



## FOR LEADERS AND LEADING ORGANIZATIONS

Leading Resources Inc. (LRI) is dedicated to developing leaders and leading organizations. In particular, our firm:

- Designs and leads strategic planning processes that result in significant improvements in organizational performance.
- Helps companies develop effective governance and decision-making processes, systems and policies.
- Helps organizations achieve significant improvements in their business practices and processes, resulting in higher levels of effectiveness and success.
- Develops integrated performance measures, balanced scorecards, and other systems to align individual and organizational success.
- Provides leadership coaching to both individuals and teams, resulting in higher levels of professional performance and fulfillment.

### History and Core Values:

Leading Resources Inc. (LRI) was founded in 1998. LRI has grown steadily since its founding and today serves clients throughout California, the United States and around the world.

LRI operates under the following set of core values:

- To act ethically at all times and build trust with our clients and each other.
- To serve our clients with utmost attention to quality and customer service.
- To partner with our clients to create valuable outcomes.
- To research and develop services, products and processes that provide measurable benefits.
- To deliver our services and tools in easily accessible, innovative ways.

# OUR FIVE PRACTICE AREAS

Leading Resources Inc. (LRI) has five practice areas. We focus on these five dimensions of change to create high value for our clients and client companies.

## **1. STRATEGIC PLANNING AND CHANGE MANAGEMENT**

We design and lead strategic planning processes that result in the development of a coherent strategic plan, typically combined with an implementation or action plan. Our planning processes assure strong alignment within the organization and significant improvements in organizational performance. Specifically, we:

- Conduct thorough scans of both internal and external stakeholders in order to identify important issues and planning factors to consider.
- Facilitate board of director, staff, and work group interactions and communication.
- Train teams in strategic thinking.
- Develop purpose, core values, mission, and vision.
- Identify goals, strategies and objectives, tied to clear action steps and measures of success.
- Develop clear written documents that are easy to understand and use.
- Facilitate communication to assure understanding and support among both internal and external stakeholders.

## **2. GOVERNANCE AND BOARD DEVELOPMENT**

We help companies develop effective governance and decision-making processes, systems and policies. In particular, we work with boards of directors to clarify the roles of the board and of staff. Specifically, we:

- Assess the current systems and forms of decision-making and governance – and its pros and cons.
- Help develop new governance mechanisms and systems, as appropriate.
- 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, management, professional performance and fulfillment. Specifically, we:

- Provide individual leadership coaching to help leaders achieve meaningful growth in their skills and capabilities.

*(Continued on back)*

- Conduct interviews and provide objective feedback to leaders and managers to facilitate their awareness both of their strengths and of their growth areas.
- Ensure that leaders have the competencies needed to achieve the organization's strategic goals.
- Develop specific skills in managing and making tough decisions, building effective teams, and creating clear measures of success.
- Facilitate leadership transitions and ensure that the organization supports new executives.

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

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

- Define long-range measures and targets, building clarity around vision and goals.
- Facilitate the development of a balanced scorecard or other measurement systems.
- Create an integrated system of performance management measures that cascades throughout the organization to the individual level.
- Develop positive communication and monitoring processes to assure that performance measurement results in ongoing learning and performance enhancement.

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

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

- Analyze the current state of the business process and compare it to benchmarks, where possible.
- Develop a coherent and insightful picture of both the current state and the outcomes desired.
- Implement improvements in business process through facilitation, organizational planning, project management, and team development.
- Design and manage 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
- Escape Technology
- 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 Department of Managed Health Care
- California Earthquake Authority
- California Environmental Protection Agency
- California State Auditor (Bureau of State Audits)
- California State University
- CalPERS
- CalSTRS
- City of San Jose
- Lower Colorado River Authority
- Napa County Health and Human Services
- 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.

### 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.

*(Continued on back)*

## RANDALL HARRIS



Randall Harris is a senior consultant who brings over thirty years of organization effectiveness, talent management, leadership and employee development, change implementation and business transformation expertise to some of the world's most admired companies. Randall is highly skilled in working with leadership teams across all functions to build and sustain organizations that are committed to innovation, employee engagement, and peak performance. Randall earned a Master of Science in Human Resource Management from Chapman College. Randall also holds a Bachelor of Arts degree in Counseling Psychology from the University of California, Santa Cruz.

## 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.

# LEADERSHIP WORKSHOPS

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. TEN KEYS TO HIGH PERFORMING ORGANIZATIONS**

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

- Align people around clearly understood core values
- The importance of leading through others
- How to accelerate the pace of change
- How to build trust and encourage innovation

## **2. THE FIVE HABITS OF HIGH PERFORMING BOARDS**

This workshop teaches Board members the habits that lead to a high functioning Board. The workshop helps both Board members and senior staff better appreciate the behaviors of an effective Board. The five habits are to:

- Cultivate the Board as a distinct entity
- Focus on results – and on monitoring results
- Assure resources are available – and that resources are managed effectively
- Develop the Board so it can effectively serve the organization's needs
- Provide support and feedback to the chief executive

## **3. THE FIVE HABITS OF HIGHLY EFFECTIVE TEAMS**

Successful leaders know that a key to obtaining optimum results lies in developing highly effective teams. This workshop covers the five habits of highly effective teams and assists leaders in understanding how to develop effective teams. Participants learn:

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

## **4. STRAIGHT TALK®**

Our Straight Talk® workshop 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 communication style to be more successful
- Use an understanding of communication styles to resolve conflicts



# TESTIMONIALS

## **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

## **EARLY EDGE CALIFORNIA**

“The counsel I received from LRI on communication and change management allowed me to successfully lead my organization through critical decision points. LRI helped me ask the right questions and assess whether my organizational capacities matched those required to drive our desired strategies.”

—Deborah Kong, President

## **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

## **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

## **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