

# ORGANIZATIONAL SOLUTIONS



BUILDING GREAT  
TEAMS, CULTURES  
FOR INNOVATION,  
AND WORKPLACES  
THAT THRIVE

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HOW SATISFIED ARE  
YOU WITH HOW YOUR  
ORGANIZATION PERFORMS?

HOW SATISFIED ARE YOU  
WITH THE WAY LEADERS  
SUSTAIN EXCELLENCE?

**It's not enough to be satisfied.**

**More is possible.**

**That more starts and continues with and  
through your people.**



**We help organizations face each of these conditions. Each is a pain point that blocks desired results. We see at least one and often more of these conditions in companies of all sizes and industries.**

## CONDITIONS OF DISSATISFACTION

### **Being “ok” or satisfied with status quo**

- Thinking that good enough is
- Tolerating that no one stretches
- Accepting a “not my job” mentality

### **Unproductive interpersonal drama**

- Stimulating self-protective behavior
- Encouraging competition with peers for survival
- Condoning politics to determine whose team to be on

### **Resistance to learning**

- Being attached to expertise
- Needing to maintain identity and status
- Protecting knowledge is the enemy of learning

### **Workforce inertia**

- Allowing incivility that disheartens effort
- Filtering listening to catch leaders doing something wrong
- Turning a blind eye to disloyalty and manipulation





These conditions of dissatisfaction are part of being in an organization. We have valuable solutions to restore and sustain thriving that we deliver in these three areas:

### **Professional Coaching**

- Executive Level Leaders
- High Potential Executive Leader Candidates
- Team Leaders
- Teams & Groups

### **Learning and Development Programs**

### **Culture Consulting: Coach-Centered Culture**

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## **What is Generative Wholeness ~ The GW Way?**

Adopting the dynamic capacity to originate, create, learn and produce results in order to be sovereign, the freedom to express and choose, personally and professionally, from our authentic self.



## PROFESSIONAL COACHING ~ THE GW WAY

*“Coaching turns problems into challenges, challenges into opportunities and opportunities into gifts.”*

— Albert Einstein

The purpose of professional coaching is to deepen learning about ourselves so that we can forward action toward what is important and what we most want. Professional coaches challenge our assumptions and habits of expression so that we gain awareness, clarity, and alignment to make choices that maximize our potential.

We provide coaching for individual leaders and the teams they support — plus the measurement tools to ensure successful, sustainable development. Focusing on character development, generative coaching boosts critical leadership competency by 20%-30% toward realizing essential organizational goals.

- Discover awareness and clarity for how to move beyond current competence toward agility.
- Build discipline for self-development that is relevant to organizational role and expected outcomes.
- Accelerate realizing potential that fuels expansion of your role in terms of scope and scale.
- Strengthen relationship competence that creates a positive workplace and fulfills what employees intrinsically seek for job satisfaction.
- Instill a mindset for being generative and whole as a leader in order to sustain excellence.



## BENEFITS

### **Real Time Intervention**

Results happen without an expensive off-site and/or multi-day training program. By investing as little as two hours in a month, the leaders can start applying the learning immediately to their existing work, experiment and course correct as they go with the support of a trusted partner to strengthen critical thinking and reflection.

### **Sustainable Progress**

Coaching addresses the whole person and facilitates a deeper understanding of the issues blocking creativity, learning and producing new and more original results. That's why the change it brings is more authentic and sustainable.

### **Impact Beyond Immediate**

Coaching outcomes influence those around the leader resulting in a sovereign workplace climate in which all team members thrive.

THAT IS THE  
GENERATIVE WHOLENESS  
PROMISE!



# MEET THE INVITECHANGE TEAM OF GENERATIVE WHOLENESS PRACTITIONERS



## John S. Arnold, PCC Generative Wholeness Practitioner

John's clients are executive leaders who have recognized a need and have the desire to enhance their personal and leadership effectiveness. John excels in the application of executive coaching, leadership development, consultative sales management, team building, and multi-site business management. An expert in leadership development and change management, John has designed, delivered, and facilitated strategic planning retreats; team chartering and alignment work as well as supported mission, vision work and guided organizational change projects.

### Location

Coral Springs, FL USA

### Industry Specialties

- Healthcare
- Manufacturing
- Commercial Services
- Aerospace
- Real Estate

### Areas of Expertise

- Executive Presence
- Leadership Development
- Organizational Health
- Multi-site Management
- Strategic Thinking
- Organizational Change

### Client Partners

- Alltel Information Systems
- Bright House Networks
- Devereux Florida
- Equity Residential
- HEICO Aerospace
- Merck
- Newell Rubbermaid
- Pernod Ricard
- Ryder Systems
- SearchAmerica, Inc.
- Skanska
- Yahoo

### Experience

For over 25 years, John has worked in the field of leadership and organizational development, helping executive leaders expand effectiveness and develop breakthrough strategies to meet the challenges of leading change in their organizations. Articulate and creative, John uses his personal instinct, 25 years of corporate leadership experience, and a unique leadership style to challenge individuals and organizations to define themselves and then achieve their personal and professional goals.

### Education/Credentials

John holds a Bachelor of Arts degree in Economics from Marymount College, Salina, Kansas. John is an International Coach Federation member with 6500+ hours of experience primarily in organizational and executive leadership engagements. His coaching competency is supplemented by certifications in the Birkman Method™, Booth 360, The ProScan and the Lominger assessments.

### Success Stories

SVP / CIO – Nationwide Health Care System Co.

President – National Health Care Financial Intelligence Co.

SVP Security & Risk Management – Global Financial Services Co.

- Coaching was focused on making the transition from CIO to a more senior leadership role beyond technology in a major healthcare organization. It required a deep dive on interpersonal as well as influential leadership and communication skills. The work required the client to move out of the details and into a strategic thinking role for the organization more holistically.
- The challenge for this leader required him to focus on the business at a higher level of client engagement and not in a tactical way. It also required him to sharpen his executive presence and not be so cavalier in how he engaged the Board as well as VIP client organizations.

*Generative wholeness is a state of being, the outcome of coaching processes and learning that catalyzes people to boldly engage, purposefully coach, respectfully partner and authentically lead.*





## Sharmin Banu, MS, PCC Generative Wholeness Practitioner

Sharmin specializes in coaching leaders and seasoned professionals develop their emotional intelligence (EQ) and leadership skills and helping them in career growth and transitions. She believes, the key to sustainable excellence is self-awareness and the ability to “search within ourselves” and align with our core values. Without this foundation, all other “how-to” training bears very little long term value. Sharmin helps people tap into their intrinsic motivation, leading to the deeper levels of engagement essential for thriving in today’s world.

### Location

Seattle, WA USA

### Industry Specialties

- Technology
- Health Care/Research
- Manufacturing

### Areas of Expertise

- Executive Presence
- Leadership Development
- Career Growth/Transition

### Client Partners

- BitTitan
- Fred Hutchinson Cancer Research United Fire Insurance
- The Boeing Company

### Experience

Sharmin has 20 years of diverse experience as an executive coach and as a technology leader. Sharmin’s clients include Executives and Senior Managers seeking leadership excellence in a corporate setting for increased collaboration and individual and team performance. Through transformative coaching approach Sharmin helps her clients to create awareness, build new habits/skills resulting in greater leadership presence and more sustainable impact to the bottom line.

### Education/Credentials

Sharmin holds a BS and MS in Computer Science. She is a proud Hokie from Virginia Tech, Blacksburg, VA.

Sharmin is an International Coach Federation, Professional Certified Coach with extensive experience in executive and career coaching. Her coaching competency is supplemented with accreditations in EQ in Action, Organization & Relationship Systems at Work (ORSC), Leadership Models Essential for Organizational Coaches and Tilt 365.

### Success Stories

- Vice President, coached for personal branding resulting in a new role and a promotion within three months, ahead of expected time, later coached to transition to the new role resulting in a smoother than anticipated hurdles in transition and a renewed commitment from the existing team.
- Engineering Manager, coached for higher team performance resulting in recognition among the leadership and peer groups, higher workplace health index, and improved work-life balance for herself.
- Technical Sales Executive, coached for next career move in 1-2 years; within 6 months successfully transitioned to a new role with a bigger scope and more alignment with his passion.

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## Jan Berg, MA, MCC Generative Wholeness Practitioner

Jan believes our unique experience of the details of our personal and professional lives influences everything else. Our patterns, unexamined, become our prisons. Jan's clients are focused on what they want, despite challenging relationships, aging parents, rebound children, demanding careers, overfilled schedules and previously untended spirituality. She brings personal experience, perspective, playfulness and hope to the process of living full-spectrum lives.

### Location

Tacoma, WA USA

### Industry Specialties

- Adult Education
- Social Services
- School Administration

### Areas of Expertise

- Executive Presence
- Leadership Development
- Organizational Health
- Culture Transformation

### Client Partners

- Thrive by Five
- Teach for America
- Peninsula School District
- Tacoma Symphony Orchestra
- Intermountain Healthcare
- T-Mobile
- Wells Fargo Advisors
- Vera Whole Health
- BayState Health
- UBS Financial
- UCB Americas

### Experience

Since 2000 Jan has coached individuals, business owners and work groups who are looking for more effectiveness, balance, motivation, contribution, satisfaction, fulfillment, personal power and joy. She is a compassionate, gentle, challenging and illuminating partner and advocate, supporting the graceful navigation of change.

Working with Jan allows you as a leader to slow down to hear yourself think. You regain access to your inner compass, refocus vision, activate passion and ignite creative possibilities for your life and your leadership. Exhaustion turns to inspired action for you and your team as you catalyze your energy towards the results you've only dared hope for.

### Education/Credentials

Jan holds a Bachelor of Arts degree in Education from the University of Puget Sound and a Masters of Arts in Psychology from Antioch University

Jan is an International Coach Federation Master Certified Coach, an inviteCHANGE Certified Mentor Coach, a Certified Facilitator of Voice Dialogue, a Certified CVI Practitioner, a Certified TILT365 Practitioner and Coach and the ICF Washington State 2012 Personal Coach of the Year.

Jan has co-authored the training curriculum for inviteCHANGE, including the advanced courses Coaching Groups and Teams in Organizations, Coaching Leaders in Organizations and Mentor Coach Certification.

### Success Stories

- Action in service to dreams and passions: launching a business, more effective team and client relating, promotion, writing a play, completing a masters degree, earning a teaching credential, doing work that is self-fulfilling and personally rewarding, regularly creating art, retiring to a sailboat.
- Development of teams of coaches who impacted senior leadership to break through a culture of inertia and complacency into vital relationships, momentum, authenticity and creativity.
- Successful transition to retirement leaving a legacy of dynamic leadership and profit.
- Freedom from the tyranny of "should", reliable connection to inner wisdom as a guide for decision-making and life design, leading to executive promotion.
- Success through transitions with aging parents, difficult children, strained relationships and relief from habits and beliefs that have previously resulted in depression, migraines and despair.

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## Lyssa Danehy deHart, MSW, LICSW, PCC Generative Wholeness Practitioner

Lyssa specializes in the development of human beings, seeking to bring their very best self forward into their families, their teams, their organizations, and communities. Our ability to expand our awareness, get curious about our reoccurring narratives, allows us to lead from a place of conscious authenticity. Lyssa's clients develop themselves at a foundational level. She uses humor and playfulness to explore their deep and often unconscious limiting stories so that they can choose the stories that they want to explore, keep, set at the curb, or rewrite.

### Location

Bainbridge Island, WA

### Industry Specialties

- Healthcare
- Technology
- Innovation/Creative Thinkers
- Public Sector

### Areas of Expertise

- Executive Presence
- Leadership Development
- Culture Transformation
- Cultural Awareness
- Relationships
- Biases
- Neuroscience & Mindfulness

### Client Partners

- Small Businesses
- Entrepreneurs
- Writers
- Directors
- Actors
- Artists
- Educators
- Doctors
- Therapists

### Experience

Since 2008 Lyssa has coached individuals, business owners, entrepreneurs and teams who are ready to get curious and expand their awareness, insights, balance, effectiveness, satisfaction in their lives and with their teams and organizations. She creates a safe place to explore biases, limiting beliefs and the internal narratives that keep us stuck or playing small in our lives.

Lyssa's clients include Entrepreneurs, Leaders, Small Business Owners, and Creative Genius' who are ready to explore the stories that keep showing up and no longer serve the mission or the direction that they want to go. Working with Lyssa supports individuals seeking balance in their life and looking to lead their groups and teams from a place of calm and mindful energy, to increase collaboration and performance.

### Education/Credentials

Lyssa holds a Bachelor of Fine Arts (BFA) from the University of New Mexico in Photography and received her Master of Social Work (MSW) in Family and Systems Theory from New Mexico State University in 1995.

Lyssa is an International Coach Federation, Professional Certified Coach with extensive experience in working in systems, with leaders and in creating healthy relationships. Coaching competency is supplemented with accreditations with the EQi 2.0, the Hogan Assessment Tool, the Seven Habits of Highly Effective People, and Tilt 365.

### Success Stories

- **Entrepreneur:** When I started coaching with Lyssa I didn't believe that I could work for myself. I wanted the autonomy of being an entrepreneur but I had a lot of fear that kept me feeling stuck. With coaching I have been able to name my goals, develop tenacity, and build a business of my own.
- **Small Business Owner:** What I needed was direction on my business goals, as well as completing a few personal goals. With coaching I was able to really clarify my goals, have support in breaking the goals down into manageable chunks, and then working towards the ones that were important to me.
- **Movie Director:** One of the biggest unexpected bonuses of coaching is how I learned a new habit of ongoing self-assessment in my work and personal life. It's been a great process and a lot of very helpful changes have taken root in my life as a result of the time we spent collaborating.

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## **Carl Franco, ABA, PCC** **Generative Wholeness Practitioner**

Carl's innovative, entrepreneurial spirit drives his passion for collaborative coaching partnerships that enliven the personal and professional narratives of those who desire to stretch themselves towards deeper levels of growth and development. Our individual and communal potential is boundless when freed from limiting beliefs and energized by a deep understanding and awareness of who we are and how we desire to show up in the world. Carl nurtures and holds space for vulnerability, creativity and clarity around what is most important to each client in their personal, relational and vocational spaces.

### **Location**

Cincinnati, OH  
Naples, FL

### **Industry Specialties**

- Non-Profit
- Financial Services
- Restaurant and Hospitality
- Human Resources

### **Areas of Expertise**

- Executive Presence
- Leadership Development
- Organizational Health
- Cultural Transformation

### **Client Partners**

- P&G Executives
- Walmart Executive
- Macy's Executive
- GE Executive
- Restaurant Group Owner
- Non-Profit Executive Directors

### **Experience**

With 26 years of experience launching and leading 3 nonprofit organizations and starting 2 small businesses, Carl brings extensive expertise in organizational development and strategic innovation. Working with leaders across the spectrum from corporate executives, nonprofit directors and small business owners, Carl facilitates coaching experiences that engage the client in the entirety of their being and in the full scope of their responsibilities.

### **Education/Credentials**

Carl holds degrees in Business Administration from the University of Cincinnati and Theology/Philosophy from Rhema College and has advanced training in organizational solutions. Carl's unique mix of education and training allows him to engage with a wide diversity of experiences and perspectives. Carl began coaching in 2010 and has since accumulated over 2500 hours of coaching with leaders, teams and individuals. Carl is an International Coach Federation Professional Certified Coach, a Certified Mentor Coach and certified Tilt 365 practitioner.

### **Success Stories**

- Restaurant Group owner coached for systems implementation and staffing reorganization significantly increased revenue and profitability and enabled a successful launch of a new restaurant concept.
- Non-Profit executive director engaged coaching for reorganization around next generation delivery of services and was empowered to successfully morph the organization to embody a new vision and corresponding services.
- Fortune 100 Corporate Executive at a director level position coached to explore the holistic impact of a vocational transition which led to new employment as a VP in another Fortune 100 corporation.
- Business owner engaged coaching to work through rebranding a business acquisition and develop new systems and processes that reflected the new ownership which was so successful that it led to the launch of a second store.

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## Sarah E. Graves, BS, PCC Generative Wholeness Practitioner

Sarah passionately and practically pursues the development of leaders through intentional, organic growth. She emboldens leaders to create an environment where management is expansive, willing to move with agility beyond comfort zones, and to champion the individual and collective genius within the organization. With teams in transition she inspires connection, realignment and forward progress within the awkward movements of the changing landscape. Her belief is that coaching is as essential an element for an organization as the product or service the company produces. "An employee who grows personally, grows professionally" and coaching seeds growth.

### Location

Portland, OR USA

### Industry Specialties

- Hospitality
- Winery Sales
- Marketing
- Fundraising

### Areas of Expertise

- Leadership Development
- Succession Planning
- Organizational Health
- Training & Presentation
- Transition Agility

### Client Partners

- Classic Wines Auction
- Oregon Wine Board
- Young's Market Company
- Willamette Valley Development Officers
- Oregon Tradeswomen, Inc.

### Experience

Sarah coached teams from opening restaurants to launching new products to expanding and implementing market teams and programs. Her experience in recruitment, training, preparation, strategy, has demonstrated consistently excellent results.

### Education/Credentials

Sarah holds an Associate of Arts degree in Psychology from Trinity Western University and a Bachelor of Science degree in Political Science from Portland State University.

Sarah is an ICF Credentialed Coach with over 500 hours. She has over 30 years of experience in the wine and food industries. She is a Certified Specialist of Wine & a Certified Specialist of Spirits.

She received Young's Market Company's 2013 "Best in the West" Inspirational Beyond Limits Award.

Sarah serves on the Board of Directors for the International Coach Federation Oregon State Chapter as the President. She is in her 10th year serving on the Procurement Committee for Classic Wines Auction, one of the nation's Top 10 wine fundraisers for children's charities.

### Success Stories

- Wine Company Vice-President of the Indie/Luxury Division coached actualizing intentional goals by manager. This development tool increased sales by double digits during a downturn in the economy. The specialty management team went on to create programs which impacted every division in the company statewide.
- A performance gap was identified in the sales department. Team Coaching for collaboration and contribution activated the community of local winery owners and restaurants. The increased sales of Oregon wines and public educational events created a new level of success and satisfaction. The team exceeded the goals and set the stage for sustainable growth and expansion in the market.
- Certification for Wine & Spirits was an initiative from the executive team. Coaching used individual and team vision and purpose, heightened with inspirational presentations by fellow team members breaking through deficit thinking to pass the test and exceed the average group pass rate by 20%.

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## Linda Hardham, MN, PCC Generative Wholeness Practitioner

Today's effective leader must navigate with agility a shifting landscape of constant change. Linda creates safety for clients to fully develop their capacities, and she supports their journeys as they generate deepened self-trust and personal and professional competence. Through exploration, clients identify core values and goals which lead them to make changes in alignment with their truest selves, a process of generative wholeness that fulfills them personally, enhances responsiveness, and enriches their contribution to the organizations they serve.

### Location

Western Columbia River  
Gorge (Underwood),  
Washington USA

### Industry Specialties

- Health Care
- Small Business Development
- Non-Profit Boards

### Areas of Expertise

- Executive Presence
- Personal and Professional Vision and Purpose
- Expanding Influence
- Leadership Development and Collaboration
- Strategic Thinking
- Business Development

### Client Partners

- Philips Healthcare
- MultiCare Health System
- Interstate Roofing
- Triad to Wellness
- Orchard View Farms
- Intermountain Healthcare
- The Wirecutter

### Experience

Linda has been coaching since 2008. Her passion for the coaching profession developed while spending more than 30 years in executive and leadership roles in a variety of healthcare settings: acute care, community health, academia, and private enterprise. Within these roles, Linda recognized that being useful in the development of others within her sphere of influence was the most fulfilling aspect of her work. She now coaches leaders and their teams as they achieve their goals of bringing their highest contribution to the workplace. As a private business owner and coach/consultant, Linda's current experience is focused on C-Suite Executives, Division leaders, and Managers within a variety of settings; sales executives; creative directors and small business leaders.

### Education/Credentials

Linda holds a Bachelor of Science degree in Nursing from Union College and a Master of Nursing degree with administrative and pulmonary clinical foci from University of California Los Angeles.

Linda is an International Coach Federation, Professional Certified Coach with extensive experience in organizational and executive leadership engagements. Coaching competency is supplemented with: CVI Practitioner Certification; Tilt 365 Practitioner and Coach Certification; Systemic Coaching and Constellations Certification.

### Success Stories

- Senior executive of integrated healthcare system coached for stepping into higher level of responsibility through enhanced focus on executive presence, communication and decision-making within a complex organizational system. "I learned to use my voice more often to achieve results... Linda was positive, supportive, warm, empathetic, thoughtful."
- Director of Pharmacy coached for effective succession planning & management of issues with staff. "Linda helped me with insight and process so that I achieved results in both career and personal growth when I was at a crossroads. She is concise and directed in her approach while being creative in your process. She brings the highest integrity and is always on time. I enjoyed working with her and benefitted from the results."
- Regional VP of sales coached for integration into new culture and building of relationships with peers and higher level senior leaders. Deemed #1 producer three quarters running; direct praise from Sr. VP for improved relationships.

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## Janet M. Harvey, MA, MCC Generative Wholeness Practitioner

Experienced with individuals at the Board of Directors, “C” Chair, Executive and Senior Management levels, Janet assists executives in adopting effective habits of perception and behavior to lead and accelerate corporate strategies. Typical engagements address executive development in the following areas: articulate and inspire through clarity of vision, enable respectful challenge, debate and catalyze synergy for strategic business choices, risk/reward critical thinking about investments and shareholder value, plan leader succession and architect sustainable cultural/strategic change.

### Location

Edmonds, WA USA

### Industry Specialties

- Healthcare
- Manufacturing
- Financial Services
- Technology

### Areas of Expertise

- Executive Presence
- Leader Development
- Culture Transformation
- Organizational Health
- Coach-Centered Workplace

### Client Partners

- American Red Cross
- Bank of America
- Bristol-Myers Squibb
- Charles Schwab
- Fireman's Fund Insurance
- Franklin Templeton
- Group Health Cooperative
- MultiCare Health Services
- Phillips Healthcare
- PopCap
- SEO Moz
- UCB Americas
- The Boeing Company
- UBS Financial

### Experience

With over 30 years of executive experience, both within a corporate setting and as an entrepreneur serving organizations, Janet specializes in times of transition. Executive leaders experience accelerated growth that requires agility and adaptability. Surrender of old habits and beliefs that are limiting in order to adopt an expanded capacity for a long-term view of the business is essential. The development of strategies and operating plans that enable sustainable use of both financial and human assets must be addressed systemically. Change, whether strategically initiated or imbedded to succession and leader development programs must facilitate organizational learning and positive impact in order to attract and retain desired talent. Janet passionately believes in liberating potential in order to maximize organizational performance and generate sustainable excellence.

### Education/Credentials

Janet holds a Bachelor of Science degree in Economics with a minor in Finance from San Francisco State University as well as a Masters of Arts degree in Organizational Development and Human Resource Management from University of San Francisco.

Janet is an International Coach Federation, Master Certified Coach with 12,000+ hours of experience primarily in organizational and executive leadership engagements. Coaching competency is supplemented with accreditations in Systemic Coaching and Constellations, Coaching Supervision, Mentor Coaching and a variety of leadership and team development assessment resources, including TILT 365, Birkman Method™, Core Values Index™ and Team Coaching International™.

### Success Stories

- Financial Services CEO coached for processes to develop executive team for transition from private equity to IPO and operation as a public company; organizational size tripled in 14 months, 95% retention of executive team, 16% organizational growth sustained for five years after the IPO.
- Manufacturing Site GM, (pharmaceutical) coached for strategic business acumen and team collaboration; architected overhaul of “go to market” strategy and global positioning implemented in less time than BOD mandate and achieved accelerated revenue targets.
- Global Sales Director (advanced medical device manufacturer), coached for relationship building, visioning and collaboration skills assigned to highly risky new product line; achieved record time approval from the FDA and exceeded sales team revenue targets 15 months ahead of schedule.
- Chief Financial Officer (loss management/disaster recovery services) targeted for CEO succession coached for expanded strategic thinking capacity, balancing risk orientation with creativity and innovation, performance through others with diverse styles; outcomes satisfied Board evaluation criteria six months in advance of anticipated promotion timing.

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## Kelly L. Holm, BA, PCC Generative Wholeness Practitioner

Kelly specializes in helping emerging and seasoned executive leaders build their capacity for greater scale and positive impact through the teams, businesses and organizations they lead. Developing a “leadership from the inside-out” philosophy over her 20-year career of increasingly senior leadership roles, Kelly is artful at helping leaders to clarify and articulate their philosophy of effective leadership, align it with strategic imperatives, and translate it into action and sustainable positive impact.

### Location

Bellevue, WA USA

### Industry Specialties

- Technology
- Consumer Goods
- Healthcare
- Manufacturing
- Professional Services
- Family Foundations

### Areas of Expertise

- Leader Development
- Leadership Team Development
- Succession Planning
- Strategic Planning
- Coach development

### Client Partners

- Fortune 18 Internet Services & Retail Co.
- Fortune 25 Software Co.
- Fortune 28th Best Co. Washington-based Retailer
- Fortune 91 Apparel Co.
- Fortune 385 Travel Co.
- #1 Global Foundation
- Amplero, Inc.
- Homecare Products, Inc.
- McKinstry
- POP Agency
- Schnitzer West
- WatchGuard Technologies

### Experience

An award-winning executive leader and leadership coach, Kelly leverages three decades of corporate experience, including hands-on senior leadership roles. Building on a successful corporate career, Kelly returned to school to earn her professional coaching credentials, and has since had the honor of coaching hundreds of executive leaders from more than 16 countries in over 30 industries, including “100 Best Companies” and the “Fortune 50.” Throughout her career Kelly was tapped as an internal coach and for leadership roles in organization-wide development initiatives. In 1999 she earned the moniker “Coach Kelly” and later became a Puget Sound Business Journal “40 under Forty” leadership honoree. In 2014, Kelly was honored with the “Coach of the Year” PRISM Award, Washington state, for her contributions to a client organization’s global high-potential development coaching program.

### Education/Credentials

Kelly holds a Bachelor of Arts degree in Communications from the University of Washington, is a Hudson Institute of Coaching Master Coach Program graduate, and Accredited Coach Supervisor through the Coaching Supervision Academy. She holds a PCC credential from the International Coach Federation (current MCC candidate), and is certified in over 15 assessment instruments, including the Hogan™ Suite, Conflict Dynamics Profile™, EQ in Action™, Behavior Styles™, MBTI Step II™, Leadership Architect™, The Extraordinary Leader™, and PROFILOR™ Leadership 360.

### Success Stories

- CEO of a national manufacturing company to scale his leadership and grow his executive team to adapt to fast-paced growth. Kelly worked with and through him to develop their company-wide leadership team, organization-wide mission, vision and core values, strategic planning cadence, and leader development programs. The company has more than tripled in revenue and recently wrote their largest profit sharing check to company-wide employees in the company’s history.
- One of four coaches selected to contribute to the launch of a Global Leader Development pilot program for a Fortune 500 company in 2008. Program expanded to 6 programs annually, company scaled to Fortune 25 status, and to-date Kelly has coached over 250 leaders worldwide from Sr. Manager to SVP level, and 11 multinational peer groups.
- CEO of an international technology start-up focused on his ability to scale as a first-time CEO and accelerate the development of his executive team to secure Series B funding, and establish an intentional, high-performing company culture and foundation to support their long-term growth.
- One of four coaches selected to launch a high-potential development program in 2012 for a global family foundation. Program has since become an International Coach Federation award-winning example of professional coaching standards, strategic initiative alignment, and sustainable impact.

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## **BJ Levy, MA, JD, PCC** **Generative Wholeness Practitioner**

BJ brings passion to both inner and outer adventure, contributing her myriad experience to enhance every encounter. With BJ, clients feel complete safety to explore and advance what is essential to come fully alive, make changes in alignment with who they truly are, and commit to creating fulfilling, meaningful lives, personal and professional. BJ uses a whole brain approach.

### **Location**

Ft. Worth, TX USA

### **Industry Specialties**

- Legal Profession
- Mediation
- Property Management
- Non-Profit
- Technology
- Psychology/Healthcare

### **Areas of Expertise**

- Personal Vision and Purpose
- Professional Vision and Purpose
- Core Essence Leadership Development
- Whole Brain Approach
- Voice Dialogue
- Core Values Index™
- Depth Coaching

### **Client Partners**

- CWD Group
- The Boeing Company
- Intermountain Health
- T-Mobile

### **Experience**

BJ has been coaching since 2000, and has facilitated coach training programs for hundreds of coaches since 2002. BJ works with leaders and managers who want to bring personal value, meaningful contribution, real connection and balance to the workplace. BJ has extensive training in and trains others to use Voice Dialogue as an avenue to understand all aspects of oneself. BJ's prior 27 year career was as a trial lawyer where she was instrumental in changing the law and the conversation about childhood sexual abuse.

### **Education/Credentials**

BJ holds BA and JD degrees from the University of Texas, Austin and an MA in Psychology from Antioch University, Seattle.

BJ is an International Coach Federation, Professional Certified Coach and Mentor Coach and Coach Assessor, with extensive experience in creative change in law, organizations, and personal development. BJ's coaching competency is supplemented with over 15 years of training, experience and teaching of Voice Dialogue, a process that brings all aspects of a person to the table.

### **Success Stories**

- CEO of 50+ property management company: I now live from my core and determine how I want to act, be, and live through clarity of communication and expectations. At work, I let go of excessive control, hired staff to support my role as the CEO, delegated responsibility, and learned to hold myself and others accountable. The result has been less stress, more time away from work, and increased clarity on my role and that of my team. Our firm is growing in ways I never thought possible made possible by the combined vision of talented people, all motivated, accountable and working to their potential.
- Manager, High Tech company: I have learned to choose a balance for myself that brings peace, joy, strength, passion, and expands my capacity. The results are everywhere around me; increased satisfaction in work, relationships, and a great sense of fulfillment in my life.
- Author, speaker, group facilitator: BJ coached me to be as strong an advocate for myself as she was for me. She held me in my most powerful iteration as I worked to understand, and then implement, what it would take for me to become my most powerful self.

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## Alyse McConnell, BA, PCC Generative Wholeness Practitioner

Alyse blends her experience as a corporate leader and entrepreneur with the interpersonal warmth and creative fire of a seasoned coach to create partnerships with her clients that ignites change and fans success. She is a lifelong student in the application of energy well placed. By combining awareness and action to create solutions and results, Alyse finds no greater joy than helping her clients tap into wellsprings of new possibility, purpose, and power.

### Location

Seattle, WA USA

### Industry Specialties

- Retail
- Tech
- Food & Beverage
- Health Care
- Consulting
- Start-ups

### Areas of Expertise

- Leadership Development
- Business Management
- Organizational Health
- Training & Presentation
- Culture Transformation

### Client Partners

- U.S. Navy
- Town & Country Markets
- Motivating the Masses
- Chateau Ste. Michelle Winery & Estates
- Lydig Construction

### Experience

Alyse coaches people from all backgrounds and works with companies of every size and scope. For nearly 20 years she has honed her ability to sharpen everyone from individuals focused on personal and professional development to mid-level managers intent on stepping up their game to top leaders implementing strategic shifts. She values working with anyone who expects high standards for performance and results. She also knows firsthand how people, teams, and organizations work and recognizes the stumbling blocks that often stand in the way of top performance and rob joy from our daily lives. Her passion is in uncovering the ways to overcome these obstacles.

### Education/Credentials

Alyse earned a Bachelor of Arts degree in Communication from Wright State University in Dayton, OH. She is a Professional Certified Coach credentialed by the International Coach Federation and a graduate of the San Diego, CA-based Accomplishment Coaching school where she went on to become an instructor and program leader. Alyse is also credentialed as a facilitator and instructor in a variety of training and assessment programs.

### Success Stories

- The Director of Operations was preparing to step into her new role as CEO and had reputation for being ‘difficult.’ She wanted coaching to navigate the transition as well as create a groundswell of support by shifting the perception of her. Alyse supported her vision for cultural transformation with specific focus on building trust and leading in the face of change. Shift to CEO achieved nine months earlier than anticipated and welcomed as the obvious step for organizational growth.
- A group of Regional Sales VPs wanted coaching for team development with an intention of increased sales. Utilizing feedback from individual 360-degree assessments, Alyse coached the leaders to identify training gaps and increase team performance. In that year, sales shifted from the single digits to an 18% jump. In addition, 20% more team members earned recommendations for promotion.
- A mid-sized company wanted to deepen the management bench in preparation for expansion. Alyse designed and provided concurrent leadership development and coaching programs to enable change. As leaders improved — supporting their teams better and providing more accountability — sales went up, even while the rest of the industry announced store closures and reported sales declines.

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## Sara Spencer, MBA, PCC Generative Wholeness Practitioner

Sara partners with clients to maximize leadership impact and personal satisfaction with ease. She insightfully helps her clients to live in alignment with their core values to support their desired strategic and organizational vision, while calling forth authenticity and leadership presence. Her guiding philosophy is that effective coaching is grounded by an inside-out approach, which deepens individual awareness to create sustainable change, as well as naturally strengthening leadership capability, team effectiveness and expectations of how intact and cross-functional teams interact with each other. She works with creative individual contributors, teams, leaders, and entrepreneurs who are dedicated to personal achievement and being a positive ripple in the pond of life.

### Location

Seattle, WA USA  
Kaua'i, HI USA

### Industry Specialties

- Aerospace
- Engineering
- Manufacturing Operations
- Executive Leadership
- Health Care
- E-Commerce
- Sales/Online Marketing

### Areas of Expertise

- Leadership Development and Succession Planning
- Leadership Presence
- Vision/Mission/Legacy
- Life/Career Transition
- Whole Life Balance
- Energy Management
- Entrepreneurial Expression
- Business Development and Start-Up Funding
- Project Management

### Client Partners

- The Boeing Company
- Seattle University
- Foundation for Healthy Generations
- Steven's Pass Ski School

### Experience

Sara facilitates individuals, partnerships and teams in achieving long-term excellence, increased self-capacity and success through authentic living. Sara is an entrepreneur and leader with over twenty years of service in a wide range of professional arenas, including aerospace, engineering and manufacturing, e-commerce, business development and planning, and building a direct sales team of over 2,000 people. Clients working with Sara should expect impactful growth and sustained change.

### Education/Credentials

Sara holds a BS in International Business from the University of California and lived in Mexico and Brazil. Received her International MBA in Entrepreneurship and Leadership from Seattle University. She is an International Coach Federation Professional Certified Coach with 1,500+ hours of leadership coaching experience, a Certified Mentor Coach and Course Leader with inviteCHANGE®. She holds supplementary certifications in DiSC Assessments®, the Birkman Assessment®, Inside Out Coaching®, and other modalities that support balanced living and leadership impact.

### Success Stories

- Executive Manufacturing/Operations Director, in six-months restructured his team to include an Executive Leadership Coaching Program. The program intention allowed for greater leadership capability, presence and awareness, improved communication, sustained behavioral changes, and clarity in strategic vision and direction.
- Engineering Leader: "Sara's coaching broke down barriers to help me achieve what I want in life. Each session focused on a different aspect of my life. Her coaching allowed me to realize goals and fulfilled my desire for personal and professional growth."
- Director of Ski School: "Sara invited me on a discovery process to promote living in alignment with my values, and to embrace my personal leadership vision and goals. She used experiential techniques, such as emotional intelligence and neuroscience tools, to unlock positive change within my training organization and myself. Her approach elevated my awareness of conscious choice, strengthened my leadership competencies, personal accountability, and transparency within my teams."
- SPEEA Engineer: "My perspective of my career has changed completely from a passive role, waiting for my accomplishments to be recognized and get promoted, to an active role asking for promotion, seeking out the skill sets needed to advance my career, changing my thought patterns, and routine. My career trajectory has climbed considerably. I have been promoted and received a meritorious invention award."

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## Jennifer Starr, BA, MCC Generative Wholeness Practitioner

Jennifer offers her clients her gift of intuitive and creative insight to expand perspective and create new possibilities, inspiring the full expression of their unique genius and highest contribution. She assists in bridging the gaps between known professional success and the often-unknown personal fulfillment. She works with individuals and leaders who are dedicated to evolving their best selves and making a significant and positive impact in the world.

### Location

Bend, OR USA

### Industry Specialties

- Life Sciences
- Expressive Arts
- Healthcare
- Professional Development
- Leadership
- Sales/Marketing
- World Travel
- Communications

### Areas of Expertise

- Authentic Presence
- Vision/Mission/Legacy
- Life/Career Transition
- Whole Life Balance
- Creative Expression
- Leadership Development
- Motivation/Engagement
- Entrepreneurial Pathways
- Spiritual Development
- Project Management

### Client Partners

- The Boeing Company
- Ray of Hope Foundation
- Healthgrades®
- Intermountain Healthcare
- T-Mobile
- Wells Fargo Advisors

### Experience

As a Master Certified Coach, Jennifer facilitates individuals, partnerships and teams in achieving inner and outer success through authentic leadership. Her passion is to inspire and encourage life/work congruence and personal sovereignty, i.e. taking a stand for who we are at our personal best. She coaches those who are already effective at making things happen and achieving results, and yet are acutely aware that there is something more.

Jennifer is an entrepreneur and leader with over thirty years of service in a wide range of professional arenas, including world travel and direct sales/marketing. She has started up companies, both brick/mortar and virtual, and has successfully led teams and organizations.

### Education/Credentials

Jennifer holds a BA in Art and Psychology from University of Oregon. She is an International Coach Federation Master Certified Coach with 4500+ hours of experience, a Certified Coach Mentor and Course Leader with inviteCHANGE®. She holds supplementary certifications in Core Values Index®, Expressive Arts Therapy®, Psych-K® (Psychological Kinesiology), SoulCollage®, Voice Dialogue, and other modalities that support holistic living and leadership.

### Success Stories

- Staff physician at a VA Hospital and Executive Director of an international non-profit, restructured her position to allow for more life balance and to launch another dream. In clarifying her vision and aligning with her values, she is in the beginning phases of starting up an alternative, creative solution-based, holistic health and wellness center.
- Physician Leader: "Right on my two year schedule, I retired from the operating room, began as a medical co-director for Hospice, and was granted privileges for palliative medicine at Wilcox Hospital. In the years I've worked with Jennifer, I've made two major career evolutions, two major relationship changes, and two enormous geographic changes. I'm living the best life I've ever had- it's all different, it all works, and is a manifestation of ideas I began to articulate with Jennifer years ago.
- University IT Manager sought more personal fulfillment and motivation. Our work included visioning, planning & implementation, resulting in freedom from debt, improved relationships, creating a flexible, virtual position within his organization, building a stronger team, becoming a certified wellness coach, and traveling and living in places that he'd always dreamed of.
- Freelance writer: "There has been a tectonic-caliber shift in my life since I began working with Jennifer. She helped me see new approaches and inroads for myself in the world. With her help, I've felt my self-imposed pressure and expectations dissipate, experiencing confidence that always existed, but was in the shadow of emotions that had hindered me.

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## Steve Thorson, MBA, PCC Generative Wholeness Practitioner

Steve specializes in development of Leaders, seeking leadership excellence for themselves and organizational health for the organizations they lead. Creating a collaborative environment where individual voices are heard, innovation occurs and accountability exists through a coaching approach to leading. Steve stands in his belief, faith and trust in the outcomes of a coach approach to leading because he knows it works. His invitation to others is to experience and experiment with the approach.

### Location

Portland, OR USA

### Industry Specialties

- Financial Services
- Healthcare
- Manufacturing
- Technology

### Areas of Expertise

- Executive Presence
- Leadership Development
- Organizational Health
- Culture Transformation

### Client Partners

- Boca Raton Regional Hospital
- Winona National Bank
- United Fire Insurance
- Phillips Healthcare
- The Boeing Company
- Interstate Roofing
- ZF North America

### Experience

As a Certified Professional Coach with over 25 years of Operations Management experience, Steve's clients include Executives and Senior Managers seeking leadership excellence in a corporate setting, business owners seeking balance in their life and leaders of groups and teams looking for increased collaboration and performance. A transformative approach to coaching results in clients, both individual and group, discovering an inner self and choosing agility, self-responsibility and contribution.

### Education/Credentials

Steve holds a Bachelor of Science degree in Manufacturing Technology from Central Washington University and a Master of Business Administration degree in Engineering and Technology Management from City University, Seattle.

Steve is an International Coach Federation, Professional Certified Coach with extensive experience in organizational and executive leadership engagements. Coaching competency is supplemented with accreditations in Human Synergistics Organizational Culture Inventory®/Organizational Effectiveness Inventory™, Taylor Protocols Core Values Index™ and Tilt 365.

### Success Stories

- Manufacturing Site Program Vice President, coached for team collaboration and innovation at the team level resulting in 40% increase of implemented process improvements in a one year timeframe.
- Director of Manufacturing, coached for visioning and leading through significant change related to increasing production to an unprecedented level; production increase achieved with lower than expected disruption and returned to on schedule delivery 3 months sooner than expected.
- Divisional Sales Director, coached for relationship building, visioning and collaboration skills to prepare for promotion in 1-2 years; promotion achieved 6 months ahead of expected time.

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## Sheeba Varghese, PCC Generative Wholeness Practitioner

Sheeba is a catalyst for change. Her passion is reflected in providing leadership development to men and women who desire to bridge the gap from simply managing day-to-day to becoming exceptional leaders who architect change, innovation and sustainable excellence. She meets clients where they are, finding ways to customize engagements to best serve the presenting needs of each leader. Her approach is grounded in deep listening, intuitive challenging, and the ability to see to the heart of an issue. Sheeba is a firm believer that “although our lives are a series of defining moments, it is not the moment that defines us, but how we choose to live in them.”

### Location

San Francisco Bay Area,  
CA USA

### Industry Specialties

- Financial Services
- Non-profits
- Sales
- Education

### Areas of Expertise

- Leadership Development
- New and Emerging Leaders
- Minority and Female Leaders

### Client Partners

- Make A Wish Foundation
- Coach Initiative
- Discovery Communications
- Fidelity National
- Sino Trans International
- Mama Bootcamp, Inc.
- Search for Common Ground
- Vital Voices Grow Fellowship
- CohnReznick LLP

### Experience

She brings more than 20 years of experience working with individuals to her coaching, including a background of more than seven years as a certified K-12 teacher. Sheeba's clients include Emerging Leaders, Managers, Senior Directors, Vice Presidents and Partners seeking leadership excellence within their role. She supports her clients to cultivate a mindset that would maximize their impact which then has translated into laser focused priorities, increased productivity, collaborative teams, and thus an achievement of their goals. She has worked with clients across a broad range of industries including education, non-profits, solo-preneurs, financial services and the creative arts.

### Education/Credentials

Sheeba holds a dual Bachelor of Science degree in Mathematics and Secondary Education from the University of Maryland, College Park, MD. She has partnered with the Life Purpose Institute to develop and create their Advanced Coach Training program along with the online learning portion of it. She provides Mentor Coaching with the International Coach Federation. She received her Coaching certification through the Institute for Professional Excellence in Coaching, Sherpa Executive Coaching and the Life Purpose Institute and has over 1000 hours of coaching experience. Additionally, she completed her Mentor Coach Certification with inviteCHANGE.

### Success Stories

- Partner, activated collaboration and development within the team and expansion in the new role. This created higher levels of confidence among the partners, better communication strategies with the team and outside clients, while decreasing stress levels.
- VP of Sales, coached through conflict with low performing team members resulting in camaraderie, renewed motivation and an increase in engagement and productivity.
- Senior Audit Manager, coached for work-life balance, communication, relationship building, and visioning leading to a mindset shift from managing day-to-day to leading. Recently promoted to Partnership within the firm.
- Coached amplification of focus and prioritization the outgrowth of which was a 75% increase in the number of loans prepared in a competitive real estate market.

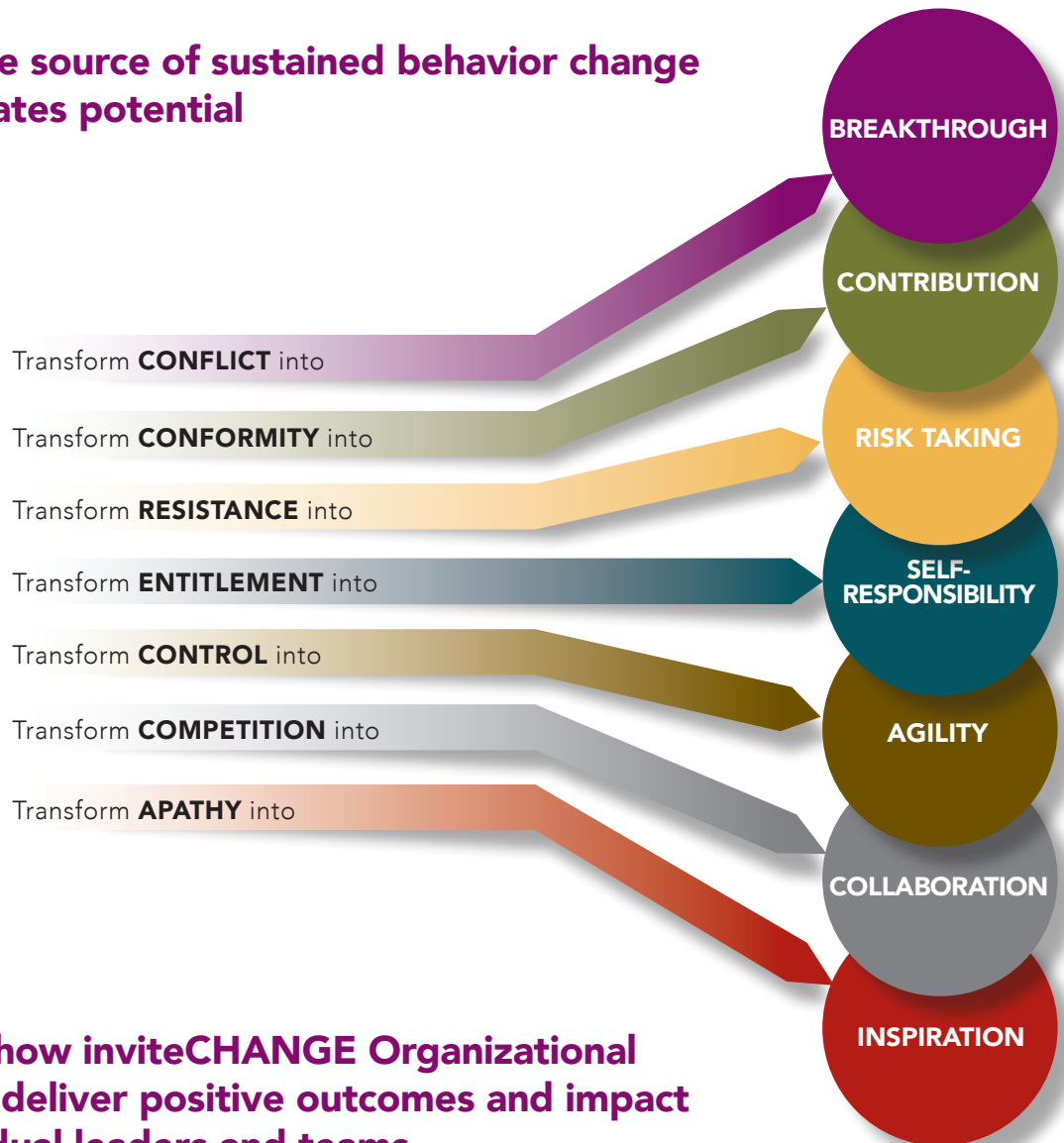
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# ARE THE ROOTS OF YOUR CULTURE GENERATING SUSTAINABLE EXCELLENCE?

Unlock the source of sustained behavior change that liberates potential



Discover how inviteCHANGE Organizational Solutions deliver positive outcomes and impact for individual leaders and teams





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