

## Whelan Stone - The High Performance Program

The High Performance Program is a unique approach that combines:

*Best Practices with Executive Coaching. Unlike other programs, participants work with a dedicated team to help them achieve their goals.*

**With an emphasis on Effective Leadership and Negotiation, this program applies best practices to their specific situation.**

### **The Team:**

#### **Fred Whelan and Gladys Stone**

- ◆ Principals at Whelan Stone Executive Search and Coaching and authors of GOAL!
- ◆ Know what issues executives face and how to effectively address them
- ◆ Frequently quoted in: The Wall Street Journal, Fortune Magazine, USA Today
- ◆ Developed the High Performance Program for both senior executives as well as mid-management

#### **GOAL! Your 30 Day Game Plan for Business & Career Success**

- ◆ GOAL! delivers a practical solution to achieving any business or career goal
- ◆ The 30 Day Goal Track has people taking action from Day One
- ◆ Discusses the 7 most common business goals and how to achieve them. These include: "Developing a High Performance Team" and "Increasing Productivity"
- ◆ GOAL! provides tools to help overcome psychological barriers like fear of failure, procrastination and lack of confidence
- ◆ The book contains inspiring stories from industry leaders and how they were able to overcome obstacles to success

### **The Format:**

Participants will work closely with the coaches on a two-on-one basis.

*The Bottom Line: Stronger Leadership Skills and Greater Overall Effectiveness*

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**The Situation:**

As an executive in a large corporation there are many demands on your time. How do you stay current with best practices and incorporate those into your work?

Seminars can provide a lot of good material, but are not necessarily geared towards a specific situation. It is very common for people to attend seminars and then not apply what they have learned when they return to the office.

By the same token, you do not have the time to read through all the latest books on effective leadership and may wonder if executive coaching is right for you.

**The Solution:**

Now there is an alternative that combines the best of seminars (i.e., knowing) with executive coaching based on your specific situation (i.e., doing).

*The Whelan Stone High Performance Program turns knowledge into action.*

**This program:**

- Combines “best practices” from Harvard University’s Program on Negotiation, The Stanford Executive MBA Program, and management consultants, like Jim Collins and Jack Welch;
- Enhances leadership skills and better positions you for advancement;
- Introduces effective ways of dealing with your everyday responsibilities;
- Tailors these new principles to your needs.

It is designed to maximize the results executives will get in a very short period of time. The High Performance Program is a 12 week program that entails:

1. *Situation Assessment:* An assessment in the first session of the executive’s situation and what is his or her greatest need.
2. *Weekly Discussions:* One hour discussions in which we will discuss “best practices” and how they can be applied to the specific situation.
3. *Action Items:* At the end of each session we will determine mutually agreeable action items to work on for the following week. These are the application of the principles in areas like leadership, accountability and negotiations to the executive’s current situation.
4. *30, 60, 90 Day Follow Ups:* After the engagement has ended, there will be three follow-up sessions to ensure that the recommendations are being implemented.

## The High Performance Difference

The High Performance Program has been designed as a blend of executive coaching and the application of best practices. We believe it is through this approach that executives will derive the greatest benefit in the shortest amount of time.

A critical difference from other programs is that Whelan Stone provides a team approach to coaching, in which the principals work together with the client to increase the benefit received. Together we bring three perspectives and over 100 years of combined business experience to assist the participants.

In addition, the application of best practices to his/her individual business situation will enable the executive to see results immediately. Importantly, the theory behind these best practices can also be leveraged with others on the team and within the organization.

This program is designed to maximize benefits within 12 weeks and have the highest level of relevancy for the participants. The results will be:

- Higher performance
- Increased knowledge base and greater job satisfaction
- Larger contribution to the organization

## What People Are Saying.....

*“As the manager of a \$2B business, my responsibilities are broad and deep. This program enabled me to focus on the things that would have the greatest impact. This freed me up to do more strategic thinking and more of what I do best. I learned things that were cutting edge and relevant.”*

**-Fred Holgate, Managing Director at 7-Eleven**

*“Using a combination of advice based on Whelan Stone’s experience and cooperative brainstorming with me, I was able to develop strategies for dealing with professional roadblocks that I had felt were insurmountable within my organization. I was able to see the results, including a major increase in responsibility within my organization that I attribute directly to the guidance they provided.”*

**-David Weinberg, Project Leader at Merck Pharmaceuticals**

*"This program helped me to work more efficiently. More importantly, Whelan Stone helped me clarify my goals as to where I wanted to go within the organization. They then worked with me to create a plan to achieve those goals."*

**-Product Manager at SAP**

## The Program for Senior Executives

### Effective Leadership

Leadership is the linchpin upon which an effective organization operates. The development and refinement of leadership skills increases the effectiveness and overall success of an organization and are critical to the achievement of its goals.

#### Create a vision, one that people get excited about and focus their efforts on

- Discover what makes for an effective vision. What should it look like?
- Learn how to communicate that vision, up and down the organization.
- Aligning the organization around your vision.

#### Develop a team that delivers the organization's goals on a consistent basis

- Learn to gauge who will be an effective employee within the organization, and what to do about the “problem employees”.
- How to leverage people's strengths to maximize their effectiveness. Are they in the right place in the organization?

#### Develop Emotional Intelligence

- Understand the five components of emotional intelligence (i.e., Self Awareness, Self Regulation, Motivation, Empathy, Social Skills) to better motivate your team and reduce turn over.
- How to deal with difficult people (e.g., The Bully, The Manipulator, The Victim) and manage them more effectively.
- Expose underlying problems and improve behavior.
- Maintain a good working relationship with people you don't like or who don't like you.

#### Build an accountable organization, one that is based on communication and trust

- Understand the role of trust inside and outside the organization. How to get it and maintain it.
- Discover the need for consistent integrity. What this entails and why it is so important.
- The critical importance of clarity in achieving accountability.

#### Instill the discipline of execution

- The building blocks and core processes of execution.

***Key Takeaway – New strategies to create a more effective organization through openness and accountability***

### Negotiation

Negotiation happens at every level within an organization: whether you are discussing a raise with your boss, working cross-functionally and/or forming strategic partnerships. While every negotiation is different, the basic concepts are the same. Learning to be a good negotiator is key to achieving overall success.

Negotiating collaboratively

- Develop your BATNA – Best Alternative To a Negotiated Agreement. The better your BATNA, the greater your power.
- Negotiate from both sides of the table.
- Separate the people from the problem, including yourself. How *not* to treat the people and the problem as one.
- Focus on interests, not positions. Concentrate on the underlying concerns of each party to help you reach an agreement.
- Use differences to create opportunities. Invent solutions for mutual gain.

Forging and sustaining solid strategic partnerships

- What to look for in the right strategic partner. Identifying the most suitable partner - one which will yield the highest mutual benefit.
- Getting to know the other side. The better you know them (negotiating team, company, its customers), the stronger your position.
- How to clinch the deal. Getting to “yes” with the fewest concessions.
- Managing the alliance after the deal is done. Building and maintaining trust. Developing a process for joint decision making.

Negotiating under high pressure

- Negotiating when your job depends on it. How to stay focused and in control when the stakes are high.
- Dealing with difficult people. What you can do to neutralize manipulative, hard bargaining tactics.
- Negotiating with people who are more powerful. Strategies for leveling the playing field.
- Planning comebacks and strategic moves ahead of time. Anticipate what might put you in a defensive position and shifting the situation to your advantage.

***Key Takeaway – Powerful strategies to improve your effectiveness in both two-party and multi-party negotiations***

## **Making a Larger Contribution**

Unleash untapped skills in order to expand your contribution to the organization

- Find the keys to identifying your most potent talents.
- Leveraging your 20% (from the 80-20 rule that says 80% of the results come from 20% of your efforts): How to incorporate your greatest strengths to make a larger impact.

***Key Takeaway – Developing your most creative ideas and unique skills to help build your business***

## The Program for Mid-Management

### Managing – up and down

The responsibility of managing, whether it is managing a team or managing your boss, is of critical importance in an organization. The development of strategies and tactics to more effectively manage will result in greater productivity.

#### Learn how to recruit and retain the best people

- Understanding the generational differences and how to manage accordingly.
- How do Gen X-ers and Gen Y's look at the workplace and their careers?

#### Discover ways to inspire your team and get the most out of them

- How can you effectively leverage the unique talents of your team members?

#### Learn effective, pro-active ways to work with your boss

- How to deal with your boss, no matter what management style they have.

**Key Takeaway – Practical applications for creating and leading a more productive team**

### More Effective Project Management

Every organization's ability to succeed is based, in part, on its ability to efficiently manage key projects. When projects are managed on time and on budget, and aligned with company goals and objectives, the organization thrives.

#### Learn the three levels of project management and how to leverage each of them to the fullest

- Understand the strategic, tactical and operational aspects of every project.
- Discover how to effectively influence each of the levels through communication strategies.

#### Project execution and control

- Understanding the importance of information collection and distribution.
- Which levels should get certain information?
- The critical nature of project closure – how to effect this and why.

**Key Takeaway – Essential strategies for effective project management**

## Higher Productivity

Productivity is the engine that drives every organization. When employees are able to work more effectively and efficiently, they deliver more of what the company needs.

### Knowing and doing what is most important

- Understand and implement the 4 quadrants of time management.
- Learn how to make time for the “Not Urgent and Important” projects.
- Recognize the importance of “first things first” and then do them.

### Running high impact meetings

- Manage meetings that are on schedule, on purpose and on time.
- Leverage your time and others to the fullest extent.

**Key Takeaway – Disciplines for achieving greater results in less time**

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**Key Takeaway – Developing your most creative ideas and unique skills to help build your business**

### Areas of Expertise:

- Leadership Coaching
- Career Management
- Negotiation Coaching
- Assimilation – new position

### Professional Experience:

- Fred Whelan:  
Principal, Whelan Stone  
Managing Director, Stratford Group  
Search Firm  
Vice President, J. Walter Thompson  
Marketing, Clorox & H.J. Heinz
- Gladys Stone:  
Principal, Whelan Stone  
Executive Recruiter, Stratford Group  
Search Firm  
Director of Human Resources, SDMA  
Law Firm

### Education:

- Fred Whelan:  
Wharton MBA, University of  
Delaware BA
- Gladys Stone:  
San Francisco State University, BA

### Professional Affiliations:

- The Society for Human Resource  
Management
- American Marketing Association
- SOCAP – a Global Customer Care  
Organization
- Asia America MultiTechnology  
Association

### Background:

**FRED WHELAN** is founder of Whelan Stone, an executive recruiting and coaching firm, headquartered in San Francisco. His company acts as a catalyst to Fortune 500 clients to accelerate the development of their management teams in the areas of: project management, high performance team development, and effective communications. Years of coaching has enabled Fred to harness the latent talents of individuals and bring them to the forefront of their organizations. Fred has been featured in the Wall Street Journal, Entrepreneur, and the Huffington Post. Fred is a frequent speaker at industry conferences and has authored a career blog on The Huffington Post.

**GLADYS STONE** is an executive coach and recruiter who injects a dose of adrenaline into corporations and individuals to empower them to perform at higher levels. Gladys headed up the Human Resources function, Gladys started her recruiting career with a high tech search firm. Gladys then joined Stratford Group in 1996 as a member of the High Technology Marketing Practice. In addition to a successful track record in placing executives in companies ranging in size from start-ups to Fortune 500 companies, Gladys continues to leverage her background and go beyond typical search parameters by providing HR counsel to her clients with respect to best practices.

Whelan Stone was launched in 1999 with the premise of providing a unique team approach in order to benefit its clients. The Firm has successfully employed this approach which has proven to be very effective. In late 2004, Whelan Stone introduced its High Performance Program to address needs in executive coaching.

### Client Results:

- Coached senior executive at a \$12B Retailer at a time when the company was restructuring. This executive was able to keep his team motivated under difficult circumstances. Importantly, we helped him leverage the situation to expand his role within the organization.
- Motivated a 17 year veteran of a major pharmaceutical company to seek out and make a larger contribution. This individual received a promotion as a result of our work together.
- Helped Vice President of Fortune 100 financial services company become more effective in her role. As a result, she initiated a new project which significantly increased revenue.