



CLIENT CASE STUDY

Multi-million dollar finance executive, goes from overwhelmed to energised, massively increasing productivity and with a clear client acquisition plan.

OBJECTIVES

Gerry is a successful finance executive, his small company manages millions of dollars' worth of customer assets.

After some personal changes in his life Gerry was feeling overwhelmed and unproductive. He was referred to me by a previous business client.

Challenge:

"Busy executive in need of organization, priority setting, time management, deadlines, software tools to run my executive and personal life. Everything from prioritizing / keeping track of goals, daily habits, daily deadlines, projects to personal finance. With so many things to juggle and so many tools, it feels overwhelming...." Gerry - initial email

SOLUTIONS

As a first step, Ilse and Gerry created a plan to increase productivity, which included centralising all of Gerry's activities and communications in Microsoft applications and ensuring that he had access online and on the go.

Feeling more comfortable with the new productivity tools and building healthy daily habits, Gerry worked on better delegating tasks to his junior staff, he also hired a personal assistant to help with activities where Gerry's time added little value.

One of Gerry's big goals was building relationships with people who could help him sell his financial products to the end consumer. With Ilse's help Gerry created a detailed plan to acquire 10 ideal referrers in 8 months.

Finally, Gerry worked on the mindset aspects that were holding him back and set a bigger vision than he had at the start of the coaching relationship.

AT A GLANCE

Challenges

- Increase productivity
- Decrease overwhelm
- Build daily healthy habits
- Plan to acquire new referral sources and increase revenue.

Benefits

- Increased energy and peace of mind
- Clear effective plan to acquire new business
- Ability to get over mindset blocks and delegate activities.



"Waking up early, ENERGIZED and ready to live my amazing life"

Gerry

Financial Services Executive