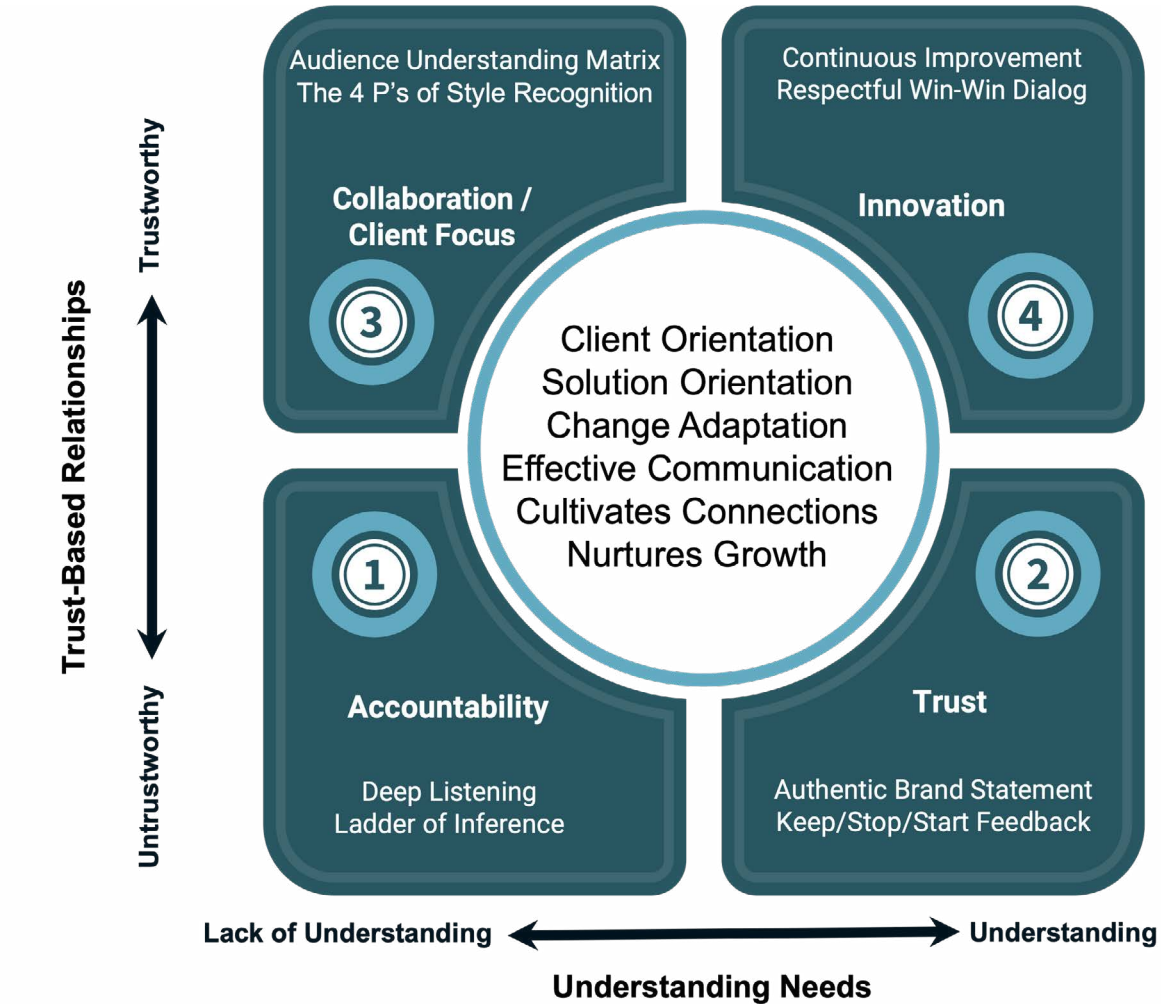
Coaching Culture Workshop

Creating a Coaching Culture Program



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Coaching Workshop

Creating a Coaching Culture Program

PROGRAM INTRODUCTION

EXECUTIVE SUMMARY

PROGRAM AGENDA

COACHING CULTURE CONTEXT AND FRAMEWORK

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PROGRAM EXECUTIVE SUMMARY
CREATING A COACHING CULTURE PROGRAM

WHAT?

- To learn coaching tools that you will immediately apply as HR Practitioners

WHY?

- To develop coaching skills that are needed to demonstrate CIBC's values and create a culture of care

WANT?

- Have fun and make a commitment to applying these tools when you're back at work!

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PROGRAM AGENDAS

COACHING WORKSHOP

- Date: September 15, 17, and 19, 2025
- Time: 1:00PM to 4:00PM EST

AGENDA: DAY 1

1:00 PM AST	Opening Coaching Culture Context and Framework Quadrant 1 – Accountability • Deep Listening Tool Break Ladder of Inference Tool
4:00 PM AST	Close

AGENDA: DAY 2

1:00 PM AST	Day Kickoff Quadrant 2 – Trust • Authentic Brand • Keep/Stop/Start Feedback Break Quadrant 3 – Collaboration/Client Focus • Audience Understanding Matrix
4:00 PM AST	Close

AGENDA: DAY 3

1:00 PM AST	Day Kickoff Recap/Review Quadrant 3 - Collaboration / Client Focus • The 4 P's of Style Recognition Break Quadrant 4 – Innovation • Continuous Improvement • Respectful Win-Win Dialog Whole Group Debrief & Action Planning
4:00 PM AST	Program Close Post Program: 1-Hour Coaching Session

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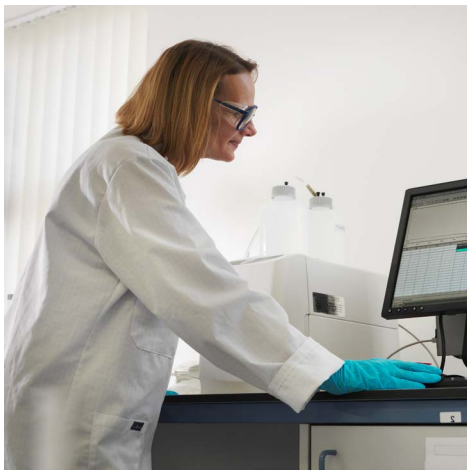
MENTORING, MANAGEMENT, & COACHING

	### MENTORING Teaching by utilizing the platform of your life experience and success to help others advance.
	### MANAGEMENT The act or skill of controlling or making decisions.
	### COACHING Facilitator of learning who helps individuals solve their own problems, unlock their own potential, and improve performance.

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A COACHING MOMENT

Where an employee can learn and develop through the coaching process

- Managing emotions
- Taking accountability
- Managing change
- Being a team player
- Making an important decision
- Empathy
- Presentation skills
- Unmet expectations

Are you open to some coaching?
Is now a good time? or when would be?

COACHING FOUNDATIONS



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REFLECTION: SPOTTING COACHING MOMENT

“Think of a recent conversation where you felt an urge to offer guidance.

What was it about that moment that signaled it might be a coaching opportunity?”

REFLECTION: WRITE YOUR ANSWER

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COACHING CADENCE

1ST SESSION: To understand and give assignments

2ND SESSION: To check in and follow up on assignments

3RD SESSION: Check-in session and close out

COACHING LOG FORM

Coachee: Date/Time:	Coach: Location:
Key Topic(s) to be Covered:	
Pre-Session Reflections/Focal Points/Concerns/Challenges/ Probes:	
Results of Next Steps *(from previous coaching session)*:	
Notes from this Session:	
Agreed Next Steps *(specific action(s), timing(s), measure(s),etc.):*	
Next Session	Date/Time Location:

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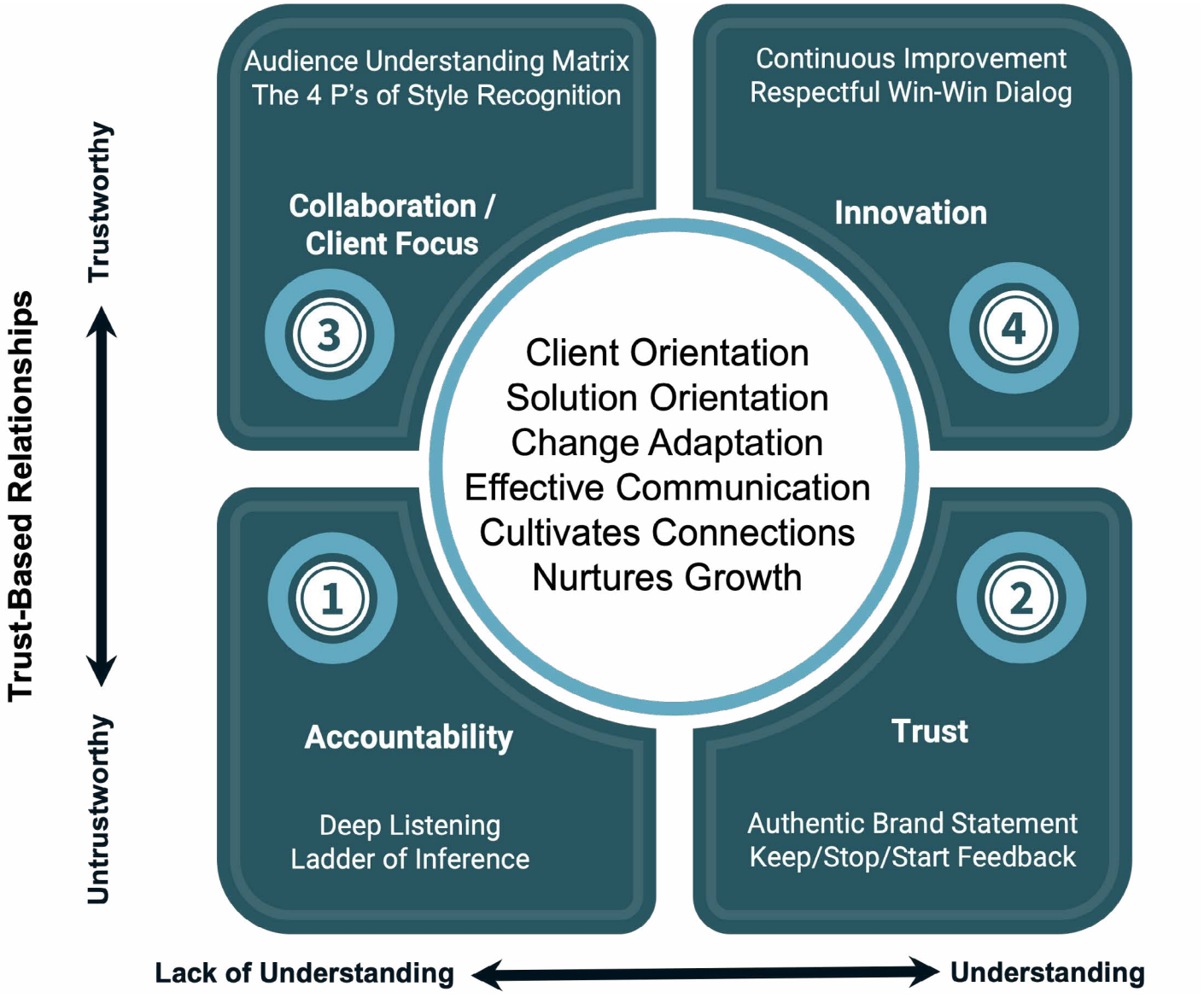
CIBC COACHING SKILLS FRAMEWORK

The Voice of Our Organization



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Creating a Coaching Culture Program

QUADRANT 1 - ACCOUNTABILITY

DEEP LISTENING TOOL

LADDER OF INFERENCE

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LACK OF UNDERSTANDING/UNTRUSTWORTHY





Identifying **Lack of Trust** with Coachee language:

- This person just doesn't seem to fit in.
- They are in it for themselves.
- It is frustrating to work with them. I don't trust their intentions.

Identifying **Lack of Understanding** with Coachee language:

- This makes no sense to me.
- I don't understand why this is a problem.
- They don't understand how this fits in with our vision and goals.
- I don't know where they got their facts and data.



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WHY DEEP LISTENING?

- Better understand the current state
- Feel deeply heard
- Identify the root cause

DEEP LISTENING TOOL



THINKING

Listens for what the coachee may be “Thinking” about their situation.



WILLING/NOT WILLING

Listens for what the coachee may be “Willing” or “Not Willing”to do regarding their situation.



FEELING

Listens for what the coachee may be “Feeling” about their situation.



STEPS

Step 1: Coach focuses and takes notes. May ask inquiry questions

Step 2: Coach shares their insights and coachee takes notes and shares their key takeaways

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DEEP LISTENING EXAMPLES

COACHEE SAYS...

"The best way to handle the rapid deployment of a new marketing campaign program is to empower the business to make real-time decisions on the forthcoming collateral, but since some leaders prefer outdated mediums, we should just start incorporating new mediums and hope things align. We'll probably manage to thrill and satisfy as many business partners with this approach anyway."

Thinking…

- The task is too difficult and not worth the effort anyway
- Another "less-than-ideal" approach is almost as good.

COACHEE SAYS...

"The best way to handle the rapid deployment of a new marketing campaign program is to empower the business to make real-time decisions on the forthcoming collateral, but since some leaders prefer outdated mediums, we should just start incorporating new mediums and hope things align. We'll probably manage to thrill and satisfy as many business partners with this approach anyway."

Feeling…

- Frustration and hopelessness regarding a perceived lack of control/influence with respect to the supply chain organization
- Lack of confidence regarding ability to affect significant change

COACHEE SAYS...

"The best way to handle the rapid deployment of a new marketing campaign program is to empower the business to make real-time decisions on the forthcoming collateral, but since some leaders prefer outdated mediums, we should just start incorporating new mediums and hope things align. We'll probably manage to thrill and satisfy as many business partners with this approach anyway."

Willing/Unwilling…

- Unwillingness to take on a task that promises to be difficult or challenging

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INQUIRY MATRIX TOOL

(1) Objective Questions	(2) Reflective Questions
■ *What happened?* ■ *What did you do?* ■ *Tell us more about that?* ■ *Who were the key people involved?* ■ *What else was happening?* ■ *How can I best help you today?*	■ *What does the challenge mean to you.?* ■ *It sounds like what you' re saying is . .?* ■ *What did you hope to achieve?* ■ *Would it make any difference if it were a different time, person, place?* ■ *How would you like to respond?* ■ *What could you do differently?*
(3) Interpretive Questions	**(4) Decisional Questions**
■ *What have you learned so far?* ■ *What do you think is going on?* ■ *What were the implications?* ■ *What prompted you to . . .?* ■ *It sounds as if you are feeling . . . .* ■ *How do you react to that?* ■ *What might happen if you . . .?* ■ *How would you know if . . .?*	■ *What will you do next?* ■ *What' s stopping you from . . .?* ■ *How can you . . .?* ■ *Do you think that . . .?* ■ *What can you do to make the problem different?* ■ *Would . . . be of any use??* ■ *How would you like to respond?*

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REAL PLAY ACTIVITY INSTRUCTION (DEEP LISTENING)

10 Minutes

- In breakout rooms of 3, choose a situation that is really troubling to you, and you are not sure what the best action is (keep it anonymous).
- Roles:
  - Coachee: The owner of the situation (speaking)
  - Coach: Listening and guiding the coachee through the tool (listening)
  - Observer: take notes and act as an observer and offer commentary/insight on using the tool
- If you have 4 people in your breakout room, assign 2 people to observer role.
- Decide whether to use the real play scenario provided or another applicable situation.
- For the next 10 minutes the coachee speaks about the situation and the coach listens and takes notes on what the coachee is thinking, feeling, willing and not willing to do.
- Coach can ask inquiry questions if helpful.
- Coach shares what they heard the coachee is: Thinking, Feeling, Willing/not willing to do about their situation
- Coachee takes notes, shares insights, correct information
- Observer take notes on use of tool and what they notice about the Coach/Coachee roles

10 Minutes

- Then debrief your observations/prepare to share observations. What did you find easy? What was more challenging? If your group had an observer, what did you notice?

POSSIBLE REAL PLAY SCENARIO

A commitment was made by an employee to Risk Management, for a BMTT deliverable that they need.

The employee is trying to get information in order to create the BMTT. They have followed up repeatedly but have not received the information they need. It is now the day before it is due to the Risk Management department.

The employee approaches their manager on how to handle it as they can't get to resolution but doesn't want to go back to Risk Management.

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LADDER OF INFERENCE - ARE YOU UP A LADDER? OR I AM UP A LADDER

Check intent – is it to punish or assist in your team member's growth?

STEP 1: Data	Who, What, When, Where?
STEP 2: Impact	How does this affect me? I felt angry, sad, afraid, or happy.
STEP 3: Assumption	What is the story I am telling myself about why this happened?
STEP 4: Active Listening	Check for understanding. What have you heard me say? Receiver says what is heard so far.
STEP 5: Accuracy of Assumption	Giver asks - Is my assumption accurate/true? If not, what is your perception of this?

STEP 6: Keep/Stop	It would mean the world to me if you would (Keep/Stop) doing _____.
STEP 7: Desired Change/Start	What would I like you to do differently in the future? _____?
STEP 8: Check for Agreement	Is this something you can do, and if not, what can you do?
STEP 9: Support	Here is how I will support you if you choose to make the desired change. Or ask, What can I do to support you in making this change?
Steps 6-9 are all about making an agreement about the future.	

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LADDER OF INFERENCE - ARE YOU UP A LADDER? OR I AM UP A LADDER

Example - Going up a ladder:

ACTION

I will not invite David to the next meeting.

ASSUMPTION

If people don't care, they shouldn't be invited to future meetings.

ADD MEANING

When someone doesn't contribute it means they don't care.

OBSERVABLE DATA

One committee member is looking at his phone and not contributing to the meeting.

Example - Clearing the Ladder

OBSERVABLE DATA (SPEAKER)

"David, I saw you looking at your phone during the committee meeting, and noticed you did not say anything during the meeting."

ASSUMPTION (FROM THE SPEAKER)

"It's my assumption you may not be engaged in this committee any longer."

PARAPHRASE (LISTENER) AND DIALOGUE (BOTH)

Listener: So you saw me looking at my phone during the meeting and noticed I did not say anything. So you're concerned that I'm no longer engaged in the committee. *Speaker:* Thank you for hearing me. *Listener:* Actually, my wife had an accident. She's okay but I was preoccupied with making sure she was alright.

REQUESTED FUTURE BEHAVIOR CHANGE

Speaker: Wow, I didn't know that. In the future, if an emergency happens, please say "timeout" and let us know that you need to step out of the meeting. I agree that family comes first.

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QUESTIONS TO HELP CLARIFY LADDERS

- What happened?
- What did you do?
- Tell me more about that?
- Who were the key people involved?
- What else was happening?
- What assumptions are you making about what happened?
- How do you know your assumptions are true?
- What might be another reason why that happened?

QUESTIONS TO HELP CLARIFY AGREEMENTS

- What, if anything, do you want them to keep doing?
- What, if anything, do you want them to stop doing?
- What would you want them to start doing differently?
- What questions can you ask them to get their input into improved ways of interacting/new agreements you can make?
- How will you check that you both have a common understanding of the new agreements?
- What support are you willing to provide to help them in making the desired change?

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CLEAR ONE OF YOUR LADDERS

- Think about someone you're up a ladder with.
- Write the data, the assumption, and the requested future behavior change.
- Commit to go and clear the ladder.

STEP 1: Data	
STEP 2: Impact	
STEP 3: Assumption	
STEP 4: Active Listening	
STEP 5: Accuracy of Assumption	

STEP 6: Keep/Stop	
STEP 7: Desired Change/Start	
STEP 8: Check for Agreement	
STEP 9: Support	
Steps 6-9 are all about making an agreement about the future.	

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REAL PLAY ACTIVITY INSTRUCTION (LADDER OF INFERENCE)

10 Minutes

- Decide whether to use the real play scenario provided below or another applicable situation (keep it anonymous).
- Each group will take on roles as follows:
  - Groups of 3: Assign one Coach, one Coachee, and one Observer.
  - Groups of 4: Assign one Coach, one Coachee, and two Observers.
- If you're using a real life scenario, whoever feels they are up a ladder is the coachee.
- Coach helps coachee identify their ladder: the data, impact, assumption and request by listening and asking questions if necessary.
- Coach helps the coachee write down the various steps of the ladder and decide whether the coachee needs to clear the ladder with the individual.

10 Minutes

- Then, debrief as a group how it felt to use the tool and any observations from the exercise.

POSSIBLE REAL PLAY SCENARIO

An employee (coachee) hears that we as an organization may be dropping a benefitas an offering and approaches their peer (coach) concerned about what this means to them and is upset that they overheard this informally.

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PLEASE COMPLETE THE FOLLOWING REFLECTION ABOUT DAY 1 OF THE PROGRAM.

What are my top three takeaways from today?

How will I apply and implement the coaching tools learned today?

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QUADRANT 2 - TRUST

AUTHENTIC BRAND STATEMENT

KEEP/STOP/START FEEDBACK TOOL

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UNDERSTAND/UNTRUSTWORTHY





Identifying **Lack of Trust** with Coachee language:

- It's so annoying to work with them.
- They seem to get it but I don't trust their intentions.
- They only seem to care about their own needs.

Identifying **Understanding** with Coachee language:

- I understand their needs and the situation.
- I understand their perspective but don't agree with it.
- We understand each other's vision and goals.



Understanding Needs

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TOOL: AUTHENTIC BRAND

What do you want to be known for?

How do you want to be seen?

Who are you as a leader?

QUESTION	EXAMPLE	ANSWER
1. What is the ONE leadership role I most want to hold?	*e.g., Senior HR Leader, Senior Talent Role, Go-to Coach for Organization, Project Lead, Department Manager, Division Manager, Vice President, Change Agent, Role Model Leader, Catalyst, etc.*	
2. What is the ONE THING I most want to do/accomplish as I work in my desired leadership role?	*e.g., successfully lead a new program, empower employees to turn around a failing program/ product, invent a new product/ service, help change a corporate culture, etc.*	
3. What is the ONE THING I most want to change as I work in my desired leadership role?	*e.g., Financial loss – turn a company around, My presence – become calm & peaceful; Negative relationship – Foster healthy workplace relationships, etc.*	
4. What is the ONE THING I know I have as a leadership strength that comes naturally to me?	*e.g., providing a safe environment for everyone to speak their truth, inspiring people to give their 100%, setting a clear vision that many follow, etc.*	
5. What is the ONE THING I most wish I would have received from authority figures growing up?	*e.g., seeing and celebrating my unique gifts and talents, modeling a healthy relationship, listening to my point of view, etc.*	

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MY AUTHENTIC BRAND IS...

I am a	#1
who	#2
I	#3
I give this by	#4
and	#5

AUTHENTIC BRAND EXAMPLE

I am a role model leader (#1) who teaches others how to be better leaders through leading by example (#2). I interact without judging or becoming defensive (#3). I give this by understanding individual choices, making wise decisions and meeting my commitments (#4 and #5).

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SUCCESS CRITERIA FOR LIVING MY BRAND

QUESTION	EXAMPLE	ANSWER
1. What is the ONE THING I most want to see as a leader?	*e.g. My mentees all get promoted, my organization transforms into my vision, to sell a big program, etc.*	
2. What is the ONE THING I most want to hear as a leader?	*e.g. "You helped me transform my life," "Without you we would have failed," "You are the best boss," "You helped increase profits by 50%," etc.*	
3. What is the ONE THING I most want to experience as a leader?	*e.g. Going to bed & waking up on a daily basis knowing I am making a difference, leading a high performing team, being recognized as a leading expert in my field, complete fulfillment in my work, etc.*	
4. What is the ONE THING I most want to say as a leader?	*e.g. "I have made the difference I wanted to make & have no regrets," "Listen I have something important to say," "I am the happiest I have ever been," "We need to pull together & get this done," "I balanced a great career & personal life," etc.*	
5. What is the ONE THING I want to feel as a leader?	*e.g. Proud of the life I have lived and the legacy I have left, happy and fulfilled in my life, confident that I gave my all, satisfied with the business results I achieved, etc.*	

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SUCCESS CRITERIA FOR LIVING MY BRAND

As a leader, I commit to:

1		See	#6
2		Hear	#7
3		Experience	#8
4		Say	#9
5		Feel	#10

SUCCESS CRITERIA EXAMPLE

I commit to:

- See people become great leaders because they modeled me. (#6)
- Hear people say that I was the best leader they ever had. (#7)
- Experience a great big party with a room full of people who thought I made a difference in their lives. (#8)
- Say “Wow I balanced a great career and personal life with no regrets of either.” (#9)
- Feel I would not have changed a thing regarding career and personal life balance. (#10)

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BREAKOUT GROUP INSTRUCTIONS

- Share Your Authentic Brand Statement (# 1-5, top of page 26)
- Share how it feels to read your statement aloud

"ONE THING" FOR TODAY

Inspire you to take your brand to your next level and connect with it more deeply than you ever have before.

UTILIZE YOUR AUTHENTIC BRAND IN COACHING

- Every morning, read your brand statement out loud or before and when preparing for a coaching session
- Let your brand guide your coaching presence.
- Continue to improve and adjust your brand statement throughout life.

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KEEP / STOP / START FEEDBACK FORM

Name:
(leave blank to keep anonymous)

I believe that it would be more beneficial and helpful if _____ would:

1. Keep doing the following things:

2. Do the following things less, or stop doing them:

3. Start doing these additional things:

Some ideas for how you can stop or start behaviors identified in #2 and #3 above. (If you need additional space, use the back of this form or additional pages below).

Here is what I will do to support you:

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REAL PLAY ACTIVITY INSTRUCTION (KEEP/STOP/START)

10 Minutes

- Decide whether to use the real play scenario provided below or another applicable situation (keep it anonymous).
- Each group will take on roles as follows:
  - Groups of 3: Assign one Coach (providing structured feedback), one Coachee (seeking feedback on their work style), and one Observer.
  - Groups of 4: Assign one Coach, one Coachee, and two Observers.
- The coach gives feedback using the “Keep, Stop, Start” structure.
- Discuss practical ideas for keeping, stopping or starting behaviors. The coach encourages the coachee to reflect on which suggestions feel actionable.
- The coach offers specific ways they will support the coachee’s development, such as regular check-ins or providing additional resources.

10 minutes

- After acting out the real play, debrief with your group.
- Coach/coachee share your experience using the tool
- Observer share any insights from watching the real play

POSSIBLE REAL PLAY SCENARIO

A manager (coach) is frustrated with one of their direct reports (coachee) for repeatedly not following through on their commitments and not re-negotiating timelines but just ignoring them.

However, the manager is impressed by this employee’s ability to positively influence their coworkers to be motivated.

The manager realizes it’s time to give feedback and uses the Keep, Stop, Start form to structure the feedback.

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QUADRANT 3 - COLLABORATION/ CLIENT FOCUS

AUDIENCE UNDERSTANDING MATRIX

THE 4 P'S OF STYLE RECOGNITION

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UNDERSTAND/TRUSTWORTHY



Trust-Based Relationships

Trustworthy

Untrustworthy

Identifying **Trust** with Coachee language:

- I trust they have the best of intentions.
- We've always had a good relationship.
- I enjoy working with them.

Identifying **Lack of Understanding** with Coachee language:

- That makes no sense to me.
- I really don't understand why.
- I don't know where they got their facts and data.
- They don't understand our vision/goals.

Lack of Understanding ⟷ **Understanding**

Understanding Needs

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TOOL: AUDIENCE UNDERSTANDING MATRIX ACTIVITY FOR YOUR PRESENTATION

- Think of your presentation you are working on in this program.
- Who is your key audience; within that who is/are your key decision maker(s)?
- Complete the matrix for your presentation before you start writing it.

	1	2	3	4
What is most important to them?				
What hooks them?				
What details do they need?				
What are they willing to compromise?				

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AUDIENCE UNDERSTANDING MATRIX EXAMPLE

CIBC EXAMPLE	
What is most important to them?	• Career growth opportunities (promotions, training, recognition) • Exceeding performance goals and expectations
What hooks them?	• Practical tools that make their growth easier • Success stories from peers or role models
What details to they need?	• Step-by-step answers to their questions • Answers and tools to make their coaching journeys easier to execute • Specific feedback tied to measurable goals
What are they willing to compromise?	• Short-term comfort or familiar routines for long-term growth • Some autonomy in exchange for structured support

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REAL PLAY ACTIVITY INSTRUCTION (AUDIENCE UNDERSTANDING MATRIX)

10 Minutes

- Decide whether to use the real play scenario provided below or another applicable situation (keep it anonymous).
- Each group will take on roles as follows:
  - Groups of 3: Assign one Coach, one Coachee, and one Observer.
  - Groups of 4: Assign one Coach, one Coachee, and two Observers.
- Coach helps coachee use the Audience Understanding Matrix to analyze the business unit.
- Coach supports the coachee in identifying key audiences and decision-makers, and in generating insights about them.

5 minutes

- Then, debrief as a group how it felt to use the tool and any observations from the exercise.

POSSIBLE REAL PLAY SCENARIO

The business has asked the talent team to develop some new training content to address a critical business need. There are tight timelines to be met. Jerome is the point person to provide the business with some options, however the business has indicated their availability is limited due to pressing BAU demands.

Jerome has to get details from the business in order to develop the training. He approaches his leader on how to address this challenging audience.

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PLEASE COMPLETE THE FOLLOWING REFLECTION ABOUT DAY 2 OF THE PROGRAM.

What are my top three takeaways from today's session?

How will I apply and implement the coaching tools learned today?

DAY 2 HOMEWORK

10 Minutes: Set Success Criteria for your Brand (pages 27-28).

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STYLE RECOGNITION

STYLE RECOGNITION ASSESSMENT

For each pair of statements below, distribute three points between the two alternatives (A and B), depending on how characteristic of you the statement is. This means that your answers for any pair of statements will add up to three. So in 1A and 1B, you might give yourself a 2 for 1A and a 1 for 1B, which would add up to a total of 3 for that pair set. Although some pairs of statements may seem equally true for you, assign more points to the statement that is more representative of your behavior most of the time.

Examples:

- If A is very characteristic of you and B is very uncharacteristic, write "3" next to A and "0" next to B.
- If A is more characteristic of you than B, write "2" next to A and "1" next to B.
- Please base your answers on how you actually behave, not on how you think you should behave.
- The total points for each question should always equal "3."

1A	___	I'm usually open to getting to know people personally and establishing relationships with them.
1B	___	I'm not usually open to getting to know people personally and establishing relationships with them.
2A	___	I usually react slowly and deliberately.
2B	___	I usually react quickly and spontaneously.
3A	___	I'm usually guarded about other people's use of my time.
3B	___	I'm usually open to other people's use of my time.
4A	___	I usually introduce myself at social gatherings.
4B	___	I usually wait for others to introduce themselves to me at social gatherings.
5A	___	I usually focus my conversations on the interests of the people involved, even if that means straying from the business or subject at hand.
5B	___	I usually focus my conversations on the tasks, issues, business or subject at hand.
6A	___	I'm usually not assertive, and I can be patient with a slow pace.
6B	___	I'm usually assertive, and at times I can be impatient with a slow pace.
7A	___	I usually make decisions based on fact or evidence.
7B	___	I usually make decisions based on feelings, experiences or relationships.
8A	___	I usually contribute frequently to group conversations.
8B	___	I usually contribute infrequently to group conversations.
9A	___	I usually prefer to work with and through others, providing support when possible.
9B	___	I usually prefer to work independently or dictate the conditions in terms of how others are involved.
10A	___	I usually ask questions or speak tentatively and indirectly.
10B	___	I usually make emphatic statements or directly express opinions.

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11A	___	I usually focus primarily on ideas, concepts or results.
11B	___	I usually focus primarily on people, interactions and feelings.
12A	___	I usually use gestures, facial expression and voice intonation to emphasize points.
12B	___	I usually do not use gestures, facial expression, and voice intonation to emphasize points.
13A	___	I usually accept others points of view (ideas, feelings and concerns).
13B	___	I usually don't accept others points of view (ideas, feelings and concerns).
14A	___	I usually respond to risk and change in a cautious or predictable manner.
14B	___	I usually respond to risk and change in a dynamic or unpredictable manner.
15A	___	I usually prefer to keep personal feelings and thoughts private, sharing only when I wish to do so.
15B	___	I usually find it natural and easy to share and discuss my feelings with others.
16A	___	I usually seek out new or different experiences and situations.
16B	___	I usually choose known or similar situations and relationships.
17A	___	I'm usually responsive to others' agendas, interests and concerns.
17B	___	I'm usually directed toward my own agendas, interests and concerns.
18A	___	I usually respond to conflict slowly and indirectly.
18B	___	I usually respond to conflict quickly and directly.

After responding to the 18 questions, review your scores in the table below.

O - OPEN SCORE		G - GUARDED SCORE		D - DIRECT SCORE		I - INDIRECT SCORE	
1A	____	1B	____	2B	____	2A	____
3B	____	3A	____	4A	____	4B	____
5A	____	5B	____	6B	____	6A	____
7B	____	7A	____	8A	____	8B	____
9A	____	9B	____	10B	____	10A	____
11B	____	11A	____	12A	____	12B	____
13A	____	13B	____	14B	____	14A	____
15B	____	15A	____	16A	____	16B	____
17A	____	17B	____	18B	____	18A	____
Total	____	**Total**	____	**Total**	____	**Total**	____

Compare the O and G scores. Write the higher score in the blank below and check the box with the corresponding letter:

Score: ☐ ☐ O or ☐ G

Compare the D and I scores. Write the higher score in the blank below and check the box with the corresponding letter:

Score: ☐ ☐ D or ☐ I

Plot your results on the next page.

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PLOTTING YOUR RESULTS

Score: Open or Guarded

Score: Direct or Indirect

Plot your score below and check mark the box for your preferred style.

- ALL CAPS: Primary Style
- Upper and Lower Case: Secondary Style

OPEN

☐ People PEOPLE	☐ Party PEOPLE	27 26 25 24 23 22 21	☐ People PARTY	☐ Party PARTY
☐ Planner PEOPLE	☐ Point PEOPLE	20 19 18 17 16 15 14	☐ Planner PARTY	☐ Point PARTY
INDIRECT				**DIRECT**
27 26 25 24 23 22 21	20 19 18 17 16 15 14		14 15 16 17 18 19 20	21 22 23 24 25 26 27
☐ People PLANNER	☐ Party PLANNER	14 15 16 17 18 19 20	☐ People POINT	☐ Party POINT
☐ Planner PLANNER	☐ Point PLANNER	21 22 23 24 25 26 27	☐ Planner POINT	☐ Point POINT

GUARDED

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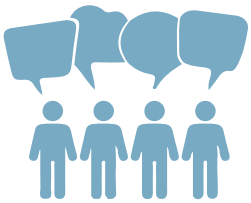
TOOL: STYLE RECOGNITION





	○ PEOPLE PEOPLE	○ PARTY PEOPLE	○ PLANNER PEOPLE	○ POINT PEOPLE
Pattern	Open/Indirect	Open/Direct	Guarded/Indirect	Guarded/Direct
Pace and Orientation	Slower/People Oriented	Faster/People Oriented	Slower/Task Oriented	Faster/Task Oriented
Their Goal	Steadiness	Influencing Others	Compliance	Dominance
Work Area	Casual, Conforming	Stylish, Interesting	Formal, Functional	Busy, Structured
Wants to	Build and Maintain Relationships	Interact and Be Recognized	Gather Information and Know Process	Get to the Bottom Line and Decide Quickly
Fear	Conflict	Loss of Prestige	Embarrassment	Loss of Control
Aggravated by	Insensitivity	Routine	Surprises	Indecision
Makes decision by	Considering Options	Spontaneity	Deliberate Action	Decisiveness
Decisions are	Careful	Impulsive	Planned	Steadfast
Measures success by	Compatibility, Depth of Relationships	Recognition, Applause, Compliments	Precision, Accuracy, Activity	Results, Track Record, Progress

Which style best represents you?

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VERBAL CLUES

Listen carefully in a virtual setting to the words used.

SPEED READ PEOPLE—READING OTHERS' STYLES

Verbal clues: If you meet someone, especially for the first time, and they come on strong, they are likely either a **Party** or **Point Person**.

If they are quiet and soft-spoken, they are probably a **People** or **Planner Person**.

NEXT CLUES: *WHAT* THEY SAY.

	STYLE	TYPICAL STATEMENTS	NOTES
	Point Person	"Tell him I want to talk to him ASAP!" "Let's get this settled right now!" "What's the bottom line?" "Cut to the chase; what are the options?" "Here's how we'll proceed…" "I want to win this – no ifs ands or buts." "Tell me what the goal is." "You handle it, but keep me informed."	
	Party Person	"Hey! Here's an idea! Whattaya think?" "Why don't you noodle on that for a while?" "I feel this is the way we ought to go." "Tell me what you think about…" "Spare me the details. Just give me the drift." "I think we're making progress. Now let's…" "My sense is that…" "Let's try it a different way, just for kicks."	
	People Person	"I'd like to go kind of slow on this. Is that okay?" "Have we determined the impact of this on the staff?" "I really enjoy working with you." "I'd like to help you however I can." "We can work this out, I'm sure." "How do you really feel about this?" "How's this likely to end up? I'd like to know first."	
	Planner Person	"Now, let's look at this logically." "Is that really the right thing to do? Can we justify that?" "Let's take this first step. Then we can decide step two." "Give me all the facts first." "What guidelines make sense for this project?" "Precisely what do you mean?" "I don't want any surprises." "Have we touched all the bases?"	

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ADAPTING TO OTHER STYLES

- Think about someone you have trouble communicating with.
- Determine which style best represents that person.
- Mark the tips you plan to use when communicating with that person.
- Plan your next interaction with that person and use the tips.
- Use the tool again to plan a conversation with another person.

To adapt to People People

Be warm and sincere by:

- supporting their feelings by showing personal interest when possible
- assuming they'll take things personally
- allowing them time to trust you
- discussing personal feelings – not facts when you disagree
- moving along in a slower, informal, but casual steady manner
- showing that you're actively listening

To adapt to Party People

Show interest in them by:

- supporting their opinions, ideas and dreams when possible
- being upbeat, stimulating and fast-pace
- tolerating digressions and not hurrying a discussion
- trying not to argue – you'll seldom win
- being enthusiastic, spontaneous and casual
- explaining how action can enhance their image
- sparing them the details

To adapt to Planner People

Show yourself to be thorough:

- supporting their organized, thoughtful approach when possible
- showing commitment through your actions, not just words
- being detailed, accurate and logical
- listing advantages & disadvantages of any plan organized
- providing solid, tangible evidence
- adhering to established procedures
- giving assurances that decisions won't backfire on them

To adapt to Point People

Be efficient and competent by:

- supporting their goals and objectives when possible
- keeping your relationship businesslike
- using facts – not personal feelings – if you disagree
- being precise, effective and well-organized
- recommending alternate actions with brief supporting analysis
- getting to the point quickly
- stressing competitive results and growth opportunities

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POSSIBLE COACHING QUESTIONS (THE 4 P'S OF STYLE RECOGNITION)

- The coach says to the coachee: "It sounds like it would be helpful to assess their style versus your style and how they might be different. Take a look at this style cheat sheet I just learned. There are four different types of people."
- What kind of language do you hear them using (see Speed Read other peoples styles sheet)?
- What type of person do you think they are?
- What type of person do you think you are?
- How do you plan to adapt your language to their style(see Tailor Your Message to Your Audience)?
- Key take-away - If you treat others as they want to be treated, you will receive better results.

REAL PLAY ACTIVITY INSTRUCTION (THE 4 P'S OF STYLE RECOGNITION)

10 Minutes

- Choose a real life situation (keep it anonymous) or use the Real Play Scenario below.
- Decide who will be the Coach and who will be the Coachee. If you are offering the situation, you will be the Coachee.
- Each group will take on roles as follows:
  - Groups of 3: Assign one Coach, one Coachee, and one Observer.
  - Groups of 4: Assign one Coach, one Coachee, and two Observers.
- Coach uses the cheat sheet on page 41, Verbal Clues on page 42, adapting to other styles on page 43, and possible coaching questions above to drive the discussion.
- Be prepared to share what worked and what did not.
- When choosing a real world situation, think of a situation where you trust intentions but have a lack of understanding.

10 minutes

- Debrief the real play with your group
- How did it feel to use the tool?
- What observations do you have?
- Can you think of other applications for this tool?

POSSIBLE REAL PLAY SCENARIO

Kelly is a manager in the Operations department. One morning, her team member, Jordan, approaches her visibly concerned. Jordan overheard from persons talking in the corridor that the bank is considering restructuring several departments, and Operations might be affected. Jordan is upset and unsure what this means for their role and future.

Kelly is caught off guard and doesn't have any information to confirm or deny the rumor. She decides to speak with her boss, Steve, for guidance on how to address the situation, especially considering Kelly is a Point Person and Jordan is a People Person.

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Coaching Workshop

Creating a Coaching Culture Program

QUADRANT 4 - INNOVATION

CONTINUOUS IMPROVEMENT TOOL

RESPECTFUL WIN-WIN DIALOG TOOL

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UNDERSTAND/TRUSTWORTHY



Trust-Based Relationships

Trustworthy

Untrustworthy

Identifying **Trust** with Coachee language:

- I trust they have the best of intentions.
- We've always had a good relationship.
- I enjoy working with them.

Identifying **Understanding** with Coachee language:

- I understand their needs.
- I understand the situation, but it presents challenges.
- We understand each others vision and goals.

Lack of Understanding ⟷ **Understanding**

Understanding Needs

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CONTINUOUS IMPROVEMENT TOOL

After a project/event, gather critical stakeholders & ask…

- What worked well?
- What should we continue to do in the future?
- What could have gone better?
- What should we do differently in the future?
- Anything we should stop doing for the future?

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RESPECTFUL WIN-WIN DIALOG TOOL

24 ways to get what you want and say what you mean.

USE	AVOID	WHY
"However…" (May also end the sentence and start a new or use "and"	"Yes, but…"	Discounts what is said
"You may be right."	"It is not!"	Hear others thought
"Help me understand…"	"You are wrong."	Reduce conflict
"Let's try this."	"It won't work."	Stimulate creative thinking, even if it seems impractical at first.
"I need your help."	"Here's why this is good for you."	Seek cooperation by asking for help.
"Is everything satisfactory?"	"How can I do better?"	Ask specific, non-emotional questions.
"Here's what I can do."	"Here's what I can't do."	Focus on the positive first.
"Let's work together."	"You must do what I say."	Work with rather than against others.
"Invite you to choose"	"You'll have to…"	"Invite others to cooperate and give them choices."
"Something's, sometimes..."	"Everything, always…"	"Eliminate absolutes"
"What is the fairest way?"	"Do it my way"	"Appeal to other's sense of fairness."
"I understand, I need to look further.."	"I disagree…"	"Accept and acknowledge others' ideas and let them coexist with yours."
"Thank you."	"They know I appreciate them."	"Don't take relationships for granted."
"I choose to make the best of"	"I can't change who I am"	"Choose to respond and not react."
"I can manage my available time."	"I don't have time"	"Eliminate powerless phrases."
"I'll help you myself."	"Ask someone else…"	"Be part of the solution. Don't shift the blame."
"I believe"	"It's only my opinion…"	"Describe accomplishments positively."
"Starting now, I will…"	"If only I had…"	"Focus on choices, not regrets."
"That's all. It's over."	"What if things get worse?"	"Apply energy for a positive outcome"
"I feel upset because…"	"You make me upset."	"Focus on your responsibility."
"Let's give it a chance."	"It won't work."	"Stimulate creativity."
"Hello, I'm _____"	"I just can't remember names."	"Use others' names, if you forget, ask."
"You might want to consider."	"I recommend."	"Look at benefits to others."
"I'm sorry."	"Don't blame me."	"Admit your mistakes and apologize."

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COACHING GUIDANCE

- A coach approaches a coachee to provide coaching on improving open communication with their team.
- The coach shows the coachee the respectful win-win dialog cheat sheet.
- The coach asks which “avoid” on here bother you the most?
- The coach asks, “Which ones do you think you use the most often?”
- “Are you open to coaching on what phrases I have been hearing you say in meetings as I care about your success and I see it shutting down interaction.”
- The coach gives feedback on the three top avoid phrases they hear the coachee using and suggests that they record themselves to hear the actual phrases they are using.
- The coach encourages the coachee to be mindful of when they hear themselves using the avoid phrase and to use the suggested cure – “use” phrase instead as it will help to open up the dialog.
- Get a commitment from the coachee that they will create awareness and work on changing their phrases.

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REAL PLAY ACTIVITY INSTRUCTION (WIN-WIN DIALOG)

10 Minutes

- Choose a real-life situation (keep it anonymous) or use the Real Play Scenario provided.
- Decide who will be the Coach, the Coachee, and the Observer. If you are offering the situation, you will be the Coachee.
  - Groups of 3: Assign one Coach, one Coachee, and one Observer.
  - Groups of 4: Assign one Coach, one Coachee, and two Observers.
- Coach reviews the Win-Win Dialog and questions to drive discussion. Go through each Win-Win Dialog chart on page 48 and the questions on page 49 to assess understanding and identify what information is needed.
- Be prepared to share what worked and what did not.

10 minutes

- Debrief the real play with your group
- How did it feel to use the tool?
- What observations do you have?
- Can you think of other applications for this tool?

POSSIBLE REAL PLAY SCENARIO

A supervisor (coachee) occasionally uses unintentional, dismissive language (e.g. “Yes but, It is not, etc.) in team meetings, which sometimes hinders open communication with his team members. The manager (coach), has noticed this and wants to help the supervisor improve his communication style to foster a more open and respectful environment.

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Coaching Workshop

Creating a Coaching Culture Program

PROGRAM CLOSE

ACTION PLAN

FACILITATOR BIOS

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ACTION PLAN

Use this worksheet to create an action plan for implementing what you've learned.

1. Identify three takeaways from the program.
2. For each takeaway, create an action plan to implement your new skills.

TAKEAWAY 1:

Complete?	Due Date	Action
☐		
☐		
☐		

TAKEAWAY 2:

Complete?	Due Date	Action
☐		
☐		
☐		

TAKEAWAY 3:

Complete?	Due Date	Action
☐		
☐		
☐		

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WHAT TO EXPECT

This coaching conversation is a chance to pause, take stock, and think about how you're integrating what you've learned into your day-to-day interactions. It will happen 1:1, after the three-day program, and is fully confidential.

This is not a training session or performance review. It's a space for you to explore:

- How the concepts and tools from the program are landing for you.
- Where you're seeing opportunities to cultivate more trust and understanding to drive a culture of coaching.
- What feels clear, and what still feels unclear or difficult to apply.

If there's a specific tool or part of the framework that you want to explore further, we can use the session to think through how to apply it in your real-world context. I won't be "teaching" it again, but I can partner with you to help you reflect on how to bring it to life in your work.

WHAT TO REFLECT

To get the most from our time together, you might consider:

- What parts of the program are already showing up in your interactions?
- Which tools or ideas feel like a natural fit - and which ones feel harder to access or apply?
- What coaching tool or insight from this program might have helped you stay grounded and effective in a recent tough conversation - and how could that support your impact in building a trust-based coaching culture at CIBC?
- What's one way you want to practice differently in the weeks ahead?

Come as you are. This session is yours - whether you're ready to talk through a real challenge, map out a next step, or simply make sense of what you've learned.

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CHIEF EXECUTIVE OFFICER



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Dr. Lamm-Hartman is an award-winning global executive and presentation coach, leadership development consultant, speaker, writer, and educator. She is the CEO and founder of Inside-Out Learning, Inc., specializing in leadership and personal development. Inside Out Learning is an active member of WBENC and the global Women's President Organization which only 3% of women owned businesses meet their requirements for membership.

With over 25 years of global experience, Sharon has worked across the United States and Europe as well as Beijing, Hong Kong, Singapore, and Thailand for clients such as Boeing, American Express, GE's Leadership Development Center, Exxon, E*TRADE, ARCO Chemical Company, Mobil Oil Corporation, Berlex Pharmaceuticals, Fannie Mae, Arizona Society of CPA's, Volvo Corporation, and the National Reconnaissance Office. She has designed and delivered over 3,000 innovative programs, including many executive presence and presentation skills programs. Dr. Lamm-Hartman has coached thousands of CEO's, executives and entrepreneurs worldwide.

She worked internally at ARCO Chemical in International Training and Development. She knows what it is like to work internally and has a strong client partnership philosophy. For the past 18 plus years, Dr. Lamm- Hartman has been a preferred executive coach for hundreds of Boeing executives with exceptional results, including promotions, developmental job assignments, and saving E-Series. Dr. Lamm-Hartman has also designed and is teaching The Authenticity Code™ Programs, team development programs, and culture-change offsites to thousands of professionals and leaders world-wide. Up to 80% of employees who participated in these programs have achieved a promotion. Sharon has her Top-Secret Security Access and helps executive clients and customer relationships in classified environments. Sharon has consulted on several corporate change efforts, training change agents, and developing effective strategic implementation and communication plans.

In addition to her private practice, consulting, and being on the global lecture circuit, she is widely published. Dr. Lamm-Hartman has served with the Fresh Start Women's Foundation and Arizona State University's Dean's Board of Excellence Mentoring Program. She was the co-founder and first Director of Central Phoenix Women, a networking organization for women business leaders, and wrote a regular column for Phoenix Woman Magazine. She is a regular instructor for WBENC's WeTHRIVE program.

Dr. Lamm-Hartman holds a doctorate from Columbia University in Leadership and Organization Development, a Masters in Industrial and Labor Relations from Cornell University, and two Bachelor degrees. Dr. Lamm-Hartman also trained as a Life Coach with world-renowned author and life coach teacher, Dr. Martha Beck. Dr. Lamm-Hartman is a Certified Executive and Presentation Coach and is certified in the Myers Briggs Type Indicator.

Dr. Lamm-Hartman is an Adjunct Professor of Leadership at Columbia University where she has taught Leadership classes to Doctorate Level students. She also worked as an Adjunct Faculty member at The Center for Creative Leadership teaching courses on Developing Leadership Talent.

Dr. Lamm-Hartman has been quoted on her views of coaching in numerous publications including, Forbes, CEO Magazine, The New York Times, MORE magazine, and Oprah's magazine, 'O' magazine. Dr. Lamm-Hartman has been honored and received awards from the Center for Creative Leadership and the Academy of Human Resource Development for her work and research on personal transformation and leadership development.

Dr. Sharon recently became a best-selling author in the Wall Street Journal, USA Today and Amazon with her book release of The Authenticity Code™. Her book just received the Axiom GOLD Medalist award for best 2022 Business Fable. WBENC buys her book for all WeTHRIVE participants. She has been named as one of the top 100 Women to KNOW Across America by the KNOW Women Group.

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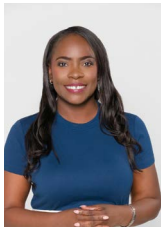
PROGRAM FACILITATOR



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Felecia Williams is a dynamic leader with over 20 years of experience in corporate roles. As a Training and Executive Coach, she specializes in transforming managers and their teams through tailored training, team-building, and coaching sessions. Felecia's expertise spans various areas, including team building, engagement, personal branding, change management, leadership training, personal development, strategy kick-offs, and emotional intelligence.

In addition to her people development expertise, Felecia served as a Marketing Manager at JMMB Group, a leading financial institution in Jamaica, for over six years. There, she established strategic marketing goals, oversaw comprehensive marketing campaigns, and created impactful client communications. Her strategic insight and leadership drove significant growth and engagement across various platforms.

Felecia's career includes international experience with renowned companies such as Red Bull and Oscar Mayer Foods. She has developed and managed high-impact marketing strategies, sponsorships, and events, showcasing her ability to drive brand growth and engagement on a global scale.

As a certified life coach from The Coach Training Academy and holding an MBA from the University of New Orleans, Felecia combines her extensive experience with her academic background to provide executive, career, purpose, and accountability coaching. She is dedicated to helping senior executives, middle managers, and small business owners overcome obstacles and achieve their goals.

Felecia is passionate about leveraging gamification to enhance learning and retention of key concepts, making her training sessions both high-energy and impactful. Her commitment to professional growth and development is evident in her approach to coaching, where she focuses on building trust and accountability to guide leaders on their journey to success.

Felecia holds a BA in Communication from Howard University and has earned several awards, including the Special Award for Going the Extra Mile from JMMB Group and the Best Practice for the English-Speaking Caribbean from Red Bull LATHAM.

Fun Fact: Felecia has paternal twins and loves to travel.

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PROGRAM COACH



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With over 22 years of leadership experience—including 11 years as a CEO—Jonathan ("Jon") Hodge brings a proven track record of guiding organizations through transformation, complexity, and high-stakes decision-making. His work spans diverse industries, helping leaders accelerate performance, build high-impact teams, and align leadership strategy with business goals.

As a trusted consultant, coach, and advisor, Jon has partnered with leaders in high-tech, pharmaceuticals, manufacturing, FMCG, and non-profits. He is known for helping clients strengthen executive presence, lead through change, and drive sustainable growth. His coaching blends business acumen with deep self-awareness, leadership authenticity, and practical, actionable strategies.

Jon holds a Certificate in Executive & Leadership Coaching from Georgetown University and a B.A. in Anthropology from Bates College. He is ICF-certified through Georgetown University's Institute for Transformational Leadership. He also serves on the executive boards of several nonprofits across the Western U.S. and has been a strategic advisor to firms in the talent development space.

Outside of work, Jon finds joy in life's simple pleasures—casting a line in a river, exploring a museum or beach with his wife and two children, sharing a good laugh with friends, or cooking up something delicious in the kitchen.

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