



# Epiphany's Essential Leadership Coaching Guide



Challenge your people.  
Ignite your business.

## WHY YOU ARE READING THIS NOW

As an HR leader, you are responsible for the human element of business success. You need to grow your top talent, fill new roles and ensure success in current roles. This is where we come in and make your life *easy*.

You've likely experienced a few significant shifts and challenges in your work environment as leaders and priorities collectively respond and adjust to COVID-19. Some organizations are thriving, some are sinking, and some barely noticed a difference.

KPMG's recent CEO Survey noted that "talent was the top threat" to businesses right now.

- Do you have key leaders that you need to develop to retain?
- Key leaders that require support to be successful in their roles?
- New leaders you want to support to accelerate through their first tough year?
- A succession planning slate of talent to ready up to the next level?

We know that developing your people is key to retaining them, especially since talent is now being lured away by distant markets who are hiring remote people.

We know that leaders, especially new leaders, are undergoing more stress and demands to lead virtually, and it isn't really an option for these leaders to fail.

Now is the opportunity to offer 1:1 coaching to your key leaders to support them, grow them and keep them.

**As much as we are a coaching company, we're also a strategic HR partner, ready for you to leverage. We are ready to give you creative, flexible and effective development solutions that fit your current situation and get the results you need.**

## HOW WE HELP

We develop and support your leaders to be their best.

Strong leadership is a marriage of the heart and mind. It's a combination of mindset, skills, competencies, and capabilities.

It requires a leader to be open and experiment with new approaches to achieve different results. Coaching provides leaders focus, clarity, support and accountability so that leaders can be intentional, grow their self awareness and experiment to new heights of success. Coaching is an on-going partnership to support the leader over time as they navigate new situations and evolve their leadership.

Leaders define their own goals. Leaders make their own decisions. Leaders choose their own pace. Coaches navigate the conversations and share observations and tools to move leaders forward. Every coaching session ends with specific action items that move the leader one more step forward.

Our coaches both champion and challenge leaders to reach their potential.

### Why People Come to Us/Top 5 Reasons for Coaching

Here are the 5 most common reasons that HR leaders hire us to coach their leaders:

1. New Senior Leader in Role
2. Leader in a Key Role
3. Valued Leader with 1 or 2 Areas that Need Development
4. Need to Provide Their Leader with Growth and Development Opportunity
5. Need to Develop Their Leader for Succession Planning

## 1. New Senior Leader in Role

You need your new senior leaders to quickly and skillfully ramp up, navigate their new roles and drive results. There is a lot at stake, a lot to do and it's generally overwhelming for them. We partner with your leaders in their first 12 months to keep them at the top of their game as they work to gain business knowledge, build new relationships and culture, gain credibility with their team and typically drive both change and results. We accelerate their success by helping them stay focused, move through obstacles more quickly, get clear on priorities and solutions, reduce stress and overwhelm and apply different approaches and strategies as they need it once step at a time. We meet them where they are at and move them forward.

## 2. Leader in a Key Role

Never has there been a more important time to invest and support the key leaders in your business. Key leaders are big contributors to your business success. With economic instability, leading virtually, and constant change and transformation, leaders have a difficult job, at the same time that strong talent isn't easy to replace. We work with your key leaders to support them to deliver on their biggest goals and priorities and be effective in their roles. They have a dedicated space to reflect, explore and resolve the important situations and issues that come up over the year.

## 3. Valued Leader With 1 or 2 Areas that Need Development

Your strong and valued leader may be very effective overall; yet, you have identified 1 or 2 areas that would benefit or require development. For example, they may do a great job achieving goals but need to soften their edges with people; or they may be great people leaders but lack the influence, confidence or presence to drive stronger results. There are many capabilities and competencies that we develop with leaders to grow their effectiveness overall.

## 4. Need to Provide Their Leader with Growth and Development Opportunity

Your people value the opportunity to continue to grow and develop. In fact, it is a growing top consideration of employment. They want opportunities to build new skills, competencies and capabilities. We work with your people to identify and develop specific areas often based on report results, manager and HR input and 360 feedback. Through a combination of discussion, reflection, exercises and tools, they gain new insight and apply it one step at a time. Coaching is an excellent development choice because it is personal, custom and supports them over time.

## 5. Need to Develop Their Leader for Succession Planning

As an HR leader, you have your eye on the people and skills you need today and into the future. As leaders move up and move on, it is important to have people who are "ready" for those open roles. We work with your people to ready them for new levels of opportunity. In some cases, we create formal career development plans and discuss career paths while in others we focus solely on growing specific leadership skills and capabilities that they will need at the next level of leadership so that your people are ready when you need them and your organization doesn't suffer from unfilled leadership roles and untapped potential.

## OUR PROCESS

**We know that you need more than just a great coach.**

**Epiphany's Coaching Management System is our end to end solution to manage the coaching program for both you, the HR sponsor, and the leaders we coach.**

It's systematic, scalable and flexible so you have visibility, reporting and participation as the HR leader coupled with a strong and consistent experience that is well managed for your leaders.

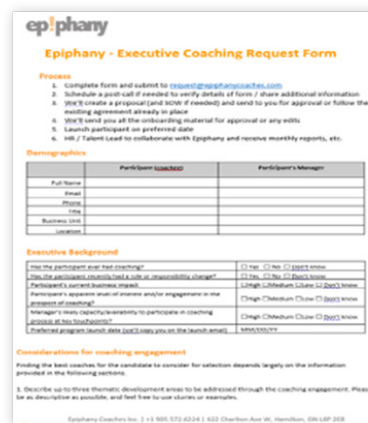
We provide communications, materials, tools, launch events, flexible delivery, reporting and our dedicated Client Service Manager so that we can roll out a program to any number of leaders at a time.

We provide support for every step of the process and invite your participation along the way.

## Strategic Alignment

We work with you to map your goals and priorities to a coaching solution that is custom fit for you and your leaders. We can do our best work when we understand how we are supporting your business and create the best program for your leaders. In many cases, our HR sponsors will join our team for briefing calls so that we can learn and understand your company culture and climate as we work with your leaders.

We are also happy to recommend selection and onboarding approaches, 360 tools, and delivery models based on our 20 years of experience and to incorporate your specific needs and requests.



The form is titled "Epiphany - Executive Coaching Request Form". It includes a "Process" section with 6 steps: 1. Complete form and submit to request@epiphanycoaches.com, 2. Schedule a post-call to verify details of form / share additional information, 3. You'll create a proposal (and have it ready) and send to you for approval or follow the meeting agreement already in place, 4. We'll send you all the onboarding material for approval or any edits, 5. Launch participant on preferred date, 6. HR / Talent Lead to collaborate with Epiphany and receive monthly reports, etc. Below this is a "Demographics" section with a table for "Participant Information" and "Participant's Manager". The "Participant Information" table has rows for Full Name, Email, Phone, Title, Business Unit, and Job Title. The "Participant's Manager" table has rows for Name, Title, and Business Unit. Below this is an "Executive Background" section with a table for "Executive Background" and "Manager's Role". The "Executive Background" table has rows for "How the participant came to coaching?", "How the participant's current role is changing?", "Participant's current business goals", "Participant's experience level of previous coaching or engagement in the past year of coaching?", "Manager's role in coaching engagement to participate in coaching program?", and "Coaching program launch date and location you are the launch area?". The "Manager's Role" table has rows for "Manager's Role" and "Manager's Title". Below this is a "Considerations for coaching engagement" section with a table for "Considerations for coaching engagement".

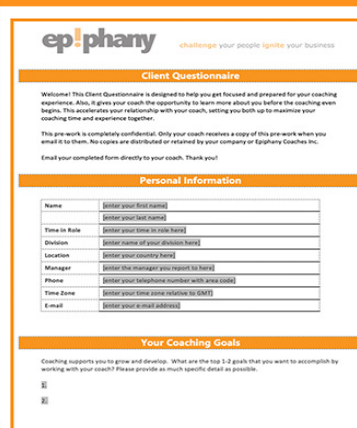
Our Coach Request Form is one way that we streamline the process for you, allowing you to share all the necessary details for us to set up a coaching program.

Some HR leaders work very closely with us and prefer to be heavily involved in all steps along the way; while others prefer to have us manage the program components for them and keep them informed. Our intent is to be flexible and collaborate with you.

## Design & Setup

We believe in strong onboarding! We build custom communications and share onboarding materials such as our Client Questionnaire, What is Coaching Video and our Getting Started with Coaching Deck. We even create materials to support the manager of the leader. Our Client Services Manager prepares and manages all these details for your leader including briefing the coaching team and readying our online coaching portal. Here you have an opportunity to vet and further customize this material before your leader is launched and coaching begins.

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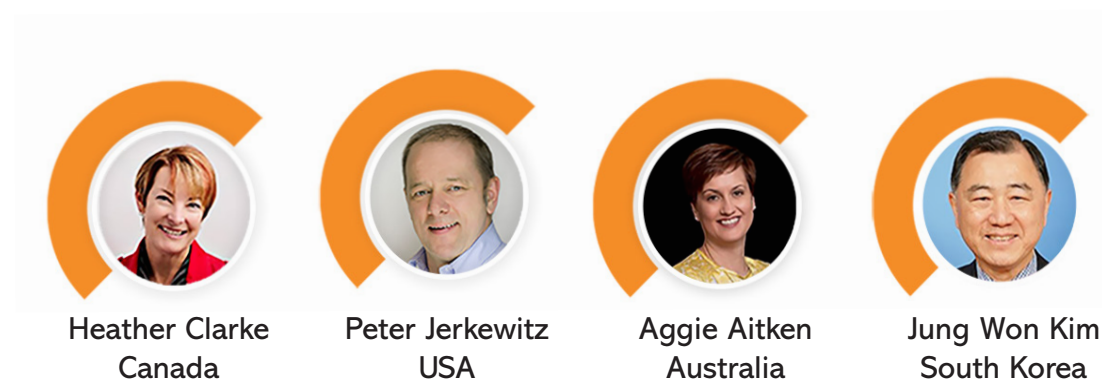
The form is titled "epiphany challenge your people ignite your business" and "Client Questionnaire". It includes a "Welcome!" section with a paragraph about the questionnaire. Below this is a "Personal Information" section with a table for "Personal Information" and "Your Coaching Goals". The "Personal Information" table has rows for Name, Email, Time in Role, Division, Location, Manager, Phone, Time Zone, and E-mail. The "Your Coaching Goals" section has a paragraph about coaching goals and a table for "Your Coaching Goals".

## Coach Selection

Our Electronic Coach Selection Tool is a fast and effective way to offer a coach selection to your leaders. Each leader can view several coach bios to determine the best fit before making a selection. Typically, we select 4 coach bios from our global coaching team for your leader to view, based on your leader's exact coaching needs.

Your leader will also have the option to set up chemistry calls with short-listed coaches they like to ensure there is a great fit before making a final selection.

Once the coach is selected, your leader is automatically connected to their coach through our online



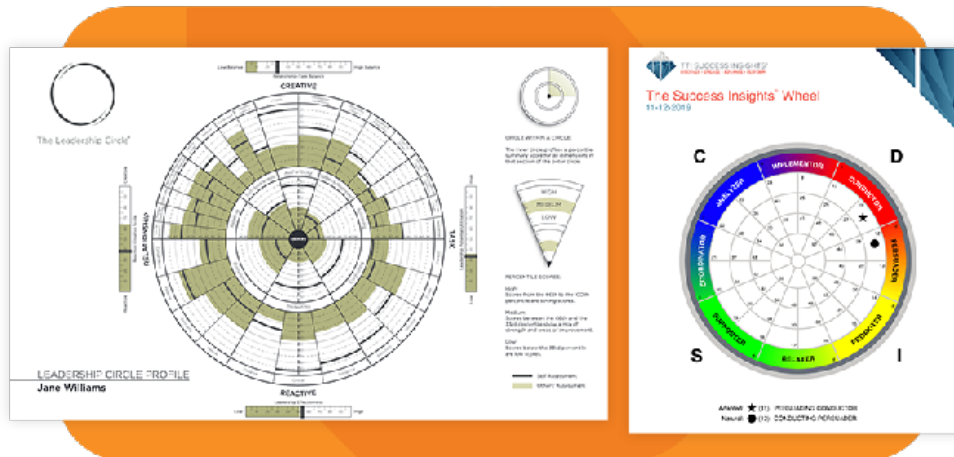
## Launch Events

We know that strong onboarding supports success. We host kick-off events for programs with multiple leaders to share details and build excitement with them. You may also decide to launch their coaching through a Welcome email privately to your leader. Launches are flexible in timing and delivery to meet your exact needs. Go live together or launch and learn at your own pace with our support throughout.

## Core Coaching Delivery

Coaching sessions can be face to face or virtual. We have been using various technologies to host virtual sessions for over 10 years now with great success.

Beyond the actual coaching sessions, our programs can also include any of the following: stakeholder interviews, 360 reports, leadership assessments, observational coaching, check ins with HR and Managers and formal development plans with action plans. These components help the leader become more self aware and provide more opportunity for feedback and alignment with you as the HR leader and their manager.



All coaching is guided by specific coaching goals that are set by each leader.

All our programs include unlimited FREE laser coaching so that your leaders can connect with their coach between sessions to share wins and challenges.

All leaders receive email session summaries following every coaching sessions to capture the highlights, action items and additional resources. In some cases, we send a relevant article, video or exercise based on the focus for the session.

Timing for sessions is entirely directed by the client's availability and desired timing within an overall framework of typically 6 to 12 months.

Flexibility is key here and we will scale our service up or down to ensure optimal fit and impact for you at a budget that meets your needs.

## Reporting

We want you to be informed and included in the coaching program with your leader. To that end, we will send you Monthly Usage Reports that track completed sessions. If multiple leaders are being coached, we provide Collective Coach Feedback to you regarding engagement, focus areas and any trends or patterns we see so you can action that information.

Once coaching sessions are complete, a Final Participant Survey is automatically sent out. We track satisfaction, value, impact, return on investment and other key metrics and show you the aggregate results. We are happy to include additional metrics at your request.

## Day to Day Management

We provide you a dedicated Client Service Manager to fully manage all the components of your coaching program, from set up to final reporting, and provide day to day support. We welcome on-going communication and collaboration with you.

## TOP COACHING TOPICS / FOCUS AREAS FOR LEADERS

At the beginning of a program every leader defines their own coaching goals or focus areas to ensure there are clearly defined goals and outcomes for the coaching. These goals are defined through their own feedback, the input of their manager and HR and possibly 360 results.

### Metrics and Reporting

We measure the success of our coaching programs consistently through monthly usage reports, mid-progress trend reports and final surveys to capture satisfaction, focus areas, value and return on investment.

While there are a range of leadership focus areas, here are the top **3 three focus areas** detailed and discussed below, based on the final survey results we collect.

**We track the following metrics via surveys and show you the aggregate results. Additional metrics will be implemented based on program design and collaboration with sponsor.**

**90%** targets in these areas for success

1. Satisfaction and value of program
2. Participants gained new insight, knowledge and/or learning
3. Explore new strategies or tools
4. Made progress in individual areas of development
5. Impact of coaching
6. ROI of program

*\*Additional metrics on request of sponsor - will collaborate with client*

## 1. Influence and Impact

Influence and impact is a key competency to build in your leaders. In fact, it is the #1 coaching focus area for more than 7 years.

As speed and complexity increases in your business and your market, leaders need to have strong influence skills to be impactful. They need to engage key stakeholders where they do not have authority, get buy-in for their ideas and solutions, inspire their teams to get them onboard new initiatives, be able to make decisions quickly, and move projects and programs forward. This influence applies to managing up, managing down and managing across in your complex and fast paced work environments.

When we coach leaders to have greater influence and impact, we address immediate obstacles and opportunities. Commonly, we support them by examining key stakeholders, uncovering motivators, addressing fears, reflecting on specific limitations and challenges, and employing influence strategies. We work through ways to build more trust, add value, gain allies and be more impactful in their presence and communications.

For example, one of our recent clients was able to influence his peers and boss to direct the departmental budget to kickstart a new worldwide practise. Another client used his influence skills to get buy in for a new business development initiative geared at the government sector. A third leader influenced the new company President resulting in the best debut event ever and she received the President's Award for her courage and approach. Other leaders get promotions, secure new clients, achieve stronger scorecard results and achieve higher employee satisfaction ratings. Influence and impact are critical to strong leadership.

## 2. Leading & Building Teams

**Leaders are only as good as their people; and results are dependent on the strength and success of the team.**

In today's world, it is the collective effort of the team that get results, not the work of one individual. It is key for leaders to lead and build their teams. This coaching focus area consistently shows up as a top coaching topic for leaders year over year.

Through coaching, we support them to build credibility with new teams, get alignment across the team, inspire, challenge, enable and recognize their people. With the on-set of Covid, leaders have the added challenge of engaging and caring for their people remotely in a virtual environment where great stress and uncertainty reigns. Through more social connections, being more transparent, being flexible about work arrangements, resetting work expectations and creating new possibilities, many leaders have become even closer to their people and creating that safety is key for success as a team.

The leaders we coach typically experience stronger bonds with their people (who will then go the extra mile for them), stronger performance, enhanced coaching skills to develop their people, and a more positive and stable environment. These results stem from increased recognition and acknowledgement of team efforts and achievements which drive stronger commitment and performance.

### 3. Leading Change & Transformation

Leaders must manage both the technical side of change and the human side of change and its impact on your people. We are living in times that demand our leaders to be flexible, innovative and creative as we deal with great change and uncertainty. Leaders must understand the levers, drivers and best approaches to navigate change and how to lead transformation successfully.

We work with leaders to effectively lead change and transformation. We address specific goals, challenges and opportunities presented by the leader. Typically, our work focuses on communication opportunities and approaches, gaining buy in and securing advocates, setting up the necessary skill building and training to enable their people, sharing wins along the way, managing stress and overwhelm, and addressing issues and resistance that comes often with change so that their people can embrace it more quickly.

We have supported many leaders and companies through large digital transformations, company re-structures, strategy changes, re-organizations and change initiatives. Our work with leaders has resulted in faster and easier adoption of change along with reduced stress and more ease for the change initiative leaders.

**Other top focus areas for our leaders are collaboration and communication, developing people, executive presence, strategic thinking, trust and personal effectiveness. We have strong experience and diverse tools and resources to support growth in all facets of leadership.**

**Over the last 9 months, leading virtually, leading through transformation and navigating uncertain times are very big priorities for leaders.**

## IS YOUR ORGANIZATION ALL OR PARTLY VIRTUAL NOW?

### We have you covered.

With the onset of Covid-19, we recognized the need to quickly support our team and our clients to lead virtually and lead through these changing and challenging times.

As a team ourselves, we came together in a series of virtual leadership “huddles” to share experiences, understand needs, and encourage and support one another. For our clients, we quickly rallied to address their challenges by creating a series of Leading Virtually Guides that we distributed to our clients and made available on our website. We also offered pro bono virtual 1:1 and group coaching sessions.

We focused on how to create structure, how to create safety and connection and how to create possibility for leaders and teams. We know it is important to help leaders and their teams get grounded and set up in a new virtual environment, so they are focused, organized and well equipped. Newly, leaders are faced with finding creative ways to stay connected with their people. We also know that people are experiencing many types of fears and anxiety – health, job loss, underperformance, caring for children and elderly, uncertainty of the future – and more.

We share approaches and guidance on how to acknowledge issues and create safety for people. We also recognize that leaders need to share hope and confidence, reset priorities, expectations and arrangements and brainstorm new strategies. This new environment demands flexibility, openness, caring and generosity. New leadership competencies are emerging as our world has changed.

Since we have been coaching leaders around the world virtually for over 10 years it has been an easy transition for us to lift our virtual services to support an even larger market of leaders. All our coaches use Microsoft TEAMS and other technologies to host 1:1 and group sessions. We can easily design and deliver a virtual coaching program for you.

Virtual coaching is and always has been our favourite coaching delivery option because it offers the same connection and quality with the added benefit of increased convenience for your people at a lower cost plus a wider choice of coaches since geography is not a travel factor. For sensitive topics, virtual coaching makes it easier for leaders to be transparent. It also limits visual distraction for a more focused session. Coaching sessions are so focused and deep in their nature that the connection remains very strong as do the results.

We have coached hundreds of leaders across our clients on the topic of leading virtually to share experiences, gain new ideas for new challenges and simply support each other with new and creative ways of leading. In cases where needs were great and budgets were slim, we subsidized 1:1 coaching to support our clients when they most needed it.

## OUR RELATIONSHIP FOCUS

### **Relationships are the new technology for success**

We recognized that many of the coaching topics from our leaders had a common thread. Leaders were looking for support to build their relationship skills. In fact, knowing how to build relationships in a complex work environment impacts everything leaders do. These relationship skills support them to have influence and impact, lead their teams, lead change and transformation and all the many other facets of their leadership. Simply said, success in the 21st century demands relationship skills to stay smart, successful and sustainable.

In response, we built our own RQ Relationship Intelligence™ Model and RQ Relationship Intelligence Diagnostic Tool™ in partnership with Dr. Salay at Queen's University. Leaders are invited to complete the tool online. Each report explores the 5 dimensions of relationship: conversation, safe haven, generosity, candor and transparency to leverage strengths and identify opportunities to strengthen relationship skills.

Openness, trust, authenticity and caring are new leadership norms. Using our RQ Relationship Intelligence™ approach we support our clients to strengthen their real life business relationships that in turn produces stronger results.

**To date, hundreds of leaders and top brand companies have used our tool and benefitted from it.**

One senior leader we worked with had such a powerful experience he rolled out the tool across the entire director level of the company, resulting in relationship action items to drive business success for every director.

Another leader was able to turn around one of his regions in less than 3 months from a legacy of underperformance through his relationship focused approach. The team felt newly understood, supported and they were willing to implement necessary system changes, processes, and fresh sales approaches to achieve new levels of success.

Another leader redefined her client approach, building deep trust, resulting in increased revenues, returning clients, new revenues and an environment where her clients will make decisions and take actions to support her.

When we have engaging and powerful conversations that create safety and build trust, and when we approach others (our teams, our bosses, our partners, our customers) with generosity, honesty, courage and transparency, we create the ideal environment to do our best work together and achieve outstanding results.

## RQ Relationship Intelligence™

*The RQ Relationship Intelligence™ framework contains five qualities that govern a leader's ability to work effectively with others. Upon completing a simple test, leaders receive a report that reveals their strengths and areas for improvement...and provides them with tools to take immediate action.*

**Conversation**  
INFLUENCE & IMPACT

- Explores awareness, engagement, purpose and communication
- Types of conversations and how to transform them
- Leading with awareness, engagement and purpose

**Safe Haven**  
SAFETY & TRUST

- Designing expectations and commitments
- Creating structure and safety
- Discovering and integrating needs and objectives

**Generosity**  
AGILITY & RESILIENCE

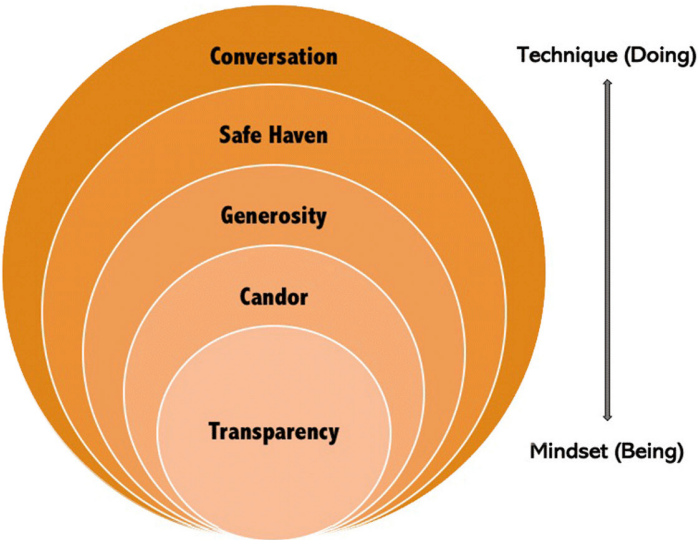
- Giving of yourself; your time, talent, and support
- Less self-interest, more collective good; finding win-wins
- Adaptability, problem-solving, patience, and empathy

**Candor**  
CLARITY & SPEED

- Honesty and courage
- Having tough conversations and productive conflict
- Cutting through politics; speed; naming the elephant

**Transparency**  
CONNECTION & LOYALTY

- Strength in vulnerability
- Owning up to mistakes and not having all the answers
- Showing your humanity



## WHAT WE BELIEVE IS IMPORTANT IN EVERY COACHING PROGRAM

We are committed to providing you a world-class coaching experience. Over the last twenty years, we have continued to innovate to provide you with the best possible coaching experience.. Here are the elements that we believe are important to consider for every coaching program:

### ✓ Strong Onboarding Support

We know that strong on-boarding impacts the success of your coaching program. We want your leaders to be able to get the most out of their coaching experience. We provide a **Getting Started Kit**, **What is Coaching Video** and **Client Questionnaire** pre-work to support your leader to be informed, focused, and excited. We even develop materials for Managers to support leaders in coaching.

Welcome to your *Leadership Development Coaching Program!*

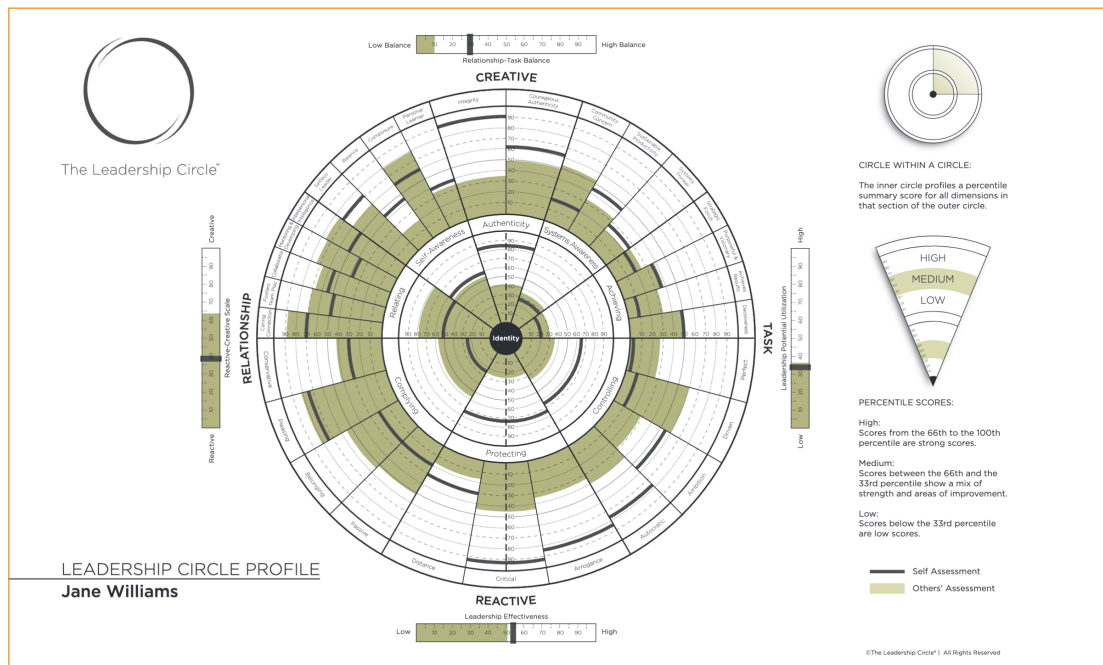


### ✓ Electronic Coach Selection

We know that choosing your own coach impacts success. Your leader will have the ability to easily select their coach of choice through our **Electronic Selection Tool**. Your leader will receive their own private and confidential link to access at least 4 coach bios in our portal. They may also choose to set up additional chemistry calls with short-listed coaches. Once they select their coach, they are automatically connected with the coach of choice. Also, our **Coach Match Guarantee** gives you confidence to know that you can change your coach if needed and simply re-set the program to ensure your leader has the right match and an amazing experience.

## ✓ 360 Tools and Discovery Reports

Self awareness for leaders supports their growth and development. We commonly integrate a **Leadership 360 Report**, **Stakeholder Interviews** and/or **Leadership Reports** will provide additional insights and focus for your leader in coaching. We also recommend our Epiphany Coaches, RQ Relationship Intelligence Report since all leaders require strong relationship skills to be effective leaders.



## ✓ Coaching Sessions

We work with you to determine the optimal session design for your leaders based on the goals, style, urgency, timing and budget for your program. There are many ways to design your program effectively. We collaborate with you to create the best program.

## ✓ Manager and HR Involvement

Manager and HR involvement supports success. We encourage **Check In Sessions** at the beginning, middle and end of the coaching program. This forum provides a way for the leader to share their experience, and get feedback from their manager and HR to support their success, at the same time, protecting the confidentiality of coaching sessions. We want to be informed and included and work beside you to best support your leaders.

## 24/7 Coaching Partnership

We view our coaching as a partnership vs. a series of formal sessions. Our programs offer complimentary **Laser Coaching**, which are unlimited 5-10 minute connects between sessions with the coach over text, phone or email to fully support your leader when they need it. We also enjoy sending your leader **Session Summaries** to share back key actions, supporting points and additional resources such as articles, exercises or videos that are relevant and supportive for the leader. We also have the opportunity to build in **Observational Coaching** sessions so that the coach can observe the leader in action. This is made very easy if you are leading in a virtual environment. Coaching is a step by step process and we aim to fully support your leader on their goals and outcomes over time.

## Reporting and Success Metrics

 Progress tracking and success metrics for coaching are important. We want the results for you and for us. We provide **Final Results Reporting** based on leader feedback at the end of every program. We have 10 metrics, including progress, value and impact that we measure, and we welcome the opportunity to customize surveys with you. We also provide **Monthly Usage Reports** so that you have visibility to the # of sessions that have been completed each month. For groups of leaders, we provide **Mid Progress Trend Reports** based collective feedback of the coaching team. We appreciate how important it is for you to measure the return on your coaching investment and understand how it had impact for your people.

## WHY DO HR LEADERS CHOOSE EPIPHANY AS THEIR STRATEGIC COACHING VENDOR OF CHOICE?

We understand the many demands on you as an HR leader and the demands to skill up your talent, give them growth opportunities, support their success in role and ready leaders for higher roles that secure the success of your organization in the long-term.

In short, we gain the trust of our long-term clients by being proactive, flexible and relationship & results focused. We work strategically with you and deliver on our promises to manage your program well and deliver strong results.

Our approach to designing and delivering world class individual and large scale coaching programs comes from 20 years of experience and innovation to deliver the best programs.

### Our clients enjoy:

- ✓ Flexible options
- ✓ Full support. Everything done for you!
- ✓ Exceptional customer service and proactive communication
- ✓ Our overall experience and expertise in coaching to make recommendations and provide creative solutions
- ✓ Strong results – 98% of leaders progress and 96% recommend us
- ✓ Expert coaching team with global presence and 10+ languages
- ✓ Proactive end-to-end program management and implementation that is transparent and gives you as much visibility as needed.
- ✓ Our long-standing client relationships with name brands such as Microsoft, VISA, HP, Garda and more.
- ✓ Strong on-boarding experience for each participant including electronic coach selection and coach match guarantee
- ✓ High level of reporting and mechanisms for feedback
- ✓ Professional and easy to work with
- ✓ Caring and commitment to you and your leaders
- ✓ Fast and streamlined systems to quickly launch any program or participant in a 24-hour turn-around time

### Our market leadership & innovations to enhance the client experience include:

- ✓ Providing each client a dedicated Client Services Manager
- ✓ Custom Electronic Coach Selection Tool & Coach-Match Guarantee
- ✓ Custom Electronic Coach Reporting Tool
- ✓ On-boarding “What is Coaching?” Video
- ✓ Coaching Community Portal
- ✓ Built and trademarked RQ Relationship Intelligence™ Model and Report
- ✓ “Roadmap To Success” co-authored book (with Deepak Chopra and Ken Blanchard)



# CASE STUDY 1

Microsoft LATAM (Latin American)  
Coaching Program

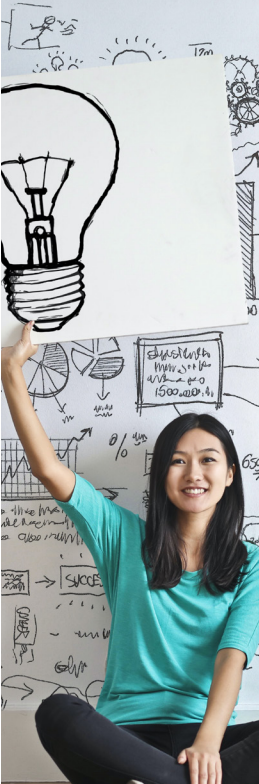
## Leading Virtually Microsoft Women@Microsoft Latam (Latin American) Coaching Program



### Our Goal

We created a coaching program to support leaders at Microsoft to navigate leading and working remotely during challenging times.

The Women@Microsoft Latin America Coaching Program was specifically designed to support leadership skills, managing teams and driving impact remotely as well as creating success and generating energy during challenging times.



### Our Solution

We partnered with Giuliana Figueiredo, Marketing and Operations Director of Caribbean and Women at Microsoft – Latam [Latin America] Lead and her team to create an agile, flexible and easy solution to implement for the large team quickly across the region.

The program started with a series of 3 Leading Virtually Group Coaching Sessions, led by our coach on MS TEAMS focused on how to create structure, safety and possibility virtually. The 1 hour sessions were a mix of reflection, discussion, storytelling and sharing best practices. All leaders, male and female, across the region attended virtual group coaching on MS TEAMS. These sessions created a needed space for leaders to share issues, challenges and solutions on leading virtually. In addition, 50 leaders were invited to participate in 1:1 virtual coaching to support a specific personal leadership topic of their choice. We collaborated all along the way to host the calls, bring relevant content and provide monthly usage reports and track success.



### Our Results

The group sessions were well attended across all three sessions with hundreds of male and female leaders actively participating and exchanging their own stories and ideas. Leaders felt supported, validated, they had a space to connect and they learned new strategies together.

In the 1:1 coaching, we had 100% satisfaction and 4.95/5 coach ratings. The top 5 topics for coaching were: personal effectiveness, leading teams, leading virtually, communication, career development and influence and impact.

## Q&A With Giuliana Figueiredo

*Marketing and Operations Director of Caribbean and Women at Microsoft –  
Latam [Latin America] Lead*

### **Q: What made you design this program?**

**A:** *Our Women at Microsoft LATAM* are focused on helping to develop networking, impact, and success of our female talent. Some topics that were identified as critical were: *leadership role models, increasing efficiency and impact on career growth, and development and work life balance*. During COVID-19 the multiple roles of our Female Talent, impacted by new and intense personal routines, exacerbated the need of support, tactics and a safety net to help them navigate through the unknown. We created the sessions for Leadership – Creating Clarity, Managing for Success and Delivering Impact in a VIRTUAL environment to foster conversations, discussion of tactics and collective learnings on how to adapt, respond and thrive in this new scenario we are in.

### **Q: What was the overall impact of the coaching program?**

**A:** Besides the positive response in terms of participation (hundreds of Female Talent attendees on each LIVE sessions plus the recorded access later) our participants were eager to connect as a community and exchange ideas. The positive feedback we received also showcased acknowledgement of the company to help it's community feel supported during the pandemic. Our leaders felt recognized on specific areas/ tasks and contexts of their personal life that could be impacting them at work. "True commitment to D&I and an ERG like Women at Microsoft, means that during challenging times like COVID-19, we make it our priority to support our leaders. With Epiphany we found a partner that was able to help create a trustworthy, candid and collaborative approach to engage with the community and think through suggestions, practices and recommendations to help each other thrive on finding balance, success and efficiency in this remote environment – from big themes to tactical recommendations"

### **Q: How did Epiphany Coaches Support Your Team?**

**A:** Epiphany was agile to develop and implement a structured approach to help us discuss, depict, and navigate the top of mind issues the Women at Microsoft LATAM community were experiencing, and had a great ability to orchestrate and instigate deeply insightful conversations within the community that resulted into practices, programs and pilots we tested and exchanged across the region.

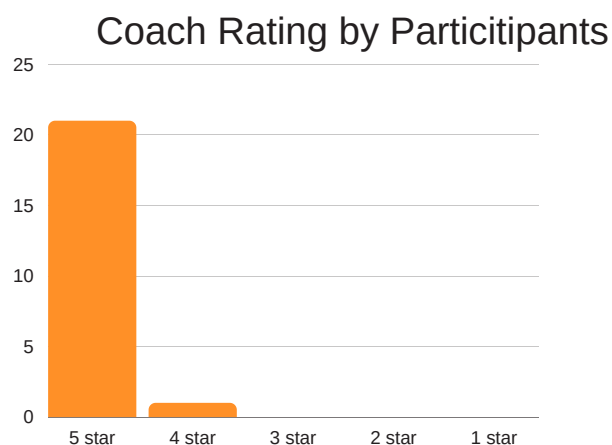
GIULIANA FIGUEIREDO, MARKETING AND OPERATIONS  
DIRECTOR OF CARIBBEAN AND WOMEN AT MICROSOFT  
- LATAM [LATIN AMERICA] LEAD

# See What Our Participants Had to Say!

“The coaching session was amazing... it provided me a really useful insight I was looking for... thank you”

“This program worked really well.  
Great to keep on this and talk about reducing gender differentiation.”

“Coaching is extremely useful”



4.95 star average rating!



Here are our results across **all** of our programs



of our clients gained  
new insight



of our clients would  
recommend coaching



value rating for North  
America workshops



value rating for  
Europe/Asia workshops



of our clients make  
progress on their goals

## About Epiphany

Epiphany Coaches is a leadership coaching company with 45 expert coaches on five continents. We believe that people have limitless potential to transform their organizations and communities. We offer an approach to coaching that is fresh, flexible and results-driven to accelerate the growth of your people and business results.



## Contact Us

[request@epiphanycoaches.com](mailto:request@epiphanycoaches.com)  
Tel: 905-572-6224  
Toll free: 1-866-806-1798

Contact Info





# CASE STUDY2

**Leadership Development Program  
Securing Sustainability and Growth  
in a Large Milling Company**

## Leadership Development Program Securing Sustainability and Growth in a Large Milling Company



### Our Goal

We were approached by a large milling company in Canada. The client was keen to provide a Leadership Development Coaching Program to develop the leadership skills of their second level leaders to support future growth and sustainability. They wanted a solution that would be highly interactive, relevant and practical for their people.



### Our Solution

We had four elements to our solution. Firstly, we had sessions with the executive team at the beginning, middle and end of the program to get aligned, discuss progress and priorities and evaluate success. We launched our integrated program for the cohort of 12 Level 2 leaders in the organization. It included 9 interactive monthly half-day coaching workshops with monthly 1:1 coaching calls, along with post workshop resources and unlimited laser calls between sessions. Each workshop had a specific focus such as: “developing your people”; whereas the 1:1 coaching sessions and laser calls allowed the clients to address personal areas of development with their coach. We collaborated with our client along the way to bring in highly relevant examples and topics and we shared the progress and results through monthly usage reports, workshop evaluations and formal reports.



### Our Results

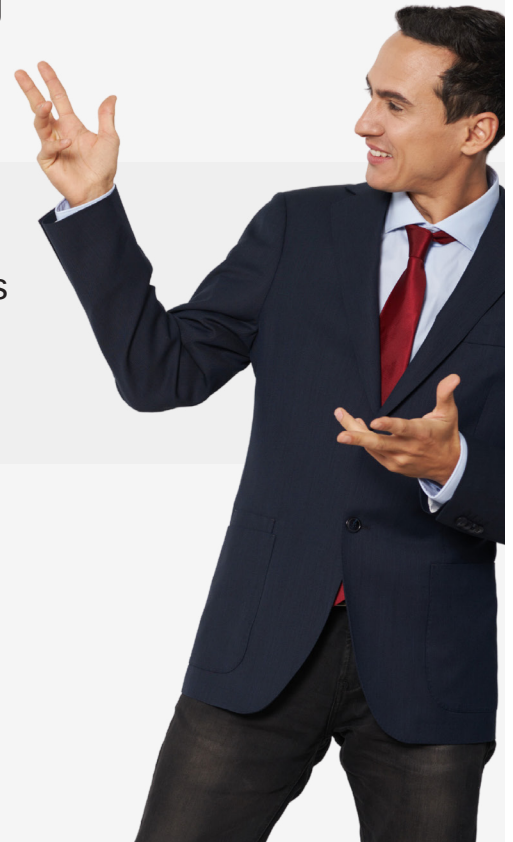
The leadership development program was very successful. In our final survey, 100% of the leaders reported they were satisfied with the program. Beyond satisfaction, all participants reported that our coaching work also supported them to gain new insight and learning, and to explore new strategies and tools for their leadership. 100% of the leaders would also recommend continuing to offer coaching. We were also pleased to learn that coaching had a significant impact for all participants across these key areas: influence and impact, communication skills, leading people, change management, relationship building and satisfaction with their own organization.

# See What Our Clients Had to Say!

"Thank you to the Epiphany Team for an excellent experience that will benefit me in the short and long term. Was an absolute pleasure."

"I think the team at Epiphany is excellent. The skills and knowledge I have gained through their sessions and 1:1 coaching is invaluable to my leadership development."

"I never knew how much of a positive impact that coaching could have on my ability to lead. My confidence as a leader has increased exponentially and I now have the tools to be the kind of leader that I have always wanted to be!"



Here are our results across **all** of our programs



of our clients gained  
new insight



of our clients would  
recommend coaching



value rating for North  
America workshops



value rating for  
Europe/Asia workshops



of our clients make  
progress on their goals

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Toll free: 1-866-806-1798

Contact Info



## SETTING UP THE ENGAGEMENT

**We make it fast and easy to launch a new coaching program with our streamlined system and process.**

- ✓ Simply fill out our Coach Request Form to detail the coaching request.
- ✓ We'll set up a brief call if needed to verify the details or dig deeper.
- ✓ We'll provide formal proposals and SOW's if needed.
- ✓ We'll prepare and send you all of the custom onboarding and then launch your coaching participant on the preferred date.

## HOW OUR TEAM HELPS – OUR COACHING TEAM

We have a world-class, **global team of 45+ coaches from five continents** to meet your needs across various time zones and cultures. Together, we have delivered coaching to thousands of leaders in 10 languages across over 70 countries.

Our coaching team is truly a team, not a network. As a relationship-based company, we know, we value, and we care about our coaches. Most of our coaches have been coaching with us for over 10 years. They tell us that they love the calibre of leaders they get to work with, the acknowledgement and support we show them, and the opportunity to collaborate as a community.

Every year, we have an annual process of asking each coach to share their optimal contribution for the year. We believe in mapping the focus, capacity, excitement and fit for both them and you to create the best results.

Beyond actual coaching, we connect in formal community calls, events and ad-hoc across email and MS TEAMS to collaborate and share experiences, trends, tools and support one another to bring the best coaching solutions to your leaders.

As an example, we came together as a team to deliver Cirque De Soleil's experiential coaching exercises to expand perspective and bias with leaders across a two day business transformation event, Gennex, held in Zurich, Switzerland that was founded by one of our coaches, Christian Frei.

Last year, we met for our own two day retreat at Niagara on the Lake in Canada to connect and collaborate on new coaching ideas and hot topics for leaders so that we continue to bring you relevant and innovative solutions.

### OUR COACH MATCH GUARANTEE

We guarantee you a strong coach connection between the coach and your leader. Here's how! Your leaders will choose their own coach, with at least 4 coach choices, through our electronic coach selection tool. They may also book chemistry calls with potential coaches to make a final selection. And, for any reason, if they do not feel connected to the coach they chose, even after one or two sessions, we will offer them the opportunity to select a new coach with no conditions and reset their program at no extra charge to you.

## OUR COACHING STANDARDS OF EXCELLENCE

We are dedicated to a consistently high standard of coaching excellence as a coaching team for all programs. Here are our five elements of excellence that every coach on our team formally agrees to consistently deliver for you:

### 1. Quality of Coaching

We bring high value to your leaders in every coaching session through our experience, energy, optimism and skill, aiming to achieve coach ratings of “excellent”. This is accomplished by selecting the right coaches to join our team through a strict vetting process. We ensure our hand selected coaches are a great “fit” for our org, share our values, and have the coaching certifications, skills, expertise and past experience to meet your people exactly where they’re at.

### 2. 100% Session Completion Rates

We honor the planned sessions and program timing set with you. While your leaders own their own coaching experience, each coach is responsible to manage timing to deliver 100% of the sessions within the timeframe defined by you for the program. Our coaches are flexible with session timing and will work around the clock to ensure a program is completed and the identified desired outcomes of the coaching program are achieved.

### 3. Timely Reporting

We offer a number of reporting touchpoints to keep you looped in throughout a coaching program. To ensure accurate and regular reporting, our coaches use our custom online portal to report completed coaching sessions and session dates, immediately following each coaching session. These reports will show up in your inbox every month in the form of a high-level engagement report that keeps a collective track record of any and all ongoing and past coaching programs.

### 4. Participation in Briefings and Check Ins

We value the strategic context and background of your program so that we can do our best work for you. Our coaches attend briefing calls (or watch the recording) to participate in the coaching engagement so that they are informed of the program background, audience, climate and program framework, to maximize the coaching opportunity. Coaches also participate in mid-program calls to share trend feedback that, in turn we share with you. Beyond the monthly reports this adds yet another level of transparency and insight into the effectiveness of our coaching programs.

### 5. Tech Savvy

We understand the importance of connecting easily in this virtual world. We have been offering virtual coaching for over 10 years now. Every coach is equipped with a Microsoft O365 license so that they can easily communicate and book sessions with leaders as well as host virtual coaching sessions on MS TEAMS or any other on-line platform of your choice. All of our face to face service offerings including coaching and leadership development programs can be also be delivered virtually.

## OUR COACH RECRUITING PRACTISE

We have a formal and uncompromising approach for recruiting coaches to deliver the world-class coaching we promise you. It is a client-driven approach. Coaching training and experience, business experience, leadership experience and life experience are all evaluated to ensure the coach's fit to navigate the issues and conditions that your leaders face today. Experience, expertise and values must be aligned.

Every coach has a series of meetings including a live coaching session with our founder to be considered and ensure the quality and fit are there for you beyond their on-paper credentials.



- ✓ All of our coaches hold professional coaching designations
- ✓ Many of our coaches hold multiple coach training designations and certifications such as Team or Systems Coaching, Somatic Coaching, Neuroscience, Positive Psychology and Health Coaching
- ✓ Many of our coaches hold a postsecondary degree, including several MA's, MBA's, and Ph. D's. For example, several of our coaches are university professors.
- ✓ Our coaches typically have 10-25 years of corporate experience. Many of our coaches have held senior sales/marketing, and C-Level positions.
- ✓ All of our coaches have 5-25 years of deep executive coaching experience.
- ✓ Collectively, our coaches speak 10+ languages, and cover every time zone so we can effectively provide top quality coaching around the globe.

# Our Coaches

## North America



Julie Bégin  
Canada



Heather Clarke  
Canada



Katie Cook  
Canada



Rosa Edinga  
Canada



Janet Froot  
Canada



Simon Geoghegan  
Canada



Jodi Hosking  
Canada



Daniel Renaud  
Canada



Cheryl Lipman  
Canada



Fernando Lopez  
Canada



Stacey Olson  
Canada



Rachel Weinstein  
Canada



Audrey Tremblay  
Canada



Wendy Turner-Larsen  
Canada



Salima Valji  
Canada



Heidi Kraft  
USA



Lynnea Brinkerhoff  
USA



Janet Williams Hepler  
USA



Shannon Jones  
USA



Susan Sadler  
USA



Beth Marchand  
USA



Nicholas Masek  
USA



Patricia Quiddington  
USA



Peter Jerkewitz  
USA



Rob Schwartz  
USA

## Asia-Pacific



Aggie Aitken  
Australia



Maggie Lawlor  
Australia



Fran Tiver  
Australia



Keiko Shinohara  
Hong Kong



Sangeeta Mathur  
India



Sanjay Rishi  
India



Noriko Sato  
Japan



Malgorzata Grabarczyk  
Singapore



Irina Miu  
Singapore



Danny Toh  
Singapore



Jung Won Kim  
South Korea



Wonsup Park  
South Korea



U Soon Suh  
South Korea

## Europe, Africa & Middle East



Evelyn Simon  
Germany



Gavin Shaskolsky  
Israel



Christian Frei  
Switzerland



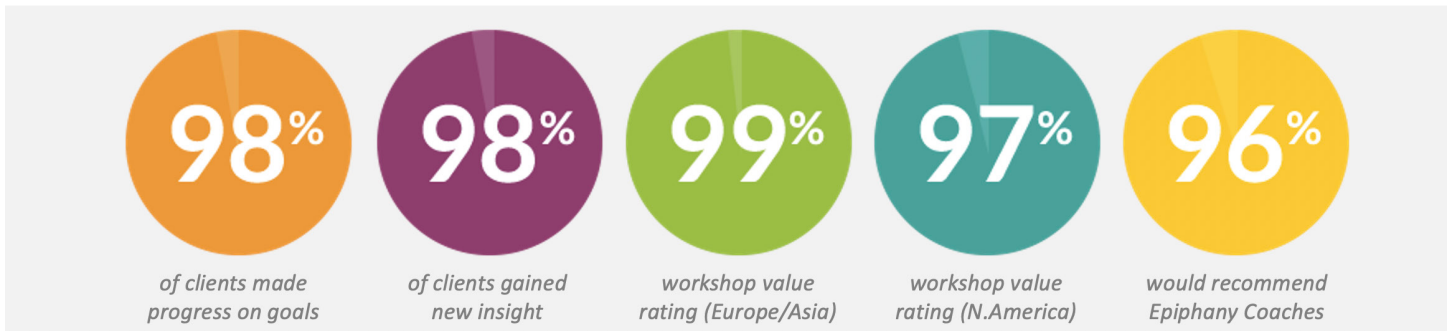
Simon Bold  
South Africa



Jane Anglin  
UK

## General Results

**We track success on business objectives, engagement, and behavioral change in all our coaching programs.**



*Results tracked across 100+ large-scale programs with clients in 70 countries.*

## Testimonials



**Helena Gilman**  
Director, Marketing Excellence

**"I've worked with agencies, consultants, and learning partners throughout Europe, Middle East and U.S., and you guys are simply the best!"**



**Cynthia Lee-Mai**  
Director, API Talent & Organization Performance

**"It is a joy to work with a responsive and responsible team like yours. Your belief in delivering true value and authenticity helps our participants to create a difference in their leadership journey."**

## OUR STORY

Hi! I'm Cheryl Breukelman, CEO of Epiphany Coaches Inc.

Here's a short story of our exciting and continuous journey over the last 20 years. Epiphany was born from experiences and beliefs that people are the center of strong business results. People are capable of incredible things when they are developed and supported to be brave and strong and skilled.

In the 90's, working at Microsoft, I was surrounded by smart, inspired and committed people. It was an environment of high trust and high growth. I witnessed how developing and supporting people created magical outcomes and results. And we won the worldwide President's Award over and over again. Outside my customer service, marketing and sales roles, I led national change management initiatives and worked directly with the senior leadership team in my twenties, where I replaced my fear with skill. And our success landed me a millionaire by age 30 which gave me the opportunity to take my career forward in new directions with options and confidence.



I wanted to create a company to model and develop these positive conditions and partner with organizations to challenge and champion their leaders to be their best for strong results.

Today, we are a global coaching company with a long and strong track record of coaching leaders around the world. We work across all sectors, largely in technology, health and finance.

Our gifted team has over 50 people including 45 coaches in North America, Europe, Africa, Asia and Australia and 7 internal team members who support client service, operations, sales and marketing. We love our work developing leaders and we are guided by our values of being real, generosity, learning and joy.

We have coached thousands of leaders in over 70 countries and over 100 large scale coaching programs. This year alone, we have coached over 1000 leaders in over 30 separate organizations across 130 coaching engagements including brand name clients such as VISA, HP, Microsoft, Garda and more. This year, we were awarded Top 10 Coaching Companies in North America for 2020 by Manage HR Magazine and 2020 Best Global Leadership Coaching Company by Corporate Vision.

We have helped leaders to successfully navigate large scale change and digital transformation. We have coached leaders to better lead their teams to stronger results, to lead virtually, to develop their relationship skills, to overcome limiting mindsets, to level up, to be courageous, to be better communicators, to grow their influence and be more intentional and effective leaders. Our results are 98% of leaders that work with us progress and 96% recommend us.

# HOW TO WORK WITH US

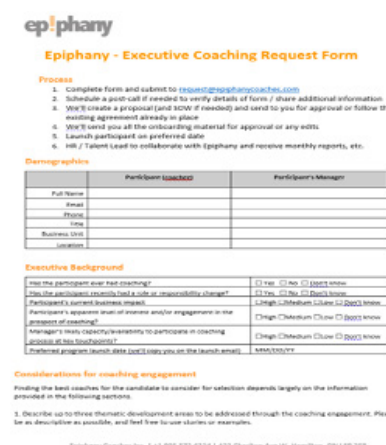
Email us at [request@epiphanycoaches.com](mailto:request@epiphanycoaches.com)

We will set up a call together to explore your needs and determine if we are a good fit together. You can expect a quick response from us.

## Working Together

Working with us is fast, flexible and easy.

It's as simple as completing our one-page Coach Request Form and asking us to manage the rest for you.



The image shows a screenshot of the 'Epiphany - Executive Coaching Request Form'. The form is titled 'epiphany Epiphany - Executive Coaching Request Form'. It includes a 'Process' section with 6 steps: 1. Complete form and submit to request@epiphanycoaches.com, 2. Schedule a phone call if needed to verify details of form / share additional information, 3. You'll create a proposal (and know if needed) and send to you for approval or follow the existing agreement already in place, 4. You'll send you all the onboarding material for approval or any edits, 5. Launch participant on preferred date, 6. We'll support you to collaborate with Epiphany and receive monthly reports, etc. Below this is a 'Demographics' section with a table for 'Participant Coach/CEO' and 'Participant's Manager'. The table has columns for Full Name, Email, Phone, Line, and Business Unit. Below the table is an 'Executive Background' section with several questions and checkboxes for 'Yes', 'No', 'Don't know', and 'Prefer not to answer'. The questions are: 'Has the participant ever had coaching?', 'Has the participant recently had a role or responsibility change?', 'Participant's current business impact', 'Participant's apparent level of interest and/or engagement in the prospect of coaching', 'Manager's likely capacity/willingness to participate in coaching process at his/her company?', and 'Preferred program launch date (and if you are on the launch email)'. At the bottom is a 'Considerations for coaching engagement' section with a note about finding the best coaches and a section for describing up to three thematic development areas to be addressed through the coaching engagement.

**Process**

1. Complete form and submit to [request@epiphanycoaches.com](mailto:request@epiphanycoaches.com)
2. Schedule a phone call if needed to verify details of form / share additional information
3. You'll create a proposal (and know if needed) and send to you for approval or follow the existing agreement already in place
4. You'll send you all the onboarding material for approval or any edits
5. Launch participant on preferred date
6. We'll support you to collaborate with Epiphany and receive monthly reports, etc.

**Demographics**

|               | Participant Coach/CEO | Participant's Manager |
|---------------|-----------------------|-----------------------|
| Full Name     |                       |                       |
| Email         |                       |                       |
| Phone         |                       |                       |
| Line          |                       |                       |
| Business Unit |                       |                       |

**Executive Background**

Has the participant ever had coaching? ☐ Yes ☐ No ☐ Don't know

Has the participant recently had a role or responsibility change? ☐ Yes ☐ No ☐ Don't know

Participant's current business impact ☐ High ☐ Medium ☐ Low ☐ Don't know

Participant's apparent level of interest and/or engagement in the prospect of coaching? ☐ High ☐ Medium ☐ Low ☐ Don't know

Manager's likely capacity/willingness to participate in coaching process at his/her company? ☐ High ☐ Medium ☐ Low ☐ Don't know

Preferred program launch date (and if you are on the launch email)

**Considerations for coaching engagement**

Finding the best coaches for the candidate to consider for selection depends largely on the information provided in the following sections.

3. Describe up to three thematic development areas to be addressed through the coaching engagement. Please be as descriptive as possible, and feel free to use stories or examples.

Epiphany Coaches Inc. | P: 905.572.4224 | 422 Charlton Ave W, Hamilton, ON L8P 2G8

Working with us is fast, flexible and easy.

Or you can be involved every step of the way as we set up and manage your program to success. **You choose.** We will collaborate on a program, timing and deliverables and share proactively with and for you.

Let us help you secure and grow your top talent to avoid losing them and having a succession gap.

Let us ensure the success of your key leaders so they do not fail in these changing and trying times.

Let us work with your leaders to raise their game to meet the demands of your business and its success.