

CLIENT TRANSFORMATION

FROM OVERTHINKING TO OWNERSHIP

Client: Gerry W., VP + Founder

Engagement: 6-month 1:1 Executive Coaching

Focus: Strategic identity, founder mindset, market positioning, leadership influence

Client Profile: 20+ years in financial services | Building thought leadership and boutique consultancy alongside FT leadership role

"I'M NOT SCRAMBLING FOR VALIDATION ANYMORE. I KNOW WHO I AM, AND I KNOW THE VALUE I BRING."

THE CHALLENGE

When Gerry reached out for coaching support, he was straddling two worlds: a demanding full-time finance executive role and a growing consulting business in credit and collections.

Despite deep expertise, he struggled with:

- **Overthinking and perfectionism**, especially in outreach and visibility
- **Unclear messaging** around his consulting value and offer
- **Tension between speed and strategy**, often defaulting to urgency over intentionality
- **An outdated leadership identity** focused on proving worth vs. owning authority

Gerry knew he had something valuable to offer, but his confidence was tangled in **pressure, self-doubt, and unclear positioning**.

COACHING APPROACH

Over 12 sessions, we worked to shift both how Gerry thought about himself and how he showed up in the market. Our coaching focused on:

- Refining his consulting offer, **positioning Gerry as a strategic asset**, not just a vendor
- Crafting stories and case studies that **showcased his results with clarity and credibility**
- Experimenting with cold outreach and **building confidence** through small, consistent actions
- **Untangling the "scarcity loop"** of needing every move to lead to a sale
- **Supporting visibility** on LinkedIn, in conversations, and through writing
- **Reframing what success looks like** when juggling dual roles

Sessions often blended strategic messaging with identity-level coaching, helping Gerry **reconnect with his values, voice, and vision**.

THE TRANSFORMATION

By the end of our 6-month executive coaching engagement, Gerry had:



Greater clarity and confidence in how to talk about what he does



A flexible outreach process that feels aligned with his tone and expertise



Multiple LinkedIn content drafts, email frameworks, and white paper ideas



Improved emotional regulation and reduced burnout triggers at work



A stronger founder identity – grounded, strategic, and no longer reactive

Most importantly, he's now thinking and operating like a leader with a long game.

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CONSULTING



"You helped me clarify not just what I do, but why it matters, and who it's for. I'm walking away with confidence, clarity, and a sense of control I didn't have before. You helped me stop spinning and start leading again."