finds to be intellectually stimulating. I encouraged him to continue to engage with industry peers to gain additional insights into his work and as a source of professional inspiration and motivation. Perhaps one or two of Stephen's colleagues will ultimately fill the crucial role of mentor.

Stephen might also consider creating an alliance with a successful national or international PR firm looking to establish a presence in the southeastern United States or Atlanta market. Demonstrating expertise, while serving as an independent contractor in this capacity, would afford him the opportunity to grow his business and potentially elevate his status in the

field of PR. I have no doubt that, if given this opportunity, Stephen will focus his talents and dynamism on delivering the highest quality of PR service and support.

I believe Stephen would benefit from participation in industry workshops and graduate coursework, to not only challenge himself intellectually, but also to grow professionally. Initially, he might concentrate on topics offering enhanced business management skills. He should then focus on more creative subjects to further cultivate his expertise in communication and visual design. This may in fact yield a tangible return, allowing him to expand the scope of services offered by his PR firm.

If Stephen can redirect some of the energy he derives from personal enrichment activities, such as yoga workshops, this can be channeled into a plausible career development plan.

List of Resources and Tools Employed Within the Scope of Coaching Engagement

- I. ENTJ - *Type and Coaching* Summary
- II. *Time Management Practices Inventory* - compiled for Stephen.
- III. Print sample of color coded schedule - prepared by Stephen.

References

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