



**Certified
Master
Coach**

**Certified
Forum
Facilitator**

Areas of Specialty

Servant Leadership
Emotional Intelligence
Senior Leaders and High Potentials
Executive Presence
Behavior change
YPO-WPO Certified Forum Facilitator

Industries

Healthcare
Professional/Technical Services
Transportation
Nonprofit
General Business

Professional Experience

President / CEO

LEAD Executive Consulting, LLC
*Executive Coaching, Facilitation &
Organizational Development*

Director of Psychiatry Services Presbyterian Hospital of Dallas

*Acute Care Hospital, Psychiatry
services, eating disorders, sleep lab*

Consultant, BD Officer

Executive Solution Partners, LLP
Human Capital Services

Clinic Director/Dir. of BD/Owner Medical Testing and Examination Centers, Inc.

Multi-Specialty Medical Clinics

Executive Director / CEO

Metrocrest Medical Services, Inc.
EMS Training and Medical Direction

Education

Master of Kinesiology
University of Texas at Austin

Bachelor of Science, Physical Education
University of Texas at Austin

Certified Master Coach
Behavioral Coaching Institute

Case Studies and Client Successes

Individual Coaching Results Case Study #1:

Situation: Managing Partner in international accounting firm engaged LEAD Executive Consulting to work with the Partner identified to succeed Managing Partner. Critical components of engagement were to increase engagement and trust other partners and direct reports, increase relationships/trust with clients, and decrease stress/anxiety when encountering stressful situations.

Action: After discussions and guidance with the coach, partner developed a customized development plan to address the three items above with the goals of increasing 360 assessment results indicating engagement and trust with partners and direct reports, increasing number of deep relationships with clients, and decrease stress/anxiety levels. Coach and Managing Partner agreed and signed off on plan. Partner met with coach every week and worked on action plans and other assignments related to goals.

Results: At six months, partner achieved goals in all three areas, citing keys to success were related to listening and communication skills where the emphasis was on listening to others from their perspective, considering the perspective of the audience when communicating verbally or in writing, and treating people as people versus objects (all related to servant leadership principles)

Individual Coaching Results Case Study #2:

Situation: Managing partners for professional services firm engaged LEAD Executive Consulting for a coaching assignment with the firm's administrator. Initial assessments indicated areas for development included Leadership, Strategic View, and Drive for Results. Concern existed as administrator's awareness of deficits did not exist.

Action: After discussions with the coach, administrator developed a customized development plan to address the three items above with the goal of increasing the scores (for managing partners and staff) by 20% within six months. Coach and sponsor agreed and signed off on plan.

Results: At six months, administrator exceeded goals with both staff and managing partners. With staff, administrator exceeded 50% increase for 8 of 11 dimensions measured.

Team Coaching/Facilitation Results Case Study #1:

Situation: Managing partners for professional services firm engaged LEAD Executive Consulting to evaluate the status of the firm. Several months prior to engagement, an event occurred between the partners which was a source of distrust. Additionally, the team experienced symptoms of lack of commitment, avoidance of accountability, and fear of conflict. The team was advised of the results of the assessment and given recommendations for addressing the above issues (team building), as well as the creation of a firm Mission, Vision, and Core Values.

Action: The team met twice (4.5 and 5.5 hours) to participate in a customized conflict resolution intervention, and additional two times for Mission, Vision, Core Values creation.

Results: After first meeting, managing partners were **open** to making commitment to engage with each other. Additionally, they committed to open communication with each other, as well as accountability. After the second meeting, the partners **made** the commitment, shared their upsets, resolved their differences, and were able to work together as a team to develop the Mission, Vision, and Core Values (in subsequent meetings). During the second meeting, two partners acknowledged that they planned to leave the partnership, but the outcomes from the meetings changed their minds. All partners indicated their belief that the firm would have dissolved if it were not for the intervention.

Contact Information

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