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SERVICES

Executive Coaching

Three processes to choose from

We offer three coaching options, each differing in format and level of intensity:

	Coaching Option	Service Provided	Specifics
1	FULL COACHING	Intensive targeted work over 4-7 months to achieve significant skill development, behavior change, and/or performance improvement	• One monthly half-day session in person, with weekly phone calls scheduled in between • Additional calls and meetings, as required • Minimum three month commitment required from client
2	SUPPORT COACHING	Less intensive follow-on from a Full Coaching process to support and sustain the application of newly acquired behaviors and skills Can be taken as a stand-alone option, instead of Full Coaching first.	• Two scheduled phone calls per month, with additional calls, as required • Phone-based sessions only • Minimum three month commitment required from client when taken as a stand-alone process
3	TRUSTED ADVISOR	Open-ended, client-initiated conversations on an as-needed basis to explore and problem-solve around challenging leadership-related issues	• Contracted for a three-month period at a time • Phone-based discussions only • 100% client initiated contacts • No limit on number of calls or duration

"We have found your coaching to be an effective development strategy for both managers and leaders in our organization, especially in situations that call for a targeted approach."

Rob Browning, CAO, Municipality of Chatham-Kent

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EXECUTIVE COACHING (CONT.)

What is Leadership Coaching?

Leadership Coaching is a series of periodic one-on-one consultations, in person or by phone, between a manager and his or her coach. The coaching process typically lasts anywhere from three to seven months but, depending upon the complexity of the issues, may continue several months longer. Generally–but not always–it begins with administration of a 360º feedback assessment prior to concentrated work with the coach.

You should look at coaching as a focused, "scalpel" strategy for the leadership development of an individual manager. For coaching to succeed, there must be two commitments established up-front:

1. By the *individual manager* to work hard to achieve the agreed-upon outcomes.
2. By the *organization,* particularly the manager's immediate boss, to support his or her efforts in every way possible.

Coaching begins by clarifying among the manager (i.e. the "client"), his/her immediate boss, and the coach the agreed upon measurable or observable outcomes of the process. Frequently a representative of Human Resources is also involved.

Between coaching sessions the manager applies newly learned approaches, skills, and behavior at work, observes the impact, and then with the aid of the coach refines his/her approach accordingly.

What are the benefits of coaching?

- The manager zeroes in on the specific skills and behaviors that are essential to his/her ability to perform.
- Desired behavior change takes place quickly due to immediate, real time application of learning back on the job.
- The manager begins to demonstrate improved results very soon.
- Greater productivity, higher morale, and lower turnover among the manager's staff, due to his/her improved effectiveness as a leader and communicator.

Where can Leadership Coaching really make a difference?

1. **When performance as a leader is not meeting expectations.**

   For example:
   …A key individual at a relatively senior level in your organization has reached a critical juncture. On one hand, his strong technical knowledge and experience means he has a lot to contribute. On the other hand, his interpersonal style is seriously limiting his ability to work effectively with others. Despite discussions you have had with him, he doesn't seem to know how to make the needed changes. You don't want to let him go but the negative impact of his style is now outweighing the positive elements he contributes to the organization.

2. **Developing skills for growth in current and future positions.**

   For example:
   …A strong performer was recently promoted, transferred or hired into a new challenging leadership role, one that is stretching her talents.

   Or, perhaps you have an identified "high potential" employee who has been in her current role for a while and it is now time to prepare her for advancement to a more complex leadership role.

3. **Senior leader seeks a trusted advisor.**

   For example:
   …A leader has few, if any, people with whom he can talk candidly about the challenges he faces. Rather than needing regular, focused coaching conversations, what he wants is to be able to contact a coach/advisor on an ad hoc basis whenever he confronts a demanding situation or has an issue he wants to kick around and get advice on.

What needs to be in place for your investment in coaching to pay off?

Five Questions to ask before investing in coaching:

1. Will the identified changes result in significantly better performance results?
2. Is customized development required (vs. sending him/her on a skills training seminar)?

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EXECUTIVE COACHING (CONT.)

3. Are the development issues sufficiently complex to call for focused guidance over a period of time
4. Is the individual genuinely willing (i.e. without feeling coerced) to be coached?
5. Are there circumstances involved that call for a private approach, sensitivity, and confidentiality?

What is Fulcrum's process for Leadership Coaching?

To quote management expert Peter Block, "We are born on the wrong side of our eyes." Our approach is to enable the client to see his or her own behavior, from outside himself/herself. *We work not just at the skill and behavior level. We also bring into the process the client's assumptions, attitudes, habits of thought, and values* which combine to significantly drive his/her behavior.

Our instruments of choice are The Leadership Circle Profile (http://www.888fulcrum.com/leadership-programs/the-authentic-leader/tlcp/) and the Myers-Briggs Type Indicator®.

[Note: See summary table, above.]

1. Full Coaching

Because each coaching client (i.e. manager) is different, each coaching assignment is different. Typically, however, we begin by identifying the client's behavior change objectives, current leadership style and its impact on his or her performance.

This includes a 360º feedback assessment plus, on occasion, gathering the perspectives of peers and/or staff through one-on-one interviews by the coach.

Coaching sessions may include any of the following:

- discussions
- role playing
- skill modeling by the coach
- observing the client in action (e.g. meetings, typical interactions)
- coach's feedback
- challenges to client's existing perceptions, beliefs and approaches
- support and encouragement

The particulars:

- **Includes one monthly half-day face-to-face session, with weekly phone consultations in-between. Phone consultations typically last from 60-90 minutes.**
- On occasion, if indicated for the client's progress, an extra meeting may be scheduled to observe him/her in action and provide feedback.
- We require from the client and his or her boss an up-front commitment to a minimum of three months of coaching.
- Additional months are contracted for as needed, depending upon progress and still untapped opportunities. This is determined by the client and the manager, with input from the coach and perhaps from HR.

2. Support Coaching

This is conducted totally over the phone. It is designed to provide an alternative to the intensity and comprehensiveness of the Full Coaching option. For this reason, Support Coaching is perfect for a mid-level manager or for a senior leader who needs to develop in just a couple of skill or behavior areas.

As well, this level of coaching is a natural follow-on from our Full Coaching process, helping the client over an extended period of time integrate newly acquired skills and approaches into his/her leadership style.

The particulars:

- Includes a minimum of one scheduled phone consultation every two weeks, plus additional phone consultations, as required.
- When not taken as a follow-on from Full Coaching, we require from the client and his or her boss an up-front commitment to a minimum of three months of coaching.

3. Trusted Advisor

This is a flexible, non-directive service intended especially for executives, senior managers, or business owners. The client can set up a phone call at any time. There is no limit to the number of calls or their duration, while accommodating the competing scheduled commitments of the coach.

Initiating a discussion lies entirely with the client. The coach will make himself available for a conversation on as short a notice as possible. Topics are the choice of the client. Typically they address a challenging leadership-related situation or an issue the client wishes to explore and get advice on.

SAMPLE OF CLIENTS SERVED:

AGF Funds Inc.
Bank of Nova Scotia
BEP International (reinsurance brokers)
Canadian Imperial Bank of Commerce
Capital One Financial Corporation
Citigroup
Credit Suisse Canada
Credit Union Central of Ontario
Deloitte & Touche
Fannie Mae
First City Trust
MBNA America Bank
North American Life Assurance Company
Platt's (Standard & Poor's)
The Prudential Insurance Company of America
The Royal Bank of Canada
The Universal Group of Funds
Visa Canada Association
William M. Mercer Limited

WE ARE A LEADERSHIP DEVELOPMENT FIRM DEDICATED TO HELPING OUR CLIENTS LEVERAGE THE TALENTS OF THEIR MANAGERS AND TEAMS.

We offer training workshops, facilitation services, keynote presentations, and executive coaching that help managers generate consistently high performance by (1) fostering commitment and accountability in their employees and (2) building productive teams.

Our clients include organizations from the corporate, public, and not-for-profit sectors, as well as associations. They know Fulcrum for programs that:

- Present cutting edge concepts and practical techniques,
- Apply interactive adult learning approaches and
- Energize people to deliver superior results

Fulcrum Associates Inc. was founded in 1988. We are a continental firm, headquartered in Northern Virginia, with an operation in Toronto. For projects large or small we are able to draw on the talents of a select number of highly professional associates, each heading a successful independent practice, who deliver programs tailored for today's organizations.

IAN IS AN EXPERIENCED PRESENTER, GROUP FACILITATOR AND EXECUTIVE COACH.
Through his keynote presentations, highly interactive workshops, and custom-designed team-building practice, he helps his clients leverage their investment in their managers and teams.

He works primarily with managers, mid-level to executive. His programs introduce cutting-edge skills and concepts around transforming managers and supervisors into leaders and fostering superior team performance

Ian began his independent practice in 1988, following seventeen years of corporate experience in both the high tech manufacturing and transportation industries.

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