



Executive coaching: dialogue for learning, leading and driving results

Mobius Coaching Model

Coaching Philosophy

- A trusting, open, honest and mutually respectful relationship between client and coach provides the foundation for a successful coaching outcome.
- Both the client and the coach need to recognize that there is a gap between current reality and the client's full potential and align around a set of coaching outcomes.
- Viewing the client from a systemic perspective is key to understanding the client's situation and setting and achieving appropriate goals.
- The coach gathers peer feedback and offers input to the client to heighten interpersonal awareness. The coach then plays a significant role in challenging the client to consider transformational outcomes of the coaching relationship which the client might not identify on their own.
- The coach can be of service by holding the client accountable for their choices and responsible for authoring an effective life.
- Learning, on the part of the client and coach, is fundamental to a meaningful coaching relationship, as well as to a successful outcome of the coaching process.

Distinctive Approach and Quality Standards

Our approach to coaching is based on two decades of learning and research in the field of organizational learning and systems thinking. It focuses on five interwoven domains of executive development: physical, cognitive, emotional, interpersonal and spiritual.

Our coaching model focuses holistically on increasing self-awareness, changing mindsets and frameworks for action and fostering sustainable behavioral shifts. Our highly applied action learning model uses real-time client challenges to place the individual client in the specific systemic context in which they operate. Much of our coaching work teaches clients to become reflective practitioners, stepping outside the pressures of everyday business and looking at their work lives with fresh eyes.

This increased personal fluency and self-management produces enhanced leadership and collaboration. The mindsets of adaptability, self-control and accountability support the building of a high performance organizational culture and the achievement of powerful business results.

Mobius coaches are chosen for their seniority and maturity in the field of coaching and most enjoy a thriving individual practice working with C-Suite executives. Many of our coaches have founding and/or leadership roles in the following bodies: The annual Executive Coaching Summit, an international think tank for senior executive coaches; the International Consortium of Coaching in Organizations and the International Coach Federation.

Mobius provides supervision groups for ongoing professional development, peer-led feedback and sharing of best practices. In addition, we sponsor a monthly global Master Class by telebridge to widen the breadth of expertise, approaches and methodology to which our coaching cadre has access.

Coaches Qualify by Completing an Intensive Three-Level Screening Process

Level I

The potential coach must apply and be accepted by the leaders of our Coaching Practice based on an interview, an evidence based assessment process with master coach evaluators and ICF accreditation. Priority is given to those coaches with operational leadership experience in a large company and master coach certification (PCC or MCC) from the ICF.

Level II

From a wide pool of several hundred Mobius coaches, with an array of backgrounds and experience, a group of candidate coaches are selected to meet the sponsor organization's coaching needs and requirements. This becomes the dedicated pool of coaches who then familiarize themselves extensively with the organization's culture and its goals for the coaching initiative.

Level III

A final matching process occurs, in partnership with the sponsoring organization, when individual clients select or are matched with particular coaches. This match is based on the client's needs and preferences, the organization's perceived needs of the individual, and the knowledge the coaching practice has about the unique attributes of each coach. Once assigned a client, coaches confer throughout a coaching engagement to share insights that arise from the coaching relationships within a particular organization.

Discrete Practice Elements

ENTER the Coaching Relationship

- Establish contractual terms with sponsoring organization, where appropriate
- Pre-match client with coach to best fit their individual needs
- Clarify client's commitment and readiness to engage in a coaching relationship

1. Establish and Commit to or Renew the Coaching Relationship

- Test the “fit” between coach and client
- Build trust
- Discuss expectations, including parameters of the coaching relationship, such as ways of working (face-to-face, phone, email) and frequency and duration of sessions

2. Clarify Aspirations and Current Reality

- Establish overarching aspirations for personal development
- Position these aspirations within broad life purposes and organizational objectives
- Explore where client is in the system, how s/he sees the system and other players in it, how s/he is perceived by the system
- Share feedback, as available, from pre-coaching diagnostic assessments and stake holder interviews

3. Set Goals for Development in a Systems Context

- Obtain client commitment to specific areas of development
- Set appropriate balance between leveraging strengths and focusing on developmental needs
- Clarify desired outcomes and strategies to get there
- Align around measurable results

4. Support Learning in Action

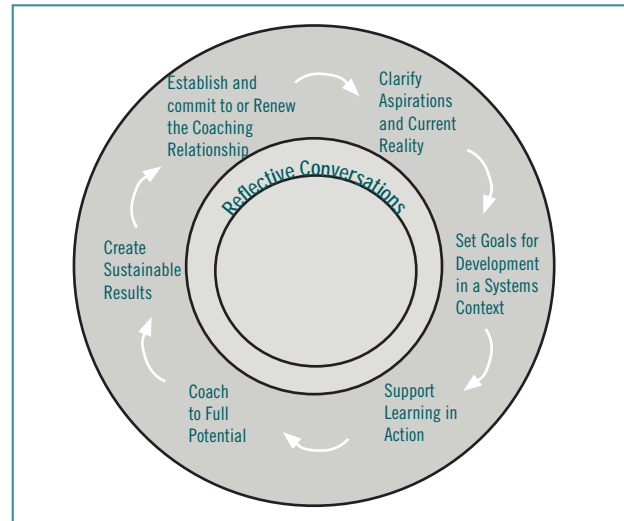
- Select naturally occurring challenges (“practice fields”) to serve as learning opportunities between sessions
- Explore what worked, what didn't, why, unintended consequences, and how this knowledge impacts future behavior
- Use the dynamics of coach/client interaction as data for mutual reflection
- Balance adaptive change with respect for individual pacing and integration

5. Coach to Full Potential

- Challenge client to stretch beyond their comfort zone
- Assist client to deconstruct truths, assumptions, and beliefs about who they are and the world in which they live
- Challenge client to explore different and broader perspectives than what initially appear available or possible
- Encourage action experiments where client solicits feedback from the organization on newly adopted mindsets and behaviors

6. Create Sustainable Results

- Identify structures in client's environment that support their new perspective and new behaviors
- Identify strategies to incorporate reflection time and build self-awareness



- Identify and embed ongoing feedback mechanisms
- Develop social networks for continued growth

EXIT the Coaching Relationship

- Review outcomes against initial goals, baseline, and established measures of success
- Celebrate success!
- Action Plan for ongoing professional development

Recursive Practice Elements

Partnered Reflection for Learning and Results

- Hold a coach/client reflection at end of each session to check on progress in session, clarify next steps and their link to developmental goals
- Create structures to support client reflection between sessions (e.g., client learning journals shared with coach, co-development groups for peer learning)
- Conduct periodic mutual “big picture” reflection throughout the engagement

Generative Conversations

- Coach by using listening, paraphrasing, requests, assessments, assertions, and other linguistic acts in support of development goals
- Create conversations that free clients from past constraints, support them in inventing new futures, and open new possibilities for being and doing
- Include cognitive, emotional, and somatic awareness and experiences in the conversation

Mobius Community of Practice

- Apply a rigorous learning process on three levels: what we learn about coaching, what we learn about the organization, what we learn about coaching within the organization
- Explore ways to leverage information gained through coaching to enhance the organizational system
- Partner with the organization so it benefits from knowledge gained through coaching, while also protecting the confidentiality of our clients

Executive Summary

- Mobius Executive Leadership is a premier organizational consulting, training and coaching company which focuses on organizational evolution and personal mastery.
- Enjoys a close association with the Harvard Negotiation Insight Initiative at the Harvard Law School and draws its senior team from the Harvard Law School, Stanford Law School, Harvard Business School, Columbia Law School, John F. Kennedy School of Government and other top tier academic settings
- Consultants have worked with over one hundred Fortune 500 companies
- Fifty core consultants and a team of several hundred globally placed mature executive coaches

Overview: Mobius Executive Leadership is a premier organizational consulting, training and coaching company with an expertise in organizational evolution and personal mastery. Closely associated with the research and application center at the Harvard Negotiation Insight Initiative, we bring best in class offerings in transformational learning to senior level audiences. The programs we offer synthesize organizational systems thinking, mindset and capabilities knowledge and integrity and personal character development.

Mission: Mobius partners with companies to support two complementary goals: to embed exceptional leadership and communication skills in their workforce and to foster the health and vitality of their employees in order to produce outstanding business results.

Clients: Our consulting efforts have created high-profile results in more than one hundred Fortune 500 companies in diverse industries (banking and securities; consumer packaged goods; high-tech; insurance; media and entertainment; petroleum; pharmaceutical and medical products; private equity; retail; and telecommunications) and professional services firms. Over the last decade alone, our senior team has trained more than 10,000 corporate executives, lawyers, managers, judges, diplomats, and NGO's in order to build their capacity.

Principals: Principals include: Amy Elizabeth Fox, MA, the former Associate Director of the National Religious Partnership for the Environment, co-founded with Vice President Albert Gore Jr. and Dr. Carl Sagan and now the Founder and CEO of Mobius Executive Leadership; Erica Ariel Fox, J.D., a Lecturer at the Harvard Law School and Founder and Director of the Harvard Negotiation Insight Initiative; Mark Thornton, former Chief Operating Officer for JP Morgan Private Bank in London; and Jennifer Cohen, founder of the Center for Meaningful Leadership and a thought leader in the field of ontological and somatic coaching.

Corporate Experience: Goldman Sachs, Deloitte & Touche, Gap Inc., Merrill Lynch, Citigroup, Standard and Poors, Capital One, National Association of Securities Dealers, CIBC Mellon, Bank of Montreal, Royal Bank, JP Morgan, TIAA-CREF, Wachovia, PhillipsConoco, Arbitron, American Management Systems, Citrix Systems, Intuit, The Mathworks, Xilinx Inc., Cox Communications, The New York Times Company, CIT, Target, Lexmark, REI, Global Environment Fund, Genentech Inc., Johnson and Johnson Pharmaceutical, Genzyme Pharmaceutical, Proctor and Gamble, The Macerich Company, Selective Insurance, PPD, Sanofi-Aventis Pharmaceutical, Cubist Pharmaceutical, Monotype, and KB Home.

Size of Consulting Team: Behind us stands a core cadre of fifty seasoned organizational consultants living primarily in the United States and Europe but deployed as organizational consultants and trainers world-wide. Our team of consultants brings the collective experience of 1000 years of consulting work.

Size of Coaching Cadre: Mobius includes a network of several hundred senior executive coaches, and expert trainers/facilitators residing and practicing in North and South America, Europe, Australia, New Zealand and South Africa.

“Sustainable transformations follow a predictable pattern of buildup and breakthrough. Like pushing on a giant, heavy flywheel, it takes a lot of effort to get the thing moving at all, but with persistent pushing in a consistent direction over a long period of time, the flywheel builds momentum, eventually hitting a point of breakthrough.”

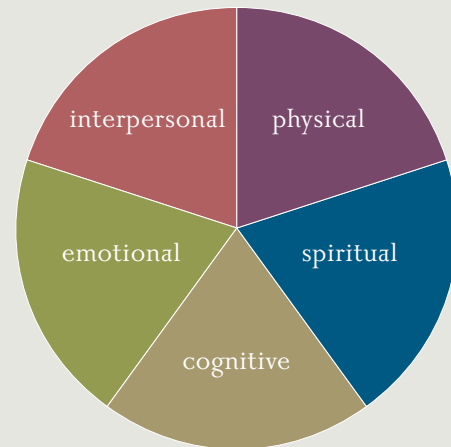
JIM COLLINS
Good to Great



MOBIUS TRANSFORMATIONAL COACHING

Executive Summary

- Coaching model focuses holistically on increasing self-awareness, changing mindsets and frameworks for action and sustainable behavioral shifts.
- Highly applied action learning model using real-time client challenges for coaching conversations to maintain focus on enhanced business results.
- Strong emphasis on building relationship skills that enable leaders to establish and sustain deeper relationships (with clients, colleagues) as counselors and trusted advisors



Vision: The Mobius Transformational Coaching model immerses clients in a transformational experience that transcends the acquisition of knowledge, skills, and tools—but rather fosters professional, intellectual, and personal development at the deepest levels. The coaching relationship challenges executives to grow as leaders, to shape powerful ideas into competitive solutions, and to think and manage differently in a changing and fast paced business environment.

The Mobius Transformational Coaching model is holistic in nature, focusing on various interpersonal and intrapersonal dimensions of executive functioning. The aspects of reflection and practice include the Physical, Cognitive, Emotional, Spiritual and Interpersonal domains of a leader's world. Our leadership development and coaching efforts put equal emphasis on the domains of “doing” and “being”, combining cutting-edge social technologies with a wider set of tools for developing inner maturity and depth. We are ideally working on individual leadership development with senior executive teams (micro) while working on organizational systems design and organizational evolution (macro) so the company can enjoy the synergies between these efforts.

Focus of Transformational Coaching: Doing, Thinking, Feeling and Being: All of our leadership and coaching work addresses multiple aspects of organizational life including: clarity of vision, ability to inspire, team building, skill to negotiate, ability to intervene in and transform conflict, know-how in systems design, tools to engage dialogue and build consensus around strategy and other mission-critical issues, working in ways that reflect and reinforce one's core values, taking multiple perspectives, empathizing with others, and executing against a plan. There is a consistent focus throughout on leadership presence, self-knowledge, and personal mastery. Our leadership and coaching model focuses on four aspects of Self: our actions, our thinking and mindsets, our mood and emotions and our “beingness”. This model of whole person in action enables us to look at the underlying factors driving a person's interpersonal behavioral footprint and coach them towards more choiceful behavioral repertoires that enable improved business results.

Our extraordinary consulting team fosters reflection and strategic action on the business critical issues all leaders face. We collectively have wide experience designing, implementing, and leading large-scale change efforts. The values based approach we take to our work enables us to help our clients align to their own corporate values, personal ethics and individual vision for their mission and contribution.

Seniority of Coaches and Consultants: For C-Suite and other senior executives we have a tier of senior consultants who serve as executive coaches. Many of these senior consultants serve as Lecturers at the Harvard Law School, at Stanford Law, at

Columbia Law, and at other law schools teaching Negotiation, Business Ethics and Conflict Resolution. Others have been leaders in the field of coaching for the last fifteen years, including practitioners who have worked with the International Coaching Federation, MIT Learning Laboratory, Executive Coaching Summit, The International Consortium of Coaching in Organizations, Action Science/Action Design, and The Newfield Network.

We are confident that our team represents one of the highest caliber communities of practice available anywhere to coach and assist leaders in organizations.

Creating Reflective Practitioners: Much of our coaching is aimed at teaching our clients to become reflective practitioners of their own interpersonal style. Focusing on a chance to examine both a person's actions and moves in dealing with business challenges as well as their mindsets and assumptions allows our coaching to raise awareness and choice. As our colleague Bob Putnam has remarked, "The power to reflect allows us to step outside the pressures of everyday business and see things in a new light. The trouble is, most reflection occurs privately in hallways or after the fact, when it no longer has the power to affect outcomes. Reflecting-in-action is the paradoxical ability to step outside immediate events while still in them. It helps us consider fundamentally different alternatives while taking account of current constraints. Working with others in the moment, we can create more effective action." Mobius coaching fosters the competency of reflecting in action, what our colleague, Bill Ury, refers to as "Going to the Balcony" so action choices are more informed, decisive, equanimous and productive.

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ROBERT PUTNAM

Mindsets and Leadership: Richard Boyatzis, in his new book on Resonant Leadership, articulates three key mindsets for leaders to cultivate: mindfulness, hope and compassion. In its deepest strands, and underlying its mindset and framework models, Mobius aspires to foster these attributes in its clients, offering tools and practices to engender greater degrees of self-awareness, personal mastery and connectivity with others.

This enhanced personal fluency and self-management, combined with greater emotional intelligence and flexibility of action produces enhanced possibilities of leadership and collaboration. It undergirds any high performance organizational cultures and achievement of sustainable and powerful business results.

At its best, Mobius Coaching ignites leaders with increased awareness, consciousness, and wisdom, and the capacity to use them skillfully in challenging circumstances.

Leadership is both active and reflective. One has to alternate between participating and observing. Walt Whitman described it as being "both in and out of the game." Although the principle may be easy to grasp, the practice is not. Rather than maintain perspective on the events that surround and involve us, we often get swept up by them. Exercising leadership and bearing personal responsibility requires seeing the difference between oneself and one's role. Distinguishing role from self is not a prescription for keeping emotions — values and passions — at a distance and disingenuously playing a role. But it enables an individual not to be misled by his emotions into taking statements and events personally that may have little to do with him.

RONALD HEIFETZ
Leadership Without Easy Answers



Our Intellectual Frameworks and Underpinnings

Executive Summary

All of our coaches have a strong fluency with the best in class research and thinking on personal mastery and interpersonal effectiveness. This includes, but is not limited to:

- Familiarity with the Harvard Negotiation Project methodology for communication and relationship management and certification in the Mobius Transformational Coaching Methodology;
- Familiarity with other seminal scholarship on leadership from Harvard University including Bob Kegan, Ron Heifetz, Chris Argyris and Action Science;
- Familiarity with emerging Neuroscience, trauma and quantum physics research; traditions and practices in somatic coaching and ontological coaching;
- Familiarity with emerging research on moods and emotions including but not limited to Daniel Goleman's models of Emotional Intelligence, Paul Eckman, John Gottman and Daniel Wile; David Kantor of the Family Institute of Cambridge as well as Gestalt Psychology, Psychodrama, Group Dynamics and Transactional Analysis;
- Meditation, Stress Management and Mindfulness techniques;
- Organizational Systems Thinking and High Performance Culture Development;
- Organizational Evolution and Change Management

Program on Negotiation

The Program on Negotiation at the Harvard Law School (PON), founded in the late 1970's, is a world-renowned interdisciplinary center on negotiation and conflict resolution. A preeminent think tank for emerging theory on deescalating and mediating conflict, PON draws from numerous fields of study, including law, business, government, psychology, economics, anthropology, and education. As a center for application and dialogue PON works to connect rigorous research and scholarship with a deep understanding of practice.

Mobius Executive coaches are subject matter experts in the win-win models for collaboration and resolving conflict developed at PON and presented in the seminal books Getting to Yes and Difficult Conversations.

Our work at PON has put us in close conversation with thought leaders such as Daniel Goleman, Bill Ury, Bob Putnam, Bob Kegan, Dianne Argyris, Diana Smith, William Issacs, Michael Wheeler and Bruce Patton.

Action Science/Action Design

At Yale, Harvard Business School and the Harvard Graduate School of Education, Chris Argyris, along with the late Donald Schon built a school of research and intervention called Action Science. Argyris discovered and articulated concepts now in the common lexicon of organizational consulting and coaching, such as "The Ladder of Inference," "Combining Advocacy and Inquiry" and "Single and Double-loop learning". Peter Senge's The Fifth Discipline, and Stone, Patton and Heen's work Difficult Conversations are both examples of influential research and practice in which Argyris' work was a key influence.

Mobius interventionist and coaching faculty Dianne Argyris carries on a second generation of Action Science practice. As an apprentice with her father, she was involved in much of the early research that resulted in the now-standard concepts mentioned above. She has applied Argyris and Schon's research to the design of an unusual and powerful coaching practices. These practices focus on the use of close observation, various strategies for "embedding" the coach in the world

of the client, and extremely close feedback loops based on these direct observations. Having been present at the earliest stages of research into some of the key concepts mentioned above, she is able to integrate them into her practice and the Mobius coaching approach in a highly pragmatic and seamless manner.

Somatic Coaching and Neuroscience

In coaching we are generally looking at the way a client thinks, behaves and takes actions. We are then creating a series of coaching interventions that address both shifts in thinking and mood management and alterations in behavior (Thinking, Feeling and Doing) thereby shifting results. There is, however, one crucial element missing from this widely used change model. All mental phenomena and all action in the world happen in the context of a physical body.

Generally, we are unaware of how the physical body is informing, shaping and altering our thinking, our mental maps, our moods and our actual behavior in the world at large. In contrast, in Mobius Transformational Coaching, a somatically informed coaching methodology, we work with clients at every level of their being: the physical body, the mental structures, and the spirit.

We are first and foremost biological beings who eat, sleep, reproduce, fight, run and freeze all in an effort to survive. Under pressure any biological organism responds in certain ways. The human organism is no different. For instance, you walk into the board room for a meeting with your executive team and the CEO. Within the first several minutes of the meeting the CEO fires someone in front of the whole group. Every organism in the room is instantly perturbed: blood pressure changes, heart rate speeds up, hormones are released and the reptilian brain registers this experience as one of immanent danger. The room is so quiet you might say everyone is frozen in their seat, and from a physiological perspective you would be accurate. Any biological organism would either fight, freeze or flee in the face of this kind of danger.

Though not a tiger on the tundra, this scenario is our modern day equivalent. Most people are likely to take no action (i.e. freeze) rather than confront the CEO or leave the room. What the most recent neuroscience is illuminating is that when a human being alerts to danger they lose their capacity to think creatively and quickly and to act nimbly and flexibly. When perturbed in this way any organism has its attention focused firmly on its survival.

Innovation, strategy and reflection all happen in the neocortex of the brain to which we have limited access when in this agitated state.

Somatic coaching teaches people how to work with the physical body in order to mindfully focus and pro-actively return to a physiological state where they are once again capable of effective action and to condition themselves to operate with ease, grace and efficacy under pressure or perceived conflict. As with any top performing athlete, we offer clients a range of practices that build *stamina, presence, focus, empathy and integrity* so that mind and body are operating in concert and on command.

Our somatic discourse draws most specifically on the latest Neuroscience and quantum physics; on the work of somatic trauma expert Peter Levine and on the pioneering teaching of Dr. Richard Strozzi-Heckler, Ph.D. who has single handedly championed the relevance of the body in coaching practice. His teachings have infiltrated, in limited form, many coaching schools including The Newfield Network and elsewhere.

Ontological Coaching

Ontology, the art and science of being, is derived from the philosophical work of Martin Heidegger as articulated in his text *Being and Time*. To address “being” in coaching we must understand that we are not solid, rigid beings but rather malleable. With increased awareness and skill we can alter or transform our way of being. In turn, we will generate more

Organizations are repositories of cumulatively built up knowledge; principles and maxims of practice, images of mission and identity, facts about the ask environment, techniques of operation, stories of past experience which serve as exemplars for future action. When a manager reflects in action, he or she draws on this stock of organizational knowledge, adapting it to some present instance. He or she also functions as agents of organizational learning, extending or restructuring, in their present inquiry, the stock of knowledge which will be available for organizational (change).

DONALD SCHON
The Reflective Practitioner

effective action and unprecedented levels of integrity and effectiveness. Human “being” is antecedent to human “doing” so in order to achieve sustainable action changes a powerful coaching exchange has to address this foundational and existential aspect of a clients’ make-up. In ontological coaching we assert that “being” is the source of all effective “doing” and that leadership evolution requires this level of dialogue and trustful coaching.

Many Mobius coaches have broad exposure to the leading thinkers and theorists in the development of ontological coaching. Among Mobius senior consultants are former close colleagues of Fernando Flores and Julio Olalla, pioneers in Ontological Coaching. Many Mobius coaches are studied in the methodology of Ontological Coaching, and still more are graduates of The Newfield Network training and Landmark Education leadership courses.

Moods and Emotions

Human thought and human emotions are married for life: One never goes anywhere without the other. At Mobius we coach people to be smart about feelings so that they can think clearly, build rapport and trust with their colleagues and develop feeling informed wisdom both at home and at work. We work to clear emotional roadblocks to productivity and to reinforce the feelings foundations for sustained satisfaction and lasting health.

Recent organizational thinking has posited that emotional intelligence and strong interpersonal and intrapersonal skills are a far more reliable predictor of organizational and managerial success than technical expertise. As a cornerstone of our coaching practice we teach emotional self-awareness, mood management and the capacity to “go to the balcony” and negotiate with one’s own reactivity and defensiveness as a key leadership capacity. Emotional self-awareness and self-management are core competencies in the domain of relationship skills.

Mobius’s coaching approach was shaped with significant input from leading thinkers in multiple disciplines of psychotherapy and group work. We drew on their expertise in gestalt, psychodrama, family systems work, group dynamics and narrative therapy to inform our curriculum design work in the domain of coaches training, conversational courses and leadership curriculum as well as to shape our coaching models.

Organizational Systems Thinking and Building a High Performance Culture

Mobius’s approach to building high performance teams is an integral approach.

The dynamics of Systems Thinking play out in three domains that find coherence in any team or organization. Increasing teams effectiveness sustainably involves an understanding of how objective systems (all things measurable), conscious culture (rules of engagement), and individual thinking and behavior interact to generate or hinder the desired results of a strategic vision. Too often, companies most commonly pay attention to the most easily manipulated objective systems without a clear understanding the critical interplay among the three components.

For example, a highly functioning HR system may well be hijacked by some unproductive leadership behaviors that generate dysfunction. Or, a well meaning cultural attribute can easily be railroaded by a contradictory functioning system. In each case the opportunity or desire for lasting organizational change is missed because of the lack of integration.

While visioning towards the future is important and necessary, our approach requires a rigorous observation of a team’s or organization’s current reality in each domain without filters. While this approach can be a difficult process, it is this very honest reflection of behavior, culture and systems that illuminates the integral gaps and leverage points for creating change. This integration bridges the usually disconnected individual coaching, team learning and system changes toward a common purpose resulting in more dynamic business advantages.

Organizational Evolution and Change Management

Managing transition well is a central factor in the ultimate success of any company. Like a hockey puck sliding across a smooth piece of ice, the dynamics of change move quickly and constantly, making it hard to know where to focus. More often than not, organizations suffer through change. Inattention to the organizational and human aspects of

Management works hard at reducing the causes of embarrassment or threat by creating sound organizational structures or policies. Management also creates programs or visions toward excellence that, in theory, can be used to counteract the rigidity, hopelessness, and cynicism of the organization...”

CHRIS ARGYRIS

Overcoming Organizational Defenses

change is often the culprit. Even strategic initiatives that make good business sense can fail because the leadership, workforce, company systems and culture cannot evolve in alignment with each other.

Everything you want
is just outside your
comfort zone.

ROBERT ALLEN

The good news is that handled well, corporate change can be creative and enormously constructive. At Mobius Executive Leadership, we help leaders to understand the underlying features of successful business transitions. This includes assisting them to make wise choices to meet immediate business demands while keeping a firm grasp of the strategy and longer-term corporate issues. Our extraordinary consulting team fosters reflection and strategic action on the essential issues companies must confront in building their enterprise.

Our coaching cadre has sensitivity to the business challenges faced during a period of rapid change. Our coaching supports our intervention work with organizational evolution by focusing on the mindsets needed to manage well in periods of uncertainty, constant innovation, and quick decision making.

Meditation and Mindfulness

Through our close association with the Harvard Negotiation Insight Initiative we have been part of a growing trend exploring the application of perennial wisdom and mindfulness practices to leadership development. We have been developing new syntheses of organizational systems thinking in dialogue with wisdom masters whose expertise lives in cultivating inner awareness, mindfulness and presence including, but not limited to, Jon Kabat Zinn, Norman Fischer, Joseph Goldstein, Tara Brach, Sharon Salzberg, Joan Halifax, Lama Surya Das, Rabbi Moshe Waldoks, Genpo Roshi, Japanese Zen Abbot Paul Silverman and Mobius Principal Mark Thornton.

A recent issue of Business Week (10/30/06) included a special report in the “significant but sometimes quirky new trend” in which businesses are embracing Indian philosophy and mediation practice. Companies, it reports, are increasingly making links between the development of intellect and the focusing of concentration that can control the mind and body and the business results and success an executive is capable of. Likewise, business schools, they report, are adding courses that combine ancient wisdom with the needs of modern managers.

Peak performing athletes and elite military teams know that high performance requires more than a skill set. To deliver breakout performance under intense competitive pressure requires superior mental clarity, focus, problem solving ability and perspective. Each one of these skills provides critical competitive advantage and can be the difference between winning and losing. Mobius wisdom practices include meditation, guided visualization, somatic coaching and biofeedback. These practices dramatically enhance a leader’s ability in each of these key areas. These practices are integrated, as appropriate, into some of our leadership curricula and coaching sessions. Mobius coaches have at their disposal real time, state of the art bio feedback technology to dramatically show how a leader’s state can be enhanced with these wisdom practices as well as tools for increasing concentration, flexibility, and relaxation.

Mind/Body Renewal

Mobius Executive Leadership offers ongoing renewal retreats called the Mobius Leadership Intensive. Available to all client companies, this three day state of the art mind/body program includes extensive health diagnostic pre-work followed by a retreat program in a rustic location. In this premium executive conference setting, participants receive consultations with myriad world class health practitioners including nutritionists, pain and injury specialists, exercise physiologists and physical therapists. The Intensive also includes sessions of yoga, meditation, therapeutic massage, Alexander technique, and Five Element acupuncture. Optional modules include multiple types of transformational bodywork, somatic coaching intensives, and creativity, team building and self-expression modules such as expressive arts, play and innovation programs and wilderness experiences and time in nature. Aspects of this whole person approach (including meditation/mindfulness, somatic practices and yoga) are incorporated into many of our training programs including our year long coaches training program.



Measurable Results

Mobius Partners with Gaiasoft International in the on line learning and assessment aspects of our training and coaching programs. Primarily we use an electronic scorecard, with regular self-assessment tools, to measure the outcomes of our training and coaching work with clients. This behavioral tracking mechanism enables us to closely monitor the efficacy of our programs. It also enables us to continue to deliver new content, ongoing assignments and practices through e-learning.

Measurable Results

Our coaching framework supports development of awareness and competence in a number of key relationship areas. In each area, clients increase self-understanding, develop new action strategies and shift their mindsets for handling challenging business circumstances. For us, progress in each area is measured in behavioral impacts. Ultimately our coaching is about engaging the whole person in developing the whole person – individually and in organizational context; in behavior and in performance; developing IQ, EQ and SQ for sustained success.

The coach and client work with the same framework of behavioral and performance measures. A simple monthly practice of self-assessment, commitment making and action taking ensures that attainment is measurable. An on-line coaching scorecard tracks declared intentions, attainment, insights and actions.

The combination of coaching, practice and an on-line support system provides a resilient structure for developing and embedding high performance behaviors.

Gaiasoft Integral Scorecard

The Integral Scorecard provides proven, scalable performance management and program management for transformation, governance and management. Integral Scorecard is used with simple, train-the-trainer practices to implement transformational programs in single businesses and across large organizations and systems.

While many performance management systems focus only on outputs, Integral Scorecard also supports the EQ and SQ (emotional and spiritual intelligence) that bring personal meaning and coherence. Integral Scorecard also manages the day-to-day actions that deliver results. Integral Scorecard can be used to define and implement complex transformation strategies and processes.

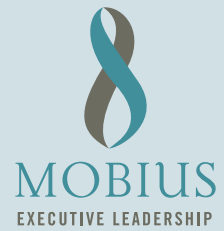
About Gaiasoft

Gaiasoft, a London based company, provides solutions for implementing and sustaining performance and transformation in organizations and complex systems. The 'GAIA' in Gaiasoft stands for Governance, Accountability, Implementation, Alignment – achieved through a simple and proven process. As a word, Gaia also refers to the planet as a system – indicating Gaiasoft's whole systems approach. The 'soft' refers not just to software that runs on computers and networks, but also to the soft systems by which organizations and teams collaborate with coherence, alignment and synergy.

Proven Solutions

Gaiasoft solutions uniquely support measurement of 'soft' skills and 'hard' performance. Gaiasoft provides simple, proven, scalable performance transformation solutions. Gaiasoft's products, services and associates reduce the cost, time and risk of successful transformation by using the dynamics of emergence to focus and align vision, intention and action. Gaiasoft's products are used extensively by global multinationals, such as Philips, and government organizations like the City of Johannesburg and Crossrail – which is planning the largest construction project in Europe. Gaiasoft's current projects include support for the EU funded MIDIR (Multidimensional Integrated Risk Governance) project. The project is using Gaiasoft's Integral Scorecard and DNA Library products to develop a management tool and re-usable blueprint for risk and resilience. This builds on Gaiasoft core team's decades of experience in delivering management solutions to large businesses and governments.

Our Coaching Cadre: Size, Geographic Coverage and Expertise



Executive Summary

- Mobius Executive Leadership has fifty core senior consultants and coaches.
- Mobius can deliver best in class coaching services on all seven continents, using regionally based executive coaches of the highest caliber.
- Mobius coaches tailor their coaching approach to consider regional differences.
- We have rigorous professional accreditation requirements and select coaches who share our values based approach.
- Our coaches have significant corporate experience working with senior organizational leaders.
- Mobius is affiliated with several international bodies of senior executive coaches to widen still further its capacity for global roll-outs.
- Our competency model for coaching focuses heavily on personal mastery and maturity.

Who We Are: Our first layer of active executive coaches are drawn from the fifty consultants who serve as trainers, advisors, facilitators and coaches for a wide range of Mobius corporate clients. In addition to this core group of exceptional professionals, we have close ties to several hundred of the most expert coaches around the world.

Our international breadth is enabled by our close relationships and active participation in some of the most prestigious global networks of professional coaches and coaches training programs.

Our active participation in these forums enables us to influence the future outlook of the coaching profession, foster high level professional standards, and stay fluent with the state of the art coaching methodologies. Our coaches have founding and/or leadership roles in the following affiliative bodies:

- The annual Executive Coaching Summit, an international think tank for senior executive coaches;
- The International Consortium of Coaching in Organizations;
- International Coach Federation and
- The international practitioner community affiliated with the Harvard Negotiation Project.



Selection Criteria and Competencies

Executive Summary

Mobius Coaches are selected from among the most senior and experienced executive coaches worldwide. We have rigorous criteria for screening and placing mature professionals in the arenas of executive and leadership development.

Criteria for Selecting Coaches

Among the key criteria used to select coaches are the following:

- Professional Accreditation as a Master Certified Coaches through the International Coaches Federation;
- Senior Level Experience as exemplified by five or more years of experience working in corporate organizations as an internal or external coach to managers, vice president and above and/or;
- Five or more years of experience in leadership development, transformational leadership development or human resources senior role in the arenas talent management, learning and development or organizational development;
- Alignment with Mobius approach to transformational coaching and learning as expressed by a demonstrated depth of personal practice (personal mastery and quality of presence), articulated alignment with Mobius values of service, integrity, and professionalism and impeccable reputation in the industry.
- Business acumen and experience

Competencies for Mobius Transformational Coaches

In terms of competencies, we vet coaching candidates for personal mastery and presence as expressed in the following interpersonal and intrapersonal attributes:

Commitment: Expressed desire to support people to be their best; deep and abiding commitment to the greatness of human beings.

Listening: Must already have some capacity to listen deeply and be “present” to someone without fixing anything. Offering presence, empathy and deep listening rather than moving anyone to action. To be able to listen to what someone is saying and also hear into the equally critical silence of what is not being said. Patience.

Acceptance: Must ultimately be able to walk between the paradox of deep acceptance of a client exactly as they show up and the willingness to stand for and push them towards their own betterment. Committed and willing to fight for their client to be bigger than they know themselves to be.

Emotional Intelligence: High levels of emotional intelligence, empathy and ability to facilitate personal mastery conversations; authentic and congruent; can serve as confidant and advisor to even senior leaders and executives.

Integrity: Highest levels of personal and moral courage and impeccable behavioral standards. Acknowledges when their behavior falls short and makes amends.

Walk Your Talk: Coaches who are willing to engage themselves in inquiry and transformation at the same level and with the same commitment they are asking of their clients.

Business Acumen: Coaches who are at ease in the business environment, understand how corporations work, and use a vocabulary that speaks to their business clients.

Self as Instrument: Coaches who are willing to offer their own life experiences and journeys and insights in the service of the client's learning, as appropriate.

Trust: Must be able to produce, maintain and repair trust.

Humility: Demonstrates a continuous willingness to learn and to laugh at their own shortcomings and blind spots.

Adult Learning: Must have an informed view of the neurological, psychological, intellectual and social underpinnings of effective adult education and the capacity to build and foster a dyadic conversational learning relationship.

Willingness to Confront: Mature capacity to maintain rapport and good will while holding the tension of confrontation and possible interpersonal conflict. Coaches must routinely serve their clients by calling attention to disabling and ineffective interpersonal habits and confronting points of unconscious action and then manage resistance and anger.

Ethics: Spotless ethical record and highest professional standards of maintaining boundaries, decorum, confidentiality, contracting and managing commitments and promises. High levels of personal accountability.

Maturity and Legacy: Able to think past immediate life cycle and employs a developmentally adult time horizon, including the legacy and long term impact of their choices and the consequences of their actions. Maturity can, in part, be defined as the ability to think ahead to several generations when weighing options for action.

Maturity and Multiple Perspectives: Another developmental hallmark of maturity is the ability to hold diverse perspectives

Maturity and Reflection in Action: Coaches need to be able to step back from the domain of doing to reflect on themselves as an actor and to teach and cultivate that capacity of the reflective practitioner to clients.

High Performance: Fluency with high performing organizational cultures and an ability to direct coaching towards organizational objectives and improved and sustained business results.

Working with Resistance: Understanding the myriad forms of learning resistance and how to break through resistance in clients to foster development. Makes sophisticated distinctions between resistance that indicates a wise and unconscious calibration of integration versus denial or defensive deflection. Challenging gaps between espoused theory and theory in use (action theories) to increase alignment between a client's intentions and the impact their actions produce in the world.

Some tools for keeping on track: The pursuit of being right usually results in being alone. Learn that you don't always have to be right. Instead, learn to learn, so that you can (work) together. Do not assume that only one of you can be right. Shift the strategy from attacking to evoking, from changing to being curious again. Avoid blaming your colleagues. Instead, take personal responsibility.

DAVID KANTOR
*My Lover, Myself:
Self-Discovery Through Relationship*

"...the kind of hope I often think about... I understand above all as a state of mind, not a state of the world. Either we have hope within us or we don't; it is a dimension of the soul, and it's not essentially dependent on some particular observation of the world or estimate of the situation. It is an orientation of the spirit, an orientation of the heart; it transcends the world that is immediately experienced and is anchored somewhere beyond its horizons.

Hope, in this deep and powerful sense, is not the same as joy that things are going well, or willingness to invest in enterprises that are obviously headed for early success, but, rather, an ability to work for something because it is good, not just because it stands a chance to succeed. The more unpropitious the situation in which we demonstrate hope, the deeper that hope is. Hope is definitely not the same thing as optimism. It is not the conviction that something will turn out well, but the certainty that something makes sense, regardless of how it turns out.

It is also this hope, above all, which gives us the strength to live and continually to try new things..."

VACLAV HAVEL
playwright and defender of human rights, former president of Czechoslovakia



Master Coaches: Being and Doing

Executive Summary

- Mobius coaches are thought leaders in the field of executive development.
- Our coaching uses power of observation, diagnosis, close feedback loops, and intuition to work spontaneously with clients
- We draw from an enormous repertoire of tools and experience, grounded in decades of organizational research and theory on leadership development and personal awareness.
- Mobius coaches are selected as much for who they are as for what they know or what they have done.
- Mobius coaches are amazing catalysts listening in an attuned manner for what wants to emerge with the client in that moment.
- Mobius coaches are committed to each individual coachees professional development and evolving competency in the intrapersonal and interpersonal domains
- The Mobius coaching program is an active community of practice that engages in ongoing professional development, peer coaching, regular supervision and contributes to the evolving field of coaching and organizational culture building.

Coaching involves the transfer of sophisticated techniques and tools that can help clients conduct their business affairs more effectively. At the same time, there is a transmission of knowledge and methodology and the cultivation of insight via the vehicle of a one on one coaching relationship. One distinction of mastery in the Mobius coaching model is that our executive coaches are thought leaders in the field of executive development and personal growth. In addition to a wide body of professional experience and best in class interpersonal technology to draw from, Mobius coaches are also sophisticated synthesizers and improvisers, who are able to respond with a customized coaching process for each individual client. They are also helping advance the field itself by their innovative contributions to theory and application.

The real master coach can walk into any situation and be able to clearly diagnose what is going on, know what interventions are possible, and choose the appropriate practices and tools to draw on in the moment. The unique alchemy between a seasoned coach and their client enables breakthrough insights on the part of the client. These new self-understandings foster significantly enhanced business acumen, influence and efficacy as a result.

One final and significant hallmark of a master coach is their own quality of being, the authenticity, presence and power they bring to their own interactions and coaching. For us, the congruence and personal integration along the domains of the coaching model (cognitive/mental acuity, emotional intelligence, physical well-being and renewal and spiritual or values based integrity) are vital attributes. This powerful way of being enables our coaches to use a “*self-as-instrument*” model of coaching in which the coach is modeling the very qualities of personal awareness and self-management being cultivated by the client.

Ancillary Coaching Services: Assessment Instruments

In addition to building one on one coaching relationships with coaching clients, we are often asked to conduct targeted psychological and professional assessments. Mobius can add any of the following assessment tools into its coaching offerings:

- Mobius 360 degree core competency instrument for coaches
- Bar-On EQ-i
- The Hogan Instrument
- DISC Inventory
- Emotional Competency Instrument (ECI)
- Myers Briggs Type Indicator
- Leadership Competencies for Managers
- Leadership Practices Inventory
- Vision Quest Consulting’s Leadership and Communication Style Survey
- Center for Creative Leadership 360 degree instrument
- Bob Kegan’s Four Column Commitment Tool

Background: The Coaching Horizon: Anticipated Trends in Coaching Industry Over the Next Five to Ten Years



Executive Summary

In an annual strategic planning meeting of the International Coaches Federation's Executive Board held in early November 2006 a series of global trends were identified as factors influencing the future shape of the coaching industry.

Coaching as a field of practice is enjoying a period of rapid growth and broad acceptance. It is increasingly recognized as a vital part of supporting leadership development within companies and an invaluable tool for senior executives to utilize. Having an objective sounding board for key strategic questions, as a confidant for leadership challenges, and as a mirror for intrapersonal development is an enormous resource. The coaching field itself, as it matures and becomes embedded within companies, is influenced by external environmental and contextual factors. Among the trends being watched, globally, by leaders in the coaching movement are the following:

Globalization: An increasing globalization geographically, politically, and environmentally. Companies will be trying to survive in an increasingly global, interconnected business ecosystem. A recent issue of Business Week notes, "While corporations used to do most of their manufacturing, product development, and administrative work in-house the emphasis is now on using outsiders. Terms such as "extended enterprises" (companies that outsource many functions), "innovation networks" (collaborative research and development programs) and "co-creation" (designing goods and services with input from consumers) are the rage."

Complexity: An increasingly complex, fast paced and over stimulated culture requiring a stronger focus on balance, harmony and renewal. Effective coaching relationships offer an opportunity for reflective dialogue in an unhurried and private setting. This consultative relationship can provide a welcome pause from the constant execution of tasks and enable a more restorative and educational organizational environment.

Talent Gap/Talent Exodus: In 2001, industry insiders started to flag the growing need to focus on talent development and a companies talent pipeline. Most notably was the groundbreaking book **The War for Talent** by Ed Michaels, Helen Handfield-Jones, Beth Axelrod which put the world on notice of this immanent crisis. The consulting firm McKinsey & Co. coined the phrase "War for Talent" several years ago when its surveys revealed a diminishing talent pool. The basic McKinsey principle asserts that employers must adopt innovative recruitment techniques. In their seminal book, the authors offer many examples from companies like the Limited, Enron and Amgen. Among their suggestions: offer mentoring programs; encourage employees to switch departments; and with senior hires, look for "leadership style and values" consistent with "the company's culture." Continuing the discourse, a Deloitte research paper on the failure of Acquisition and Retention Strategies in talent management (2004) noted that "CEO's of successful companies are worried about the dwindling supply of talent. In just a few years, they posited, two emerging trends will "force organizations to start paying unprecedented attention to their critical talent: the retirement of the baby boomers and the struggle of many schools to meet the demand for qualified talent. As its foreword noted, "Companies that want to dominate their industries must be able to attract and retain talented employees. They must also engage people like never before if they want to innovate and grow. Only those

[We need to] focus not just on the building of more knowledge but on the fashioning of new relationships to the knowledge we already have. Perhaps we will learn to move our Big Assumptions to a place where we have them, rather than the more customary place where they have us. Perhaps we need leaders who are able both to start processes of learning and to diagnose and disturb already existing processes that prevent learning and change.

ROBERT KEGAN & LISA LASKOW LAHEY
How the Way We Talk Can Change the Way We Work

companies that win the hearts and minds of their top talent will be able to deliver value over both the short and long terms.” This more personal engagement with the workplace and an alignment between the corporate mission and an employee’s sense of career planning and involvement are part of the coaching mandate.

Genius is nothing but a greater aptitude for patience.

BENJAMIN FRANKLIN

Creating a Coaching Culture: Increasingly companies will not just hire external coaches or even have a small scale coaching initiative for senior executives but rather will establish a coaching culture for their organization, building a cadre of strong internal coaches who provide ongoing coaching to all but the top tier of the organization. They will also train managers to provide greater ongoing talent development, performance feedback and coaching to their direct reports.

Managing a Global Workforce: An increasingly global workforce will significantly change work/life issues and create demand for more flexible and inclusive work environments that increasingly welcome the whole person as employees arrive to their work place.

Each of these factors would inform any coaching solution provided by Mobius Executive Leadership.

Who are we as humans in language? Every day we find ourselves in conversation, effortlessly stringing words like beads, telling stories and connecting with others. In general, we think of language as descriptive of things that happen. But, in fact, while that is not incorrect there is a very important distinction that is missing.

Words do describe how we see the world, but more importantly, they are powerfully generative. When we speak we are revealing and declaring “our very being-ness”. When we listen, we are generating meaning. When we become acutely aware of our thoughts and how they generate our relationships, actions and future, our very way being shifts.

When things are going along swimmingly our words and our actions are transparent. But when some event triggers us, all of a sudden the easy transparency of life is gone. There is a break in the action. Suddenly there is an issue. The world didn’t behave like we thought it should. Our very personal interpretations kick in, “this shouldn’t be happening,” and now, we are paying attention.

This is the defining moment. Now, “who we are and how we are” in the world reveals itself. If we become aware of this critical distinction, rather than this moment being a problem, it is an awakening. With this simple look my very core can shift. The world looks different. I am no longer the same observer. This is an ontological shift.

Ontological coaching is about increasing one’s awareness of the blinding transparency we call life. And it is about busting the stories that drive behaviors that do not serve us as individuals, or as leaders. With that comes a new awareness, a new observer, and a new interpretation of the world.

We are not static beings stuck in the stories we have collected. Rather we are unfolding humans speaking, listening and learning into our future.

CHUCK WISNER

Mobius Senior Consultant and Executive Coach



Background: Coaching Skills for Professional Services Firms



Goals of Program

Transformational Coaching assists people to improve their results by enhanced capabilities in four core areas:

- Understanding Clients and their problems
- Relating authentically with Clients
- Taking Skillful Action to Help Clients Succeed
- Modeling Healthy and Effective Leadership as an Example for Clients

Step One: Understanding Clients and Their Problems

- The first step in coaching is to learn how to understand clients and their problems
- We teach coaching tools and methods on how to establish trust with clients and how to gain a core understanding of the issues they face. Deep listening and interviewing skills are core competencies
- We offer tools for mapping organizational systems for putting a client's problems in a larger context

Step Two: Relating Authentically with clients

- The next step is learning to relate authentically with clients
- This involves basic elements of emotional intelligence, often neglected in the course of building analytic intelligence and skill
- Focus on relationship building skills including empathy, use of self-disclosure, and tracking someone's business and personal stressors and context. Skills for building and maintaining trust are core competencies

Step Three: Taking Skillful Action to Help Clients Succeed

- On the foundation of understanding client problems and relating authentically to clients, leaders in our coaching program learn how to take skillful action with clients
- The behaviors we teach people evolve from an "expert" model where they tell all the answers to a "coaching" model where they assist clients to flourish
- Skills for diagnosis, dialogue, high quality inquiry and facilitative leadership are core competencies

Step Four: Modeling Healthy and Effective Leadership as an Example for Clients

- In our view, coaches must live by the principles they offer to clients
- In our program we help leaders to use the methods and tools we offer in our coaching to understand their own challenges, to relate authentically to the people in their own lives, and to use our core skills and tools for their own success

Mobius offers professional services firms a chance to skill up their senior teams in coaching skills in five non-concurrent training days. The first three days are followed by interim coaching in which they are actively engaged in coaching clients and receiving ongoing supervision on those client contexts. The group then comes together a second time, usually separated by a period of four to six months, for two days of role-playing and application sessions.

In addition, Mobius Executive Leadership is preparing to pilot a year long coaches training programs for professional service firm personnel interested in becoming trained executive coaches, and for facilitator's, coaches and other seasoned professionals who want broader exposure to the Mobius Transformational Model and the assorted toolbox of communication and relationship skills developed at the Harvard Negotiation Project.