



JDA

Driving Performance, Sustaining Results

JDA's Coaching Philosophy and Approach

What is Coaching at JDA?

Coaching is a whole-person partnership that enables people to go farther, faster towards their goals than they would have on their own. It supports good performers to become great ones in less time.

Over the last couple of years, we have witnessed a major shift in executive coaching, particularly how coaching is offered in organizations. Traditionally coaching has been targeted to the senior-most levels in organizations where it has been a critical tool in providing executives with an objective, confidential outside ear and individual support to create and sustain changes in behavior, productivity and teamwork. The model has been one where coaches partner with leaders, managers and high potentials in a thought provoking and creative process with the aim of maximizing the client's personal and professional potential.

An emerging trend among our clients who are focused on the intersection of people, performance and change is to align coaching to strategic business plans, transforming this valuable tool into a key practice that enhances the overall performance of the organization as well as the individuals working within it. We at JDA recognize this shift and as a result are poised to offer a unique strategic coaching service to meet this growing need.

What Coaching Is...	What Coaching is Not...
<ul style="list-style-type: none">◆ A powerful way of learning and developing◆ A continuous, solution-oriented, time limited sequence of meetings between a senior leader/high potential and a professional coach◆ An intervention that focuses on the individual executive, his/her organizational role and the context within which they operate◆ Confidential work with senior leaders/high potentials at enhancing their current and future effectiveness	<ul style="list-style-type: none">◆ Therapy◆ Consulting◆ Mentoring◆ Training

Coaching with JDA is Different

Working with Sponsor Organizations: Strategic Coaching Practice Management

JDA's coaching practice ensures that coaches are leveraged as a strategic asset to the organization as well as an individual asset to the leaders we coach. We provide a coaching practice that is effective, highly customized as well as an exclusive development intervention for our clients. Through partnerships with various stakeholders, we aim to create a practice that is sought after in its value as well as viewed as enhancing other business and leadership initiatives.

For each coaching project, we provide you with a Practice Manager who is committed to the success of each coaching engagement and to coaching overall within our client's organization. The Practice Manager oversees and facilitates all aspects of coaching strategy and process in partnership with HR, other Stakeholders and Coaches. They are the first point of contact between the client and the coach(es).

We ensure our coaches are well informed of the system in which they are coaching; knowing the strategic direction and business goals of the organizations within which they operate. This allows our clients to leverage coaching as a tool to enhance the overall performance of the business. In addition to this, while protecting the confidentiality of the client, we assemble our coaches to discuss broader organizational themes that are emerging in their coaching engagement and share these themes with the organization, with the aim of providing the organization with feedback on key areas that may need to be addressed.

By collecting an exemplary cadre of coaches, establishing norms, structure and protocols for the coaching process that are aligned with the strategic direction of the business, we deliver a dynamic process unique in its ability to shape the future of leaders and your business.

In addition, by offering you a structured and strategic approach to coaching, we are able not only to bring greater leverage to your coaching dollar but also impact the performance of your business.

Strategic Coaching Practice Management

How We'll Work With You

Alignment

- Work with Human Resources, Talent Management and Senior Leadership to understand the unique strengths of your organization's business, strategic plans and culture
- Identify opportunities to leverage coaching as an enabler of business and talent management success

Create Process

- Partner with Human Resources & Talent Management to craft policies and processes around coaching
- Recommend practices that can help you effectively identify and prioritize opportunities for coaching
- Work with you to prioritize the highest and best use of your coaching dollars

Engagement Management

Manage to the strategy, policies and practices:

- Source coaching opportunities
- Evaluate opportunities with Human Resources & Talent Management
- Match coachees/coaches and launch engagements

Managing Coaches

Work with all of the coaches who work in your system:

- On-board and integrate new coaches
- Ensure mid and end-point engagement reviews occur
- Capture and implement feedback from stakeholders, coaches and coachees for continuous practice improvement

Systemic Feedback

- Work with Human Resources and Talent Management to capture, from across all coaching engagements, value-added insight into your system around development themes, cultural/organizational change, barriers to change and business opportunities to be explored

Continuous Improvement

- Attract best-in-class coaches to the practice
- Remain up-to-date on changes in your business and its strategies
- Realign coaching policies and processes, as needed

Coaching with JDA is Different Working with Individual Clients

We appreciate the opportunity to work with critical and high potential talent and look forward to supporting their professional development. Coaching has been demonstrated to have very powerful results when three factors are present:

- The client has a strong desire to develop their potential
- There is a gap between where they are now and where they want to be, and
- They are ready and willing to take action to achieve the results desired

These factors are necessary for us to partner with clients to improve their performance and effectiveness, get a business jump started, make a successful business or career transition, or create a more satisfying and successful work and personal life.

Through the JDA coaching process, clients will:

- **Take focused actions based on strengths.** None of us is able to produce the extraordinary when we focus on trying to improve weaknesses. Greatness derives from our strengths. Strengths develop naturally and they are enduring. Clients are more able to focus, have more excitement and be more committed to developing skills when goals are set and actions are taken that leverage strengths in a powerful way.
- **Understand preferred communication styles.** Clients have a distinct advantage in professional or business environments and enjoy more satisfying relationships when they are able to fully discern the preferred styles with which they (and others) communicate. When there is self-awareness and awareness of others, rapport is quickly established and communication of all types are more effective. This can be enormously important when you consider the fast pace with which business and interpersonal interactions take place in today's environment.
- **Reach for more than they would have asked of themselves.** Clients can be surprised at their desire and ability to reach higher and not be overwhelmed in the process when they have a trusted partner working for their success. Clients find it easier to set and attain ambitious stretch goals with the support and accountability of the coaching relationship.
- **Use the power of language to enhance effectiveness.** There is an increased amount of power accessible to clients when they have full understanding and command of language. We help clients identify those areas where language diminishes impact. We help clients create new uses of language that serve them and the business.
- **Expand their self-awareness.** Clients become practices at viewing themselves from three perspectives: language, emotion and body/somatic.
- **Know and experience authenticity as people and leaders.** Clients will become more familiar with who they are authentically and better able to be coherent with respect to their language, emotions and body. We work with clients to develop and implement practices that support this coherence.

Our Coaching Offerings

JDA Coaching Offerings

Executive Coaching

- Coaching for the top of the house
- Focuses on a number of issues such as significant transitions, derailment prevention & senior leadership challenges
- Often includes a form of assessment
- Duration varies; likely to be 6 months

Group/Team Coaching

- Coaching intact or working teams to ensure greater team alignment
- Coach works with intact team, leader of the team, as well as and individual team members
- Usually includes a form of assessment
- Duration and design varies depending on results of the needs analysis

360° Debrief Coaching

- Debrief 360° feedback report and provide insight into next steps
- Often the platform for further coaching discussions
- Target audience can be high potentials, new managers or senior leader
- Duration approximately 2 hours

High Potential Coaching

- Usually driven by internal talent review process for high potential individuals within the organization
- Focuses on the individual enhancing his/her potential
- Usually includes an assessment such as 360° feedback review or Hogan Leadership
- Duration usually 6 months

Transition/ On-boarding Coaching

- Targets new executives or executives going through a significant transition
- Focuses on equipping the individual with skills to enhance their change
- Assessments may be part of this engagement
- Duration 3 - 6 months

Targeted Coaching

- Individual coaching interventions with narrowly focused learning content and limited timeframes, i.e., presentation skills coaching
- Duration varies; 3-8 sessions depending on the needs assessment

The Coaching Engagement

JDA Coaching Process

A typical coaching engagement includes the following process:

Qualifying & Contracting

- JDA conducts a needs assessment with various stakeholders (Coachee, HR representative, Manager, etc.) to determine the nature of the coaching need. During this time JDA communicates their coaching process.
- JDA's Practice Manager sources coaches who would meet the coaching need.
- Chemistry meeting scheduled with Coachee and Coach.
- If the above is a match, formal contracting takes place with the organization and JDA determining nature of the coaching engagement.
- Before the coaching process begins, we suggest a meeting with the Coach, Coachee and his/her Manager. This meeting serves to ensure everyone is on the same page regarding the coaching objectives.

Phase One: Data Collection

- The Coach typically conducts a data collection process such as interviews, a 360°, Hogan Lead or other assessment(s).
- The Coach meets with the Coachee's manager to gather information, as well as the coaching objectives the Coachee's manager may have.
- The Coach provides the Coachee with feedback gathered from the assessment(s).
- The Coach and Coachee work together to formulate an individual development plan which becomes the roadmap for the coaching engagement.
- The Coach and Coachee will meet with Coachee's manager to review the development plan.

**Feedback data is solely for the coachee.*

Phase Two: Coaching Conversations

- The Coach and Coachee typically meet every 2-3 weeks. Some meetings will be face-to-face (generally every 2 months), others will be phone calls.
- The Coach meets with the Manager midway to check in on the coaching process.
- A check-in meeting takes place between the Coachee, their Manager and the Coach.
- The progress report is completed by the Coach.

Phase Three: Conclusion

- Before the end of the coaching engagement, the Coach meets with the Coachee's Manager to discuss what he/she could do to reinforce and support the Coachee's behavioral change.
- Coach, Coachee and their Manager meet to review the coaching engagement, progress made and to discuss next steps (face-to-face). Coaching engagement may be extended
- Coach completes Coaching Summary Report and the engagement is concluded.
- Practice Managers share organizational themes emerging.

Stakeholders and Roles

We recognize that for any single coaching engagement there are multiple stakeholders, each with their own role, needs and expectations that must be met in order for an engagement to be successful from start to finish.

- **Coachee:** An employee of your organization. Someone who is viewed as a high-potential resource being groomed for leadership roles or someone in a leadership role whose performance you wish to make a committed investment in. Someone who has a strong desire to develop their potential, has a gap between where they are now and where they want to be, and is ready and willing to take action to achieve the results desired.
- **Coach:** A professional who has the knowledge and skills to partner with coachees to identify development goals and strengths to support the process of systematically eliminating obstacles, both internal and external to successful performance. It is our experience that most obstacles are, in fact, internal (i.e., attitudes, beliefs and habits that get in the way of being all that we are capable of being). This work is accomplished through a variety of coaching behaviors, among them:
 - Making direct requests to action
 - Being direct and honest about what is seen and heard during a coaching engagement
 - Expressing curiosity and challenges to what the coachee says and does
 - Deep reflective listening
- **Manager(s):** Committed to the success of the coachee overall and the coaching engagement specifically. An active participant in identifying and nominating the coachee for coaching, goal and expectation setting, data collection and periodic check-ins to ensure coachee is progressing in desired directions and at rates considered acceptable.
- **HR Stakeholders:** Committed to the success of the coachee overall and the coaching engagement specifically. An active participant in identifying and nominating the coachee for coaching, sourcing and matching a coach and facilitating communication between all other stakeholders to ensure coaching engagements are successful in the larger context of the sponsoring organization.
- **JDA Practice Manager:** Committed to the success of each coaching engagement and to coaching overall within the sponsor organization. Oversees and facilitates all aspects of coaching strategy and process in partnership with HR Stakeholders and Coaches. First point of contact between sponsor organization and coaches.

Confidentiality

Who is the Client?

Trust between Coach and Coachee is essential to the success of coaching at both the strategic and the individual engagement level. It is the key component of any coaching engagement that JDA contracts. A large part of establishing and maintaining trust stems from confidentiality. While JDA recognizes it is often employed by the larger organization (sponsor), **we consider the Coachee to be the client.** Anything shared by the coached employee within the parameters of the coaching relationship is shared in confidence. The Coach is responsible for protecting confidentiality of the client and may only share information that has been agreed upon with the Coachee. Before coaching begins, we require the Coach and Coachee to discuss confidentiality including how each of the following forms of information will be managed:

- Coaching goals
- 360° Feedback
- Performance reviews
- Interpersonal conflicts
- Details of the coaching discussions
- Proprietary or organizationally sensitive information
- Job hunting and career aspirations
- Coaching Engagement Progress & Summary Reports
- Individual Development Plan

The Practice Manager of JDA is bound by the same confidentiality standards. Information shared by the Coach with the Practice Manager will be done in confidence and used to analyze broader organizational themes. No information will be attributed to one individual.



Jeff Dorman

Overview

Jeff Dorman is President of Jeff Dorman & Associates, Inc. (JDA). He is an expert in Executive and Leadership Development, Team Coaching and Development, Organizational Effectiveness and Group Facilitation. He also leads over 100 programs a year on management and leadership development, team building, consultative selling and presentation skills.

Jeff's strategic approach combined with his collaborative style allows him to engage leaders and teams so they can achieve sustainable change. He applies strong consulting, process facilitation and coaching skills to help executives, their stakeholders and their teams solve problems and put ideas into action.

His focus on Leadership and Organizational Effectiveness, combined with his consumer marketing and sales experience, has helped JDA evolve into a company that is reshaping the way individuals develop themselves, and how organizations build their people and their business.

Background and Coaching Experience

As an executive coach for the last 20 years, Jeff has coached dozens of senior-level executives across a myriad of industries. He focuses on developing executives to ensure their growth is aligned with the vision, values and strategy of the organization in which they work. He has designed, managed and delivered innovative coaching projects for a variety of clients and serves as Practice Manager for JDA.

Jeff brings both external and internal experience as a consultant. Prior to starting JDA in 1989, Jeff spent over 15 years in marketing and sales management. During that time he hired, managed, trained and developed individuals and teams within the organization. In addition, he teaches courses at Cornell University.

Jeff earned his Masters Degree in Business Administration from the University of California, Berkeley and his Bachelors Degree in Business Administration from Cornell University. He lives in Princeton, New Jersey with his wife Deborah.

Representative Client Assignments

President, Manufacturing Firm facilitating business and strategy planning for cultural change initiative

Vice President, Retailer helping him transition to a new, more senior role in the organization

Vice President, Financial Services helping him improve his professional presence and impact in front of groups

Executive Leadership Team, Consumer Products coaching team to become high-performing and to reduce time to market by 40%

Qualifications

Masters in Business Administration with focus in Organizational Development from University of California, Berkeley

Bachelors in Business Administration from Cornell University

Certified in Tracom Social Styles® Assessment, DiSC, the Hogan Suite, Values and Challenges, The Five Dysfunctions of a Team training, Teams coaching

Areas of Expertise

- Conflict Resolution
- Executive Development
- Executive Presence
- High-Potential Development
- Leadership Development
- Targeted Skills
- Team and Group
- Transition/On-boarding

Recent Clients/Sectors

- Capital One
- Deutsche Bank
- GE Capital
- Kraft Foods
- The Kroger Company
- Meijer
- Merrill Lynch
- MetLife
- Morgan Stanley
- PLMA
- UBS

- Financial Services
- Consumer Products
- Healthcare
- Insurance
- Food Retailing
- Manufacturing



Kathy Auerbach

Overview

Kathy Auerbach is an expert in the field of executive coaching, organizational and talent development. Her 15 years of global experience primarily in financial services as a talent management executive as well as her Masters in Industrial Psychology, has provided her with a unique skill set that enables her to impact organizations on its various levels. Kathy uses her knowledge, in a practical and pragmatic manner, to help organizations achieve optimal performance results through their people. Kathy's strategic approach combined with her collaborative style allows her to engage with leaders and teams so they can achieve sustainable change. She applies strong consulting, process facilitation and coaching skills to help executives, their stakeholders and their teams solve problems, capitalize on opportunities and put ideas into action. Her passion to help individuals and organizations achieve optimal success, allows her to have impact in all she does.

Background and Coaching Experience

Earlier in her career Kathy headed the Leadership and Executive Development practice, including Global Coaching and Mentoring at Credit Suisse. In this capacity she designed, managed and delivered innovative leadership and human capital initiatives, including women's leadership programs. Kathy actively contributes and presents at The Conference Board and is published in "Coaching at Work" on the design and implementation of a strategic coaching practice. She has been an internal consultant for Investec, Plc in New York, London and South Africa, where she coached senior leaders and executives and managed the integration of various acquisitions and change initiatives. She has multiple certifications in organizational assessment and is a registered Organizational Psychologist in South Africa.

Kathy has lived in South Africa and London, and has been living and working in the US for the past 10 years. She currently resides in Manhattan with her husband and children.

Representative Client Assignments

Managing Director, Financial Services helping him transition into his new role and leading an effective team

Senior Director, Financial Services helping her improve her personal impact and interpersonal issues with her team and peers

Co-Heads, Architectural Firm working through their conflict areas and establishing a more optimal working relationship

Senior Leaders, Healthcare facilitate leadership, communications and cultural change initiatives

CEO & COO, Financial Services facilitate business and strategic planning session

Senior Leaders, Professional Services coached through acquisition and integration of a new business

Qualifications

Masters Degree in Industrial Psychology, University of South Africa

Certified in Myer-Briggs Type Indicator (MBTI); Lominger Products, the Hogan Suite and Acumen Leadership WorkStyle

Completing Newfield Network Coaching Certification

Areas of Expertise

Leadership & Top Talent Development

Managing Transition and Change

Reaching Success - Personally & Professionally

Strengthening Performance and Effectiveness

Team Alignment

Recent Clients/Sectors

Bloomberg

Corsair Capital

Credit Suisse

Deutsche Bank

Optum Health

Terrapin Bright Green

Financial Services

Healthcare

Professional Services



Genevieve Davy

Overview

Genevieve has more than 20 years experience in leadership and organizational development. Genevieve has successfully coached individuals and conducted initiatives in North America, Europe and Japan. Her 17 years experience working within global firms on talent and organizational development initiatives provides a rich understanding of business and organizational dynamics. This is coupled with her academic experience including an undergraduate degree in Business and a Masters in Organizational Psychology. This combination of experience enables her to effectively coach business leaders to better meet their personal career and professional goals.

Background and Coaching Experience

Genevieve provides coaching and leadership development support to global organizations across several business sectors. In addition to engaging in individual coaching, recent projects include designing and delivering leadership programs, team coaching, delivering organizational savvy programs, and partnering to launch global mentoring initiatives.

Prior to starting her consulting practice, Genevieve spent nine years with Citi. There, she held various roles including serving as an internal consultant to senior business heads in the corporate and investment bank as well as managing the leadership development curriculum for North America. She was also on the coaching faculty for Citi's senior-most leadership program sponsored by the CEO. Prior to Citi, Genevieve spent 3 years with the talent development team at Prudential Securities and 4 years in Human Resources at May Department Stores Company.

Genevieve lived in the New York metro area for 20 years and recently moved to Lexington, Massachusetts with her husband and two sons.

Representative Client Assignments

SVP Global Client Experiences, Technology Services helping her continue to lead effectively during organization's rapid growth and expansion

Global Regulatory Head, Manufacturing helped him transition roles and lead effectively in new business and geography

Head of Sales-Middle East Region, Manufacturing coached to improve interpersonal effectiveness with team and clients

Co-Head Investment, Financial Services coached to manage conflict and unify her leadership team

COO, Manufacturing coached through major restructuring of global team

Qualifications

BS in Business Administration-Marketing from Pennsylvania State University

Masters in Organizational Psychology, Columbia University-Teachers College

Certified in Marshall Goldsmith's Stakeholder Centered Coaching

Certified in Myer-Briggs Type Indicator (MBTI), Personnel Decisions International

(PDI) Profilor Series

Areas of Expertise

Career Development
Executive Coaching
Interpersonal Effectiveness
Leadership Development
Leading Teams
Organizational Savvy

Recent Clients/Sectors

AllianceBernstein
Citi
Chubb
Crimson Hexagon
Depository Trust & Clearing Corporation
Diversey, Inc.
Morgan Stanley
PPG Industries
Visiting Nurse Services of New York (VNSNY)

Financial Services
Healthcare
Insurance
Manufacturing
Technology Services



Karen Donaldson

Overview

Karen is an executive coach with expertise in leadership development, leadership competencies and training facilitation.

Karen coaches leaders in Fortune 500 companies to realize demonstrable results by aligning leadership development with strategic goals. For over 20 years, she has strengthened leaders' individual and organizational capabilities, performance and outcomes. Karen is dedicated to helping clients fulfill their potential. She uses a collaborative development process where clients take risks to achieve stronger results; and, develop versatile leadership skills.

Background and Coaching Experience

Prior to starting her consulting practice, Karen held global responsibility for succession planning for several of IBM's largest groups. She has human resources and change management consulting experience with Andersen Business Consulting; and, executive development, succession planning and corporate training experience with New York Life Insurance Company. She has spoken at conferences at Harvard University, Columbia Business School, New York University, and Diversity MBA Magazine. She was also an adjunct professor of Training and Development in the Graduate Human Resource Management program of Mercy College.

Representative Client Assignments

Internet VP, Consumer Products Company, coached on leadership strategies in a new position; skill building, increase influence productivity improvement with flexible managerial styles; and, plan for internet integration. The leader improved results, and gained stakeholder support for re-organization.

VP of Development, Global Media Company, coached to improve communication skills and relationship with manager. The executive effectively implemented leadership and communication strategies to meet goals.

Senior Attorney, Global Law Firm, coached to establish professional goals to reach next level. Development was targeted to influencing without authority, managing expectations to meet personal and professional targets.

VP, Investment Bank, coached to assist in effective management of key stakeholders, meeting development goals and leading team to achieve results

Qualifications

MBA in Management of Organization and Human Resource Management from Columbia Business School

BS in Communications from Syracuse University

Coaching certification in Stakeholder-Center Coaching

Expertise in Social Styles®, DiSC and 360° assessment

Areas of Expertise

Achieving Results through
Targeted Goal Setting
Leadership Skills
Leader Transition
Managing Change
Managing Power & Influence
Reaching Success - Personally
& Professionally
Strengthening Performance
& Effectiveness

Recent Clients/Sectors

Barclays
Citi
Deutsche Bank
The Financial Times
GE
IBM
Johnson & Johnson
KPMG
Morgan Stanley
Sealed Air
Spiegel brands

Consumer Product Companies
Law Firms
Professional Services



Christopher Marotta

Overview

Chris Marotta is an executive coach, facilitator and strategic consultant with more than 20 years of experience supporting leaders in Fortune 100 and 500 firms like Citigroup, Morgan Stanley and Nationwide Insurance, as well as working with leaders in local not-for-profit health and human services organizations. In addition to his coaching work, he advises leadership teams on talent strategy, organizational development and change management. He works with leaders at all levels and supports the pursuit of excellence across all functions. As a coach and consultant Chris consistently challenges his clients to balance their long-term vision with short-term execution. He is unique in his ability to constructively challenge clients to talk straight, take personal risks with integrity and make committed decisions that create change for themselves and their organizations.

Background and Coaching Experience

Chris began his career in process re-engineering with a global financial services firm advising leaders in operations and technology roles find real ways to improve service delivery. Helping leaders navigate the dilemmas they faced in this context led to a full-time focus on supporting people in leadership roles to hone their knowledge, skill and craft as leaders.

He has taken on multiple leadership roles in talent management organizations. Setting and driving the strategies and programs targeting top talent. In these roles Chris has lived the challenges many of his clients face in building strategy, creating credibility with C-Suite stakeholders, harnessing their buy-in and support and addressing the resistance and challenges that come with execution and change.

His coaching experience has allowed him to respect and support the challenges of newly minted managers to CEO's and has been a full-time practice for more than 15 years.

Representative Client Assignments

Managing Director, Financial Services helping him transition into his new role and leading an effective team as a producer/leader in Fixed Income

Senior Director, Financial Services helping her improve her personal impact and interpersonal challenges with direct reports and peers in a high pressure sales environment

Senior Leaders, Insurance responsible for setting and leading strategic change initiatives in a risk averse and traditional culture

Senior Leaders, Healthcare responsible for adapting their organization to a rapidly changing industry and competitive landscape

CEO & COO, Financial Services facilitating business and strategic planning and coaching through leadership challenges

Senior Leaders, Grocery/Manufacturing helping to transition to new roles and lead strategic dialogue across their organizations

Qualifications

BS in Business from Fairfield University

iCoach Coaching Certification

Member of the International Coaching Federation (ICF)

Certified in Myers-Briggs Type Instrument (MBTI), the Hogan Suite, Hermann Brain Dominance (HBDI) and a variety of other style and personality assessments

Areas of Expertise

Leadership and Top Talent Development
Managing Transition and Change
Reaching Success Professionally
Strengthening Performance and Effectiveness
Team Alignment

Recent Clients/Sectors

The Kroger Company
Morgan Stanley
Nationwide Insurance
United Jewish Appeal
VillageCare

Financial Services
Health Care
Insurance
Grocery/Manufacturing
Not-For-Profit



Karen Martz

Overview

In her role as Executive Coach and facilitator for over twenty years, Karen has been recognized for her ability to build confidence and engage individuals at all levels. Her focus is to sharpen leadership and communication skills and help create supportive and diverse work environments. Her process and commitment to excellence enables clients to capitalize on their strengths, make valuable contributions to their organization and foster more positive relationships. Her focus on competency development, performance management and effective meeting models has assisted Managing Directors and their teams at UBS, Morgan Stanley and Deutsche Bank to exceed their financial goals and growth objectives. Her coaching work has expanded globally to include assignments in London, Dublin, Geneva and Bermuda for insurance and financial companies. She has also provided sales and negotiation/influence skills coaching for a number of retailers.

Background and Coaching Experience

Karen's background includes regional management within the financial industry, positions in sales and retail customer service. She has served as coach for a number of Directors within the USDA targeting food safety program management, leadership skills, team building and employee development. Karen has also worked with Latin America country heads and the HR group within Johnson & Johnson on internal/external collaboration, coaching/feedback and organizational savvy. She has also worked with emerging talent, project managers and mid to senior level leaders within Baxter Healthcare, Wellpoint/Blue Cross and Blue Shield and CVS Caremark on topics ranging from managing perceptions to executive presence and presentation skills.

In the past, she also worked with a number of law enforcement agencies on stress management and quality of work life which she integrates into her current coaching practice. Her coaching has also taken her into the not-for-profit sector working with Directors of health care facilities and leaders of educational programs for those with learning challenges to retain talent and promote accountability throughout the facilities. Karen fondly calls Buffalo, New York home and enjoys travel adventures with her family, decorating and gardening

Representative Client Assignments

General Manager, Manufacturing Facility helping him promote employee engagement and transition into a new leadership role

CEO, Global Chemical Plant and the members of the management team to build trust, create alignment and develop more ownership across the organization during changing market needs and restructuring

Director Team, GM, Managers, Shift Supervisors; Global Publishing Distribution Center driving quality, safety and efficiency through improved communication and employee feedback/coaching

Managing Director and Staff, Global Editorial Group building style awareness and adaptability, enhanced listening skills and communicating clear expectations

Qualifications

BS with concentration in Psychology

Myers-Briggs Type Indicator (MBTI), Tracom Social Styles® Assessment; Emotional Intelligence (EQ) Assessment and Analysis; Kolbe Assessment of Natural Abilities and Instinctive Talents; Team Effectiveness Surveys; The Five Dysfunctions of a Team Assessment; Organizational Savvy/Strategic Influence Self-Assessment & Team Rater

Areas of Expertise

Executive Coaching
Leadership Development
Leading Teams
Interpersonal Effectiveness
Organizational Savvy

Recent Clients/Sectors

Booz and Company
Burberry
Corning, Inc.
CVS Caremark
Deutsche Bank
Estee Lauder
Johnson & Johnson
The Kroger Company
Morgan Stanley
UBS
USDA FSIS
VanDeMark Chemical
Wellpoint Inc. Blue Cross
and Blue Shield
Wells Fargo

Financial Services

Government

Healthcare

Pharmaceutical

Retail/Manufacturing Industry



Juan Pablo Mobili

Overview

Juan Pablo Mobili is an executive coach and leadership development consultant who promotes vision, agile collaboration and integrity of execution as critical elements for reaching ambitious organizational goals. He provides businesses in Latin America, Europe and the United States with customized senior team programs and executive coaching to accelerate innovation and coordination.

As a result of this, Juan has developed his own brand of individualized leadership coaching focused on providing leaders with a deep sense of their unique contribution, and the capacity to inspire themselves and others to unleash their leadership potential.

Background and Coaching Experience

The impact of Juan's approach, both as a coach and facilitator, is visible in his work with global companies, particularly as it relates to executing their strategies and developing a template for their next generation of senior leaders.

The coaching plans and programs he designs focused on examining attitudes that limit organizational resilience and provided tools and processes to achieve faster alignment and measurable talent development solutions for senior leaders and high-potential managers.

His efforts in organization renewal and the articulation of new strategic platforms have elevated cross-functional alignment and dynamic execution for companies such as Nike, GE, Danone, Coca-Cola, J&J, and for international banking and investment firms (Citigroup and UBS, among them), to increase people's capacity to navigate complex organizational politics and cause meaningful and lasting change.

Representative Client Assignments

Senior Faculty Member & Coach, Nike's Xcelerate, a global year-long talent development program for GM (Country and Category Managers) and VP levels

Designed and Facilitated Annual PAHO Conference (the Pan American Health Organization-the Americas chapter of the UN's World Health Organization) **executive teams**, the successful outcome of which was to define and align on their ensuing five-year strategy for Latin America

Hewlett-Packard Senior Managers and their Teams, coached throughout Latin America and the U.S., on developing strategies to accelerate their alignment process after the merger with Compaq

National Australia Bank Top 24 Executives, coached and facilitated sessions for to help them re-think the Bank's culture and strategic mission, in the face of 2009 economic crisis

Qualifications

Juan was educated in Argentina and the United States, with an emphasis on Philosophy of Language and Social Anthropology, and has translated professionally to and from English, Spanish, Portuguese and Italian.

He's certified in Hogan Suite of Instruments, FIRO-B, Korn-Ferry's Learning Agility Assessment, among others.

He has published poems, articles, and translations in literary and business publications in Argentina, Spain, and the US.

Areas of Expertise

Action Learning Projects
with Multi-Cultural Teams
Executive Presence
Leadership and Top Talent
Development
Program and Senior Meetings
Design
Strategy Articulation and
Cross-Functional Alignment
for Sr. Management Teams

Recent Clients/Sectors

Danone
Disney
Glaxo Smith Kline
Johnson & Johnson
KPMG
The Kroger Company
McDonalds
Microsoft
Nike, Inc.

Consumer Products
Financial Services
Healthcare
Manufacturing
Technology



Julie Naster

Overview

Julie Naster is an executive coach and senior consultant. She is known for her ability to help leaders develop authentic leadership presence that engages the leader's organization, produces measurable business results and solves ambiguous business problems.

She began her career as a chemical engineer. Early in her engineering career, she worked as a process and product engineer in ceramics manufacturing and food and beverage manufacturing; and as a consultant to the Department of Energy (DOE), providing project management, risk and safety analysis and NEPA documentation for environmental restoration and waste management programs at several DOE sites.

Background and Coaching Experience

Eighteen years ago, she began a quest to help individuals and organizations deliver extraordinary results AND bring meaning to work by fully utilizing their true gifts. During this time, she has coached, consulted and trained over 1000 leaders so they so can better address challenges in technical and general business environments.

In her work, Julie has observed that as engineers, scientists, financial experts and other leaders advance in their careers, they often run into non-technical, interpersonal challenges that impede progress when strategic thinking, influence, facilitation and leverage become critical. She has demonstrated that leaders experience dramatic improvements in their influence, results and personal satisfaction when they partner with a coach who helps them build self-awareness and learn, practice and master communication and collaboration skills.

Julie also works with leaders, their teams and their organizations in others ways: executive team development (mission, vision, operating principles); leadership training; strategy development; organizational assessment and development; program/project acceleration.

Julie resides in the mountains west of Boulder, Colorado.

Representative Client Assignments

Team Alignment, Aerospace Company and NASA facilitated successful alignment process launch and overcame widespread disagreements and barriers

Senior Engineer, Engineering Firm helping him develop non-technical skills to better grow his team and ensure the success of individual team members

Senior Engineering Manager, Engineering Firm helping him develop and implement a strategic approach to managing a large engineering function and successfully support the growth of the company

General Manager, Plant helping him strengthen his coaching skills to better develop an effective plant leadership team

Product Manager, helping him drive better results through more effectively leading and influencing across several organizations

Numerous teams, facilitating stronger relationships, agreements and sense of purpose to enable measurably stronger team performance

Qualifications

BA in American Studies from University of Colorado, Boulder

BS in Chemical Engineering from University of Colorado, Boulder

Certified in Myer-Briggs Type Indicator (MBTI); Newfield Network Trained Coach (basic & advanced levels); ICF Certified Professional Certified Coach

Areas of Expertise

Influence without Authority
Leader Transition
Personal Development to Succeed in Collaborative Organizations
Interpersonal Effectiveness
Leading Teams
Organizational Savvy
Career Development

Recent Clients/Sectors

Ball Aerospace
Columbia College of Chicago
Culinary School of the Rockies
Denver International Airport
The Kroger Company
NASA
University of Guelph
University of West Florida

Aerospace
Government
Higher Education
Manufacturing
Professional Services



Mimi Watson

Overview

Mimi is a corporate coach for executives and high potentials. Using a coaching approach that inspires executives to take constructive action by increasing awareness of the impact they have on others. Mimi's intent with each individual she coaches is to build a relationship based on honesty. Her clients choose the end result they wish to reach, working with them to create a pathway to reach their goal. Mimi's work focuses on talented, competent people who are ready to make a shift to greater scope, responsibility and contribution to their organization. Their organization values their staff and wants to invest in their future. They are often very good at what they do, but don't know how to take the leap.

Background and Coaching Experience

The foundation for Mimi's work comes from over twenty-eight years of experience in coaching, facilitating, training and modeling interpersonal skills to groups and teams. Mimi began her own quest to create meaningful work by helping people tap into their full range of options, as well as becoming better human beings.

During her career, Mimi has coached and trained mid to upper level executives and high potentials so they can better address challenges in all aspects of their work that impacts others. This includes coaching over 300 executives across technology, financial and food industries with the US and Internationally.

In addition to long-term relationships with eight different coaching firms, Mimi is on the faculty of the prestigious GE Advanced Facilitative Leadership Program, which address the needs for the next generation of leaders within an organization.

Mimi resides in Northern California with her beau Randy, her dog friend Sophie and her horse buddy Taji.

Representative Client Assignments

Vice President, Software Firm coaching him to give feedback and have difficult conversations, making his department to now be the most effective in the company

Equestrian Trainer, Sports coaching her in the areas of leadership and presence, resulting in the expansion of her business and gained credibility in her field

Vice President, Software Firm helping him with presentation skills and meeting facilitation, leading to a more engaging meeting experience for his associates

General Manager, Manufacturing coaching him with interpersonal skills and behaviors building a unified, problem-solving team

Director of HR, Software Firm helping him transition to a new, more senior role in the organization

Qualifications

BA from Manhattanville College in Purchase NY
Studied at Oxford University, Oxford England
Faculty, GE Advanced Leaders Network

Areas of Expertise

Change Acceptance Process
Coaching and Mentoring
Difficult Conversations
Essential Skills for Leaders
Executive Presence
Group Facilitation
Group Leadership
Leadership from the Inside Out
Negotiation Skills
Organizational Savvy
Social Styles®
Trainer Mastery

Recent Clients/Sectors

Apple
BHP Billiton
Citibank
Coverity
Genentech
GE Capital
GE Healthcare
The Kroger Company
Mobil Oil
Morgan Guaranty Trust
Morgan Stanley
PepsiCo
United Airlines

Bio-Tech
Energy
Finance
Food/Manufacturing
Healthcare
High Tech
Travel



We improve company performance by improving your people. On-site management and leadership training wherever you are.