



THE *executive* ADVISORY

Coaching Services

Process and Options



OUR APPROACH TO COACHING

OVERVIEW: One of the key components for an individual's success is a high level of self-awareness and a strategic plan to create alignment between their own goals and passion and that of the business they have chosen to work in.

PROCESS: Our coaches use assessments, interviews, and question-based dialogue to help uncover what roadblocks exist and which skills or resources are a priority for the individual's success.

We help individuals manage the impressions that their behavior creates and provides more insight into one's credibility through candid feedback from colleagues.

Our coaching follows a simple five-step process that includes assessment, feedback, coaching dialogue, internal / external reinforcement, and follow up on results.

We focus on providing tailored solutions which align with the unique style of the individual and the needs of the business.

PLATFORM: We can conduct training via phone, virtually or in-person based on the preference of the participant, safety requirements and location.



PHASES OF THE COACHING PROCESS

FOUNDATION PHASE

INTRO COACHING – Coach meets separately with coaching participant to discuss their unique challenges and goals for the coaching engagement. Topics such as confidentiality, process flow and approach will be discussed. Individuals will have a chance to share their experience up to this point and get clear on their goals for the coaching engagement.

ASSESSMENT – The approach to assessment will depend on the length and goal of the coaching engagement. When possible, we will conduct an interview style 360 assessment. This will enable greater understanding of the nuances to the individual's environment, impact and reputation. However, assessment may be done using previously gathered feedback, an online 360 or self-assessments to align with the needs of the individual and organization. This will be discussed and agreed upon in advance. Based on the results, the coach will build a development plan with the coaching participant.

SPONSOR CHECK-IN

The coach will share and discuss any environmental or organizational themes they see influencing the dynamics between the individual being coached and those they interact with. They will also share the development plan. No confidential information will be shared. The focus is on ensuring the coaching tools and approach so that it can be supported during and beyond the coaching engagement.

SKILL BUILDING

SKILL BUILDING SESSION(S) – Coach meets 1-1 with the coaching participant to review best practices and apply to current conflict challenges. These sessions are used to prepare the individual to engage more effectively in the areas of opportunity identified during the assessment. This can be focused on building self-awareness, as well as evolving skill sets.

SPONSOR & PARTICIPANTS CHECK-IN

The coach, coaching participant and internal sponsor will meet to gauge progress and share themes on lessons learned. The goal is to reinforce how communication and support should look once the coaching engagement is over.

COACHING CLOSE

SKILL BUILDING & ACTION PLANNING – Coach meets 1-1 with the coaching participant to discuss how the engagement has impacted their abilities and credibility on the job. Focus will be on how progress made and how to support continued evolving towards goals beyond the coaching engagement. Another assessment can be conducted to help measure impact and progress

FINAL SPONSOR & PARTICIPANT CHECK-IN SESSION – Coach will facilitate a final session to discuss what's been working and what will need more commitment and development. The focus will be on lessons learned, new focus points or goals and how to ensure support and continued development.

COACHING PRICING OPTION COMPARISON CHART

STRATEGIES & TECHNIQUES	COACHING OPTION			
	Full Coaching Engagement	Short-Term Coaching Engagement	Initiating Coaching Engagement w/360	Initiating Coaching Engagement w/o 360
Duration	6 Months	3-4 Months	2 Months	2 Months
360-Feedback	X	X	X	
Feedback Debrief	X	X	X	
One-on-one Coaching Meeting	Weekly to Bi-Weekly	Weekly to Bi-Weekly	Five Meetings	Five Meetings
Stakeholder Updates	X	X	X	X
Weekly Follow-up	X	X		
Communication Style Assessment (e.g., DISC, MBTI, EQ, Values, etc.)	X			
Ongoing Support	X			
Follow-up 360 Assessment (optional)	X			
Comparative Analysis & Report (optional)	X			

ADDITIONAL COACHING OPTIONS

- ❑ *Executive Presence & Presentation - Targeted Coaching*
- ❑ *Individual Contributor Targeted Development*
- ❑ *Partnered / Mediation Coaching*

EXECUTIVE PRESENCE & PRESENTATION (TARGETED COACHING)



We help individuals develop their skills in presentation development, slide design, public speaking and storytelling, as well as how to build their credibility and executive leadership presence on the job.

Key topics we cover include:

EXECUTIVE PRESENCE

- ☐ Generate awareness around impression management and the impact their executive presence has on others
- ☐ Create clear, compelling business arguments using the most critical business success factors
- ☐ Communicate clear, concise, direct messages on the spot that look and sound credible
- ☐ Think quickly and respond to questions clearly, directly, and in a composed manner, even in the face of confrontation

PRESENTATION SKILLS

- ☐ Design presentations with the audience in mind
- ☐ Use storytelling combined with business case building
- ☐ Present with an authentic, conversational style that builds a connection with the audience
- ☐ Design presentations that get across valuable ideas, ensuring others leave the conversation having gained something
- ☐ Build upon the individual's natural strengths and talents
- ☐ Identify blind-spot habits that may distract from the individual's message
- ☐ Create a formatted approach, structured to make it easy to replicate and bring own personal style through every time

Methodologies we use include, but are not exclusive to:

- ✓ On-site and / or online coaching
- ✓ Video-taped sessions with recorded feedback for reference
- ✓ Reviewing of content and slides for specific talks or meetings
- ✓ Role-playing and practice runs to ensure confidence and focus

Duration: Three meetings (1-hour sessions)

INDIVIDUAL CONTRIBUTOR (TARGETED COACHING)



Another option available is our Individual Contributor Targeted Development. This is a good option when needing to upskill a critical employee that may require some focused skill development. This is usually about training someone to level up in areas such as influencing, adapting style or navigating difficult situations.

COACHING ENGAGEMENT PROCESS	TIMING
Step 1 – Pre-coaching Alignment Meeting Meet/speak with L&D, senior management, HR to assess and determine coaching intervention. Meet with coachee to set the stage and foundation for coaching themes.	3 months (6 meetings)
Step 2 – Debrief & Coaching (One-on-One Meetings) Conduct bi-weekly meetings for three months providing tools, techniques, and strategies necessary to address developmental areas. (Specific areas of focus can include professional demeanor under pressure, executive presence, providing productive feedback to peers, and introducing effective managerial skills).	
Step 3 – Reinforcement (Emails & Calls) Follow-up one to two times per week with the coachee. Provide “homework” assignments encouraging practice of the tools and strategies discussed. Send additional links, books, and resources. Check in with Senior Management.	
Step 4 – Internal Encouragement & Updates Ongoing follow-up with senior management and L&D and/or HR to gauge progress being made.	

PARTNERED / MEDIATION COACHING



Partner Coaching is a **hybrid of individual and group coaching**. As a conflict resolution mechanism, it assists people with building individual skills for better communication, as well as a focus on a particular partnership that currently suffers from conflict challenges and lack of trust. This process helps people to learn more about themselves and how they deal with conflict, while also supporting both individuals to shift they way they engage with one another to enable them to elevate the dynamic of how they work together. The goal is to **elevate their individual skills**, as well as create a **healthier working relationships** that leads to a more collaborative approach to working together.



PHASE 1

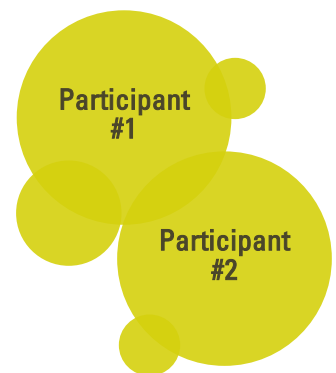
ASSESSMENT INTERVIEWS

Assessment interviews are conducted by the coach with key stakeholders, such as leadership and HR, to gain insight into the context of the conflict, as well as identifying the level of complexity, accountability, and confidentiality involved.

The coach will also meet individually with the participants who will be in the coaching process. This will be an opportunity to build trust, learn each person's perspectives, review the coaching process, and determine each party's willingness and commitment to engaging in the coaching process.

In the beginning of the coaching process, the focus will be on building individual self-awareness and identifying conflict navigation skill gaps. The coach will work with each party on a one-on-one basis to build the proper foundation to create a safe and respectful space for both parties to communicate with one another.

As soon as deemed appropriate, the coach will begin holding facilitated conversations with the two parties to help the two practice their skills in a managed environment, as well as give the coach further insight into what triggers are involved between the two parties.



PHASE 2

ONE-ON-ONE SKILL BUILDING

PHASE 3

FACILITATED COACHING & DIALOGUE

As the coaching process unfolds, the majority of coaching time will shift towards facilitated conversations. The coach will continue to play a facilitator's role but will move towards observation and feedback vs. driving the direction and managing issues. As the two participants take on more ownership and demonstrate stronger conflict navigation capabilities, the coach will move further out of the dialogue.

LENGTH: FOUR MONTHS

COACH BIOS

- ❑ *Gerri Brehm*
- ❑ *Heather MacArthur*
- ❑ *Joe Jotkowitz*

GERRI BREHM



OVERVIEW

My career has spanned 20+ years working as a Human Resources professional, facilitator and coach. My focus as a coach is to help individuals avoid getting in their own way. The biggest take away I find with every engagement I participate in is how critical it is for leaders and employees to have the support needed to reach their goals.

This comes in many forms and can range from getting insight into how others perceive them at their best or under stress, how to not over-rely on one strength and build new “behavioral muscle,” how to leverage the support and resources available to them, or the skills for working through the complex challenges of today’s workplace.

INDUSTRY SPECIALTIES

- Entertainment
- Music
- Video Gaming
- Technology
- Bio Technology
- Telecommunication
- Hospitality
- Management Consulting
- Human Resources
- Finance
- Non-Profit
- Manufacturing

AREAS OF EXPERTISE

- Coaching
- Communication
- Change Management
- Executive Presence
- Leadership Development
- Management Skills
- Meeting Management
- Presentation Skills
- Team Development

EXPERIENCE

During my tenure with Universal Studios, I had the opportunity to work on company-wide initiatives like; rolling out an in-house designed and developed performance management process, designing training and development programs and delivering diverse curriculum across the organization. Branching out on my own in 2001 I was able to continue my work as an external consultant in the entertainment industry, as well as build a clientele across the music, talent management, high-tech and video gaming industries delivering core development curriculum as well as customized programs on basic management skills, time management, coaching, giving feedback, interviewing, change management, and compliance training.

EDUCATION / CREDENTIALS

- Master of Arts, Marriage, Family & Child Counseling, Phillips Graduate Institute (Formally CFSC)
- Bachelor of Arts, Theatre Arts, California State University at Long Beach
- Certifications in various leadership, executive coaching and assessment tools.

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HEATHER MACARTHUR



OVERVIEW

My passion is finding ways to combine individual contributions, team dynamics, and organizational purpose to deliver meaningful results. My focus as a coach is to help individuals get clear on what their goals are and ensure they are aligned and supported by the company they chose to work for.

When partnering with someone on their coaching engagement, there are three main areas to assess that include the individual's skill set, motivation, and environment. We work together to fortify all three areas to help them achieve their goals.

INDUSTRY SPECIALTIES

- Entertainment
- Gaming
- Military / Government
- Automotive / Factory
- Technology
- Human Resources
- Education
- Hospitality
- Retail
- Manufacturing
- Non-Profit
- Publishing
- Finance
- Legal

AREAS OF EXPERTISE

- Business Strategy
- Executive Presence
- Leadership Development
- Performance Management
- Change Management
- Learning and Development Programs
- Team Development
- Coaching
- Influencing Decisions
- Conflict / Mediation

EXPERIENCE

My experience comes from a combination of internal leadership roles and external consulting partnerships within government agencies, start-up companies, and several Fortune 500 companies.

The primary areas I've supported include business strategy and change, organizational design and development, coaching, and leader program design and implementation. I've had the pleasure and honor to work with people at all leadership levels, dealing with varying points of tenure and experience.

EDUCATION / CREDENTIALS

- Author, "Your Career on Purpose: Stop Begging for a Promotion, Start Selling Your Genius"
- Forbes Contributor
- MA, Mas Communications, CSNU
- BA, Psych / Criminal Justice, UMUC, MD
- Certifications in various leadership development, executive coaching and assessment tools (DISC, Hogan, ESCI, Birkman, Linkage, etc.)

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JOE JOTKOWITZ



OVERVIEW

I've studied and made a living being a communication specialist for one main reason; I believe communication is what connects and disconnects people. Whether it's how an executive builds his presence across an organization, how a leader works with her staff, or how an individual conveys his credibility to clients, the ability to communicate the intended message is critical for a productive and innovative workplace.

EXPERIENCE

Throughout my 30+ year career, I've supported organizations by providing executive coaching, professional training and development, organizational development, facilitation, assessment, and curriculum design. Most often, I get brought in to work with executives, leaders, teams, and various professionals on areas of leadership acumen, management skill, relationship development, team interaction, and communication effectiveness. My passion and drive for helping people communicate and interact with credibility and intent has led me into a vast array of medium to large sized organizations from startup to established Fortune 500 institutions.

EDUCATION / CREDENTIALS

- MA, Communication, Ball State University, IN
- BS, Communication Studies, Bradley University, IL
- Certifications in various leadership development, executive coaching, and assessment tools
- Acknowledged by the San Fernando Valley Business Journal, Los Angeles Business Journal, and International Communication Association for accomplishments in the field of Business Communication and Communication Consulting
- Professional Organization Affiliations – American Society for Training and Development, National Speakers Association, Organizational Development in Los Angeles, and Entertainment Human Resources Network

INDUSTRY SPECIALTIES

- Entertainment
- Gaming
- Aerospace
- Management Consulting
- Technology
- Healthcare
- Hospitality
- Retail
- Manufacturing
- Mining
- Oil & Gas
- Automotive
- Publishing
- Telecommunication
- Accounting
- Legal

AREAS OF EXPERTISE

- Communication
- Executive Presence
- Leadership Development
- Management Skills
- Change Management
- Presentation
- Team Development
- Coaching
- Meeting Management

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