

# Case Study

**David Longstaff**  
Executive Coach

15 years' experience in productivity  
Presenter and trainer  
Keynote speaker at conferences



**Client organisation:** University of Stirling

## Background

The client already had a senior position in the organisation as a professor and deputy head of school. However, with an increasing workload on the horizon and the prospect of taking on an even more senior role, it was important to renew their approach to prepare for this changing world.

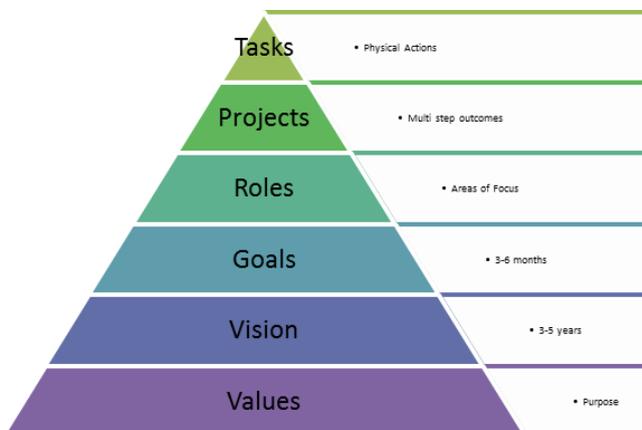
## Remit

David Longstaff was asked to help the client to review their systems and provide an effective set of tools to manage their increasing workload.

## Approach

David met with the client on-site to assess their existing approach and tools, along with their preferred technologies. Although many have a largely Microsoft environment, in this case the client was mostly Apple-based with some paper support material. Through a series of at-desk coaching sessions, David helped them to customise their systems and improve their performance.

The client already had most of the tools required to provide a fully working structure. By using additional features already available in the hardware and software, the client was able to get on top of their increasing commitments.



However, as it often the case, it was important to provide a number of other frameworks which are designed to help clarify our work, ensuring that we do things right, but also do the right things. This allows us to identify clear goals and effectively communicate our long range vision and values.

Although many try to implement a bottom up approach (Values > Tasks), a top down approach (Tasks > Values) is often more

effective since many people find it difficult to think at these deeper levels, while they still have 300 unread emails in their inbox.

# Case Study (Continued)

## Results

The client has adapted their Apple toolset and now has a fully working system to manage their calendar, projects, tasks and meeting notes. They have been able to get control of their email inbox and regularly get it back to empty.

The client has now been able to find the time and space to clarify deeper levels of their work, providing not only good control of their systems but also perspective to their work and personal life.



***“It’s important to not only do things right, but also do the right things!”***

The coaching continued for 6 months, and ongoing support was provided through a mix of face-to-face and virtual meetings using Skype.

The system and broader approach have met the test of time and even during very busy periods is still working well.

## Post-coaching comments from client

“I was reasonably well-organised (I thought), but my task list was getting on top of me. And don’t even ask how many emails in my inbox!

David transformed my approach to organisation: he helped me re-assess my priorities, to remember what my job really is, and streamline my operation. Most importantly, he showed me tools that I could use to organise myself. Some of these were software, but some of them were techniques for staying on top of things.”

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