

CAPABILITY STATEMENT

We're the experts at transforming talent into leaders at every level, cultivating *sustainable* high performance, and strengthening culture for bottom-line results.

WHO WE WORK WITH

FORWARD-THINKING ORGANIZATIONS

With more than two decades of experience working with these organizations, we help them develop their people and culture in a sustainable way – using an integrated approach of top-down and bottom-up, with a heavy emphasis on those mid-level future leaders of the company.

In working with us, our clients:

- Improve engagement, retention, and performance of their people, hi-potential millennials and also mid-level top talent they don't want to lose
- Increase the number of people ready for promotion when they need to be, for a stronger internal pipeline in succession planning
- Significantly improve the effectiveness of their leaders
- More effectively communicate and collaborate
- See ROI and bottom-line impact in energy, time, and money

CPA FIRMS AND PROFESSIONAL SERVICE COMPANIES

With more than a decade of experience working within the public accounting industry, we provide services and results like those noted above as well as services addressing numerous industry-specific challenges.

In addition to the above results, our professional service clients:

- Experience more energy and efficiency even during the busiest times
- Have retained their top talent who are great culture- and industry-fits, many of those people now understanding they can have great life integration even in a demanding industry
- Successfully leverage the generational differences in motivation and perspective
- Have found new perspectives for old challenges, resulting in innovative solutions

WE ALSO WORK WITH INDIVIDUAL EXECUTIVES AND MID-LEVEL LEADERS.

PAST CLIENTS INCLUDE:

- Fortune 500 companies
- Large global accounting firms
- Regional accounting firms
- Other financial institutions
- Midsize organizations
- Small businesses
- A variety of non-profit organizations: hospitals, schools, medical offices, global foundations, colleges
- Worksite wellness program providers
- Professional women's groups (within corporations and independently organized)



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**WITHIN THESE ORGANIZATIONS,
WE PROVIDE SPECIALIZED
PROGRAMMING FOR:**

- Executive Leaders
- Top Talent Mid-Level Professionals
- Professional Services Teams
- Professional Women

HOW WE WORK WITH OUR CLIENTS

- 8-12 Month Programs
- Workshops & Trainings
- Consulting
- Executive Coaching
- Strategic Planning & Cultural Direction
- Executive Round Tables
- Meeting Facilitation
- Organizational and Team Assessments, Analysis, and Innovative Solutions
- Train the Trainer



SOME OF THE MANY TOPICS WE FACILITATE:

- Identifying & Implementing the "right" cultural shifts for your organization
- What it takes to be a strong leader and role-model
- The foundation for sustainable energy, engagement, and productivity
- Personal and professional life integration and alignment
- Connecting purpose and meaning to work
- Identifying and eliminating energy drains
- The best ways to restore your energy
- Implementing habits for long-term change
- Time management and prioritization
- How and why to cultivate a positive culture, including addressing negativity and the helpless-to-make-change attitude
- The importance of self-awareness
- Confidence, specifically addressing self-doubt and indecision
- Perfectionism, specifically addressing "I'm not good enough," fear of failure/judgment, and using discernment with effort and time
- Guilt
- Communication, including up, down, lateral- internal and external to the company
- Difficult conversations and conflict resolution
- Giving and receiving constructive feedback
- Setting expectations
- Effective delegation
- Managing millennials
- Optimally leveraging generational differences, strengths, motivations, and perspectives
- Building relationships
- Being "CEO" of your career

