

# FOR LEADERS AND LEADING ORGANIZATIONS

Leading Resources Inc. (LRI) is dedicated to developing leaders and leading organizations. Our focus is on helping clients navigate change successfully. Serving the public, private, and non-profit sectors, LRI specializes in helping clients achieve real, meaningful change via strategic planning, governance development, leadership coaching, business process improvement, and performance management.

In particular, we:

- Design and lead strategic planning processes that result in significant improvements in organizational performance.
- Provide leadership workshops and leadership coaching, resulting in higher levels of professional performance and fulfillment.
- Help organizations achieve significant improvements in their business practices and processes, resulting in higher levels of effectiveness and success.
- Help Boards of Directors develop effective governance processes, systems and policies.
- Develop balanced scorecards, integrated performance measures, and other systems to align individual and organizational success.

## History and Core Values

Leading Resources Inc. (LRI) was founded in 1998 in Sacramento, and is dedicated to developing leaders and leading organizations. LRI is has grown steadily since its founding and today serves clients across the United States and around the world.

LRI operates under the following set of core values:

- We act ethically at all times and build trust with our clients and each other.
- We serve our clients with utmost attention to quality and customer service.
- We partner with our clients to create real, meaningful change.
- We deliver our services in easily accessible, innovative ways.

We develop services, products and processes that provide measurable benefits.

# OUR FIVE PRACTICE AREAS

Leading Resources Inc. (LRI) is organized into five practice areas: Strategic Planning, Governance, Leadership Development, Performance Management, and Process Improvement. Using our expertise in business management, we focus on these five dimensions of change to create high value for our clients.

## **1. STRATEGIC PLANNING**

We design and lead strategic planning processes that ultimately result in tighter alignment and significant improvements in organizational performance. As part of the process, we:

- Develop purpose, core values, mission, and vision.
- Facilitate board of director, staff, and work group communication.
- Identify goals and objectives with board and staff.
- Ensure measurable results by developing a clear, ambitious, and achievable strategic plan.

## **2. GOVERNANCE**

We help boards of directors develop clear and effective governance systems and policies that clarify the roles of the board and of staff. When working with Boards, we:

- Assess the current form of governance – and its pros and cons.
- Define the appropriate role of the governing body within the organization.
- Develop the purpose of the board, the roles and functions of committees, and ethical codes of conduct.
- Improve board-staff linkage through the delegation of authority to management.

## **3. LEADERSHIP COACHING**

We provide one-on-one coaching and team coaching that result in higher levels of leadership, communication, professional performance and fulfillment. Specifically, we:

- Provide individual leadership coaching to help leaders achieve meaningful growth in their skills and capabilities.
- Ensure that leaders have the right talent on board to achieve strategic goals.
- Develop team leadership by improving communication, developing sound operating principles, and creating clear measures of success.
- Facilitate leadership transition and ensure that the organization supports the goals of new executives.

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#### **4. PERFORMANCE MANAGEMENT**

We help companies develop systems of performance management to assure clear alignment between individual and organizational success. In the performance management process, we:

- Define long-range measures and targets, building clarity around vision and goals.
- Facilitate the development of a balanced scorecard tied to their strategic plan.
- Create an integrated system of performance management measures that cascades throughout the organization.
- Develop an ongoing monitoring process to assure that communication about performance measurements results in learning.

#### **5. PROCESS IMPROVEMENT**

We help organizations analyze and re-invent their business processes, resulting in higher levels of communication, effectiveness, and overall performance. To improve business processes, we:

- Develop a coherent and insightful picture of both the current state of the business process and the outcomes desired.
- Implement improvements in business process through facilitation, organizational planning, project management, and team development.
- Design and manage a plan for change for cross-functional teams.
- Facilitate changes in organizational structure.

## SELECTED LIST OF CLIENTS

LRI works with a wide range of non-profit organizations, public agencies, and corporations. The following is a partial list of our valued clients.

### Corporations:

- Dupont
- HSBC Bank
- PHH
- Sprint
- Sutter Health
- Synergex
- Teichert
- Wells Fargo Bank
- Westlake Financial Services

### Non-Profits:

- California Alliance for Arts Education
- California Institute of Mental Health
- The James Irvine Foundation
- KQED - San Francisco
- The M.I.N.D. Institute
- Natural History Museum of Los Angeles County
- Otis College of Art and Design
- Sacramento Ballet
- Sacramento Region Community Foundation
- Sierra Health Foundation
- UC Davis Medical Center
- YMCA of Los Angeles

### Public Agencies:

- California Board of Equalization
- California Conservation Corps
- California Court System
- California Department of Health Care Services
- California Earthquake Authority
- California Environmental Protection Agency
- California State Auditor (Bureau of State Audits)
- California State Parks
- California State University
- CalPERS
- CalSTRS
- City of San Jose
- Lower Colorado River Authority
- Sacramento Municipal Utility District (SMUD)
- University of California
- University of Southern California
- U.S. Forest Service

## CONSULTING TEAM

### ERIC DOUGLAS



Eric Douglas is LRI's principal consultant with expertise in strategic planning, governance development, and change management. Mr. Douglas is an internationally recognized expert in organizational communication. Mr. Douglas has consulted for Fortune 500 companies, government agencies, and non-profit organizations. He is the author of two acclaimed books, *Leading at Light Speed*, on high-performing companies, and *Straight Talk*, on the advanced skills of productive communication. Mr. Douglas has also written numerous articles and leadership tools – used by more than 6,500 consultants and managers internationally. Educated at Harvard University, he is president and CEO of LRI.

### KARIN BLOOMER



Karin Bloomer is a senior consultant specializing in strategic planning and organizational development. She has focused her 15-year career on improving the efficiency of government processes and maximizing the value of government services. She has applied her analytical and communication skills to projects in strategic planning, performance measurement and management, organizational assessment, process analysis, and facilitation. She has assisted a wide variety of government departments in determining their operational and strategic effectiveness and utilizing performance measures to improve mission-critical services and programs. Mrs. Bloomer earned a Master of Public Policy from the John F. Kennedy School of Government at Harvard University. She also holds a Bachelor of Arts in English from Wesleyan University.

### ROBERT EMERSON



Robert Emerson (“Emerson”) is an organizational consultant with over 20 years of experience in developing individuals and teams and facilitating organizational change management. He has designed and implemented change management strategies that align people with large organizational redesign and re-engineering efforts. He also coaches leaders to develop their skills and behaviors so that they further the organization’s core values, vision, and goals. Emerson obtained a B.S. in Public Administration and a Masters in Counselor Education from San Diego State University. He holds certification in industrial/organizational psychology with a focus in executive coaching.

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## MARCIA TENNYSON



Marcia Tennyson is a senior consultant with LRI, specializing in organizational development, performance improvement and team development. Ms. Tennyson serves clients in a variety of capacities, including strategic planning, organizational development, business planning and team training. Ms. Tennyson has experience in applying her skills to a range of different business sectors, including healthcare, government and non-profits. Ms. Tennyson earned a Master of Business Administration from the U.C. Davis Graduate School of Management, with concentrations in marketing and organizational development. Ms. Tennyson also holds Bachelor of Arts degrees in Economics and Spanish, also from U.C. Davis.

# LEADERSHIP WORKSHOPS

At the team and group level, LRI offers an outstanding series of workshops that we can deliver either directly or as train-the-trainer. Our line-up of workshops includes:

## **1. LEADING AT LIGHT SPEED**

What distinguishes great organizations from others? What are the things that leaders should focus their attention on? In this workshop, participants focus on ten "quantum shifts" that result in high performing organizations. Using tools, exercises, and case studies, you'll learn how to:

- Align the core values
- Lead through others
- Sharpen the focus
- Manage decisions well
- Accelerate the pace of change
- Stimulate creative flow
- Spread systems thinking
- Communicate in "12-D"
- Start with yourself
- Help people assume responsibility

## **2. HABITS OF HIGHLY EFFECTIVE TEAMS**

Great leaders all know that a key to obtaining optimum results lies in developing highly effective teams. This workshop will cover the five habits of highly effective teams and assist leaders in understanding their role in the development of teams. Participants learn:

- The habits of highly effective teams model
- How to assess teams
- How to determine specific steps in moving teams to higher levels of effectiveness

## **3. SYSTEMS THINKING LEADS TO ACTION**

In this workshop, you'll learn practical techniques to spread systems thinking and accelerate the pace of change at every level of the organization, including:

- Systems thinking frames
- Development of systems to achieve performance targets
- "Outside the box" alternatives to resolve current business process problems
- Testing systems solutions and the commitment to continuous improvement

## **4. CORE VALUES AND PERFORMANCE**

In this workshop, you'll learn how to align the core values of your organization, sharpen the strategic focus, and develop performance measures, including:

- Use of the Six Rings Integrated Strategic Planning® tool
- Clarification of the purpose for the organization
- Differences between organizational, individual, key, and core values
- Agreement regarding behaviors that support the core values
- Customized performance scorecards throughout the organization

### **5. LEADING THROUGH OTHERS**

In this workshop, you'll learn about how trust and spark translate into performance development and stimulating the creative flow throughout the organization, including:

- Effective meeting management
- Facilitation skills
- Resolving group conflicts
- Using the G.R.O.W. model for professional development
- Creating high-performing teams

### **3. STRAIGHT TALK<sup>®</sup>**

LRI offers three Straight Talk workshops. These workshops teach participants about communication styles, effective decision management, and conflict resolution.

#### **COMMUNICATION STYLES**

The first of our Straight Talk<sup>®</sup> workshops teaches leaders, managers and teams how to be aware of their communication style and improve their interactions with others. Using tools, exercises, and case studies, you'll learn to:

- Identify your communication style
- Learn how your style affects others
- Work with different styles
- Improve your interactions with others
- Identify the style of someone you've just met
- Flex your leadership style to be more successful
- Become a more effective leader

#### **MANAGING DECISIONS**

Our second Straight Talk<sup>®</sup> workshop teaches leaders and teams how to make sound decisions. Participants learn:

- The five types of decisions
- Managing effective decision processes
- When consensus is appropriate - and how to achieve it
- Using "deep consultation"
- The "Chain of Resolution"
- Techniques for making tough decisions
- Multi-lateral decision-making involving independent entities

#### **RESOLVING CONFLICTS**

The third Straight Talk<sup>®</sup> workshop teaches leaders and managers how to resolve conflicts productively - before they create pain and expense for the organization. Participants learn:

- The productive value of conflict
- How to minimize inter-personal conflict
- The importance of addressing conflicts early on
- How to identify assumptions
- How to defuse personal tensions by focusing on assumptions
- How to resolve conflicts productively using the "chain of resolution"



## TESTIMONIALS

### **PHH**

“We had a difficult challenge facing us in articulating a clear vision. I don't think we would have gotten there without LRI's help.”

– George Kilroy, CEO

### **WETA**

“Thanks to LRI, we have consensus about the next steps we need to take and performance metrics that will let us know when we reach our goals. We've really moved forward as an organization.”

– Sharon Rockefeller, CEO

### **UNIVERSITY OF CALIFORNIA**

“As a result of LRI's work, we experienced a real change in the way that we do planning and resolve problems.”

– James H. Clark, Director

### **THE HLA GROUP**

“Working with LRI, our executive team has a richer and clearer understanding of what we need to do to succeed.”

– John Nicolaus, Principal

### **HSBC BANK**

“LRI has helped our executive team, including our chairman, build and enhance its communication skills, gain agreements around key strategic questions, and pull away at the fabric surrounding various internal conflicts and resolve them in constructive ways.”

– Pat Wilkinson, Senior VP of Human Resources

### **AMERICA'S PUBLIC TELEVISION STATIONS**

“Based on their work with public broadcasting CEOs, LRI's expertise is a must for any organization that wants and needs productive conversation to resolve tough issues.”

– David Brugger, President

### **BICKMORE RISK SERVICES**

“LRI was instrumental in leading us through challenging strategic decisions.”

– John Chaquica, CEO