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CASE STUDIES ON THE EFFECTIVENESS OF EXECUTIVE COACHING

BY JEANINE GAJEWSKI

Indicates Wayne Caskey's clients

7 of 18 executives are Wayne's clients

Tiger Woods has a coach to keep him on the top of his game, so why shouldn't a CEO? But instead of perfecting their golf swings, CEOs employ coaches to help them hone their leadership skills, identify areas of improvement and provide an outside perspective on their organizations. These CEOs explain what led them to chose executive coaching, how they defined their return on investment, and what advice they have for other CEOs who are looking to decide if hiring a coach is the right path for their personal and business growth.

Bill Milligan, CFO, HPTi



Why Coaching? My CEO suggested that the executive team do some small-group coaching. I'll admit, I was kind of reluctant. It sounded like some sort of voodoo science, but I'm always willing to give anything a try. After a few months, we had the option to continue individually, and it was working for me so I decided to keep going.

Return on Investment: We had a lot of type A people who were used to doing things their way, and what I came to realize through coaching was that sometimes you upset things along the way and don't realize it. I had stepped on some toes. The light bulb went on that I should keep some of the things I was doing that were making me successful, but the coach helped me identify those things that weren't helping me, that were getting in the way.

Advice: I went in pretty skeptical, but if you go in there with your arms folded, nothing is going to happen. And let's face it – the coach has to be someone who is strong enough to argue with you. I didn't get to where I am by being a shrinking violet.

Knox Singleton, CEO, Inova Health System

Why Coaching? I had used a coach in the development of some of my direct reports, and I was so impressed by the results that it occurred to me that I could benefit from having a dispassionate external assessment of how well I was doing.

Return on Investment: I view coaching the way you would change your oil or do preventive maintenance on your car. As far as you know, the car is doing great, but when you have a mechanic look at all those moving parts, they can alert you to things that are indicative of something serious and you can intervene early. Coaching is not as expensive as fixing major problems because I'm regularly and systematically looking at my leadership performance. I put it under the category of "important but not urgent." Like most things in that category, it is practically impossible to quantitatively measure the ROI, but they are essential disciplines for successful organizations.

Advice: My advice would be to think of oneself as a professional athlete or per-

former. Every performer who gets maximum performance has a coach. Objective assessment of how you are playing, and coaching on how to perform better, are essential to reaching your full potential.

WC Charles Sawyer, president and CEO, the Sawyer Group, Inc.



Why Coaching? My business grew very rapidly, and at that same time, I was serving as a caretaker for my my dad, who had cancer. I wanted a coach to help me with balancing my life and growing the organization. Before, I was just working my tail off, not sure if I was making money or where I was heading.

Return on Investment: My coach has helped me both personally and in business. In the last five years, I have tripled the size of my business – tripled profits, tripled income. I have always been goal oriented, but by visiting with someone in person every week or two weeks, instead of visiting on the phone or a workshop, it actually had follow through.

Advice: A lot of CEOs have a problem with taking advice. They try to keep things tight to the chest and not let people in on what they are doing. Sometimes they have to back off and be more of a student instead of always being the teacher.

WC Dennis Graul, president, Graul's Markets



Why Coaching? We discovered that the top management didn't really have anyone who was creating a level of accountability. It was easy to keep my store manager on track with goals, but no one was looking at me and saying, "Hey, Dennis, what about your goals?"

Return on Investment: A lot of the coaching process was evaluating my job and asking, "Am I spending time on things that don't produce value for the company?" Once you clarify, the accountability follows. There are definitely remnants of his coaching in how I manage my time, and the devil is in the details. He didn't change the world, but he cleared up some loose ends that allowed me to be more effective.

Advice: Coaching is time consuming. I found that for effective coaching sessions, you couldn't just show up; you had to do some pre-work. Then after the coaching, you came away with a lot of to-do's. Also, it is sometimes hard to figure out how to wean away from the coaching because at some point you need to build those habits into your lifestyle.

WC Rod Smith, former CEO, U.S. Credit and Collections

Why Coaching? I was running a family business started by my father, and in December of 1999, I told my father that I was going to move on and do other things. Two weeks later, he drowned in an accident overseas. At the time, my mother was going through a very serious illness that was slowly taking her life. Also, when

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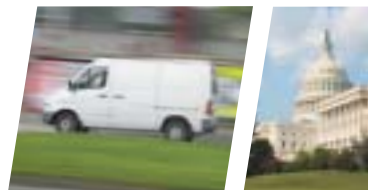
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there is a power vacancy, the sharks come out, and it's tricky when you are in grief, you are vulnerable. At that point, I called a friend and mentor because I needed to be clear minded to run the business, but I wasn't clear minded. Given the circumstances, she directed me to a coach who she felt would be particularly good for me.

Return on Investment: In some ways, my coach had a capacity to give me room to grieve, which is not necessarily executive coaching, but call it what you will. At one point, I was still hesitating on implementing my plan of leaving my business, and through talking with my coach, I got really clear that after taking care of the business, actually making it more profitable and a healthier business, that I wanted to leave. I felt this freedom and this joy, and my coach, in many ways, helped facilitate that process.

Elaine Rogers, president, USO Metro DC



Why Coaching? I knew I had some issues within the organization. I needed someone who I could be very honest with and know it wouldn't get back to anyone. I believe in having someone else come in from time to time to evaluate your organization, as well. Sometimes you are just too close to things to see issues.

Return on Investment: I needed to get my board to understand why I was doing it, so I set out my goals to my board first. The coach's perspective also helped me to verify the fact that what I wanted to do was the right thing to do for the organization. It was actually pretty easy to look at the whole coaching process and be able to show to my chairman what I did and what came out of it.

Advice: When I went into this process, I had a mindset that I would not take anything personally. I'm not saying I took all the advice that was given to me, but at least I took the criticism.

Felice Wagner, CEO, Sugarcrest



Why Coaching? I was at a crossroads and had gone as far as I could go in the company I was in, and was trying to figure out what to do next. In that kind of position, you don't really have a whole lot of people who you can talk to. It is very hard not to show your hand, and once you become a leader, it is even more isolating.

Return on Investment: The coach helped me to identify goals and visualize what it all looks like five years from now, 10 years from now, and we worked backwards from there. She coached me to start my own company and has continued to be a great asset in getting clarity on what I am going to do.

Advice: I think coaching is not for you if you are not willing to implement anything. You have to be willing to engage in the process. The coach is not going to solve your problems for you.

George Schindler, president, CGI Federal



Why Coaching? My company was purchased and I was asked to take on a significantly bigger role heading up a business unit in a new geography. I thought, "I can do this, but maybe this wouldn't be a bad time to reach out for help."

Return on Investment: After the first meeting, I really questioned its value. I spent a couple weeks going over what I had to invest and what I was going to get out of it, and realized the ledger was much higher on what I was to get out of it. If it were all about me, I probably would have had a harder time justifying the expense. But I approached it as an opportunity to create a higher-performing team, and as a leader, I needed coaching to make sure it occurred. My ROI increased because I was open to the feedback and willing to create positive change – for me and the organization. I think it's what enabled me

to take on my current position of president of CGI Federal.

Advice: First, you have to be in sync with the coach. There has to be trust. Then both parties need to call each other out when something is going a little off track for either party.

WC George W. McManus, president, J.J. McDonnell & Co., Inc.

Why Coaching? I was closer to a micro manager in my management style, so I hoped coaching would teach me to back off a little bit and become a better leader.

Return on Investment: I needed to draw boundaries, which touched some sensitive bones with those who work around me because now I can't say yes to everything. It is easy to be coached, but it's hard to implement and practice. The job starts when the coach leaves.

Advice: Outline what your goals are and then explore your options of various coaches. Narrow your focus so that in the first session you can see if there will be results.

WC Jason Copeland, president, Industrial Diagnostics



Why Coaching? I started my company a bit on a whim. I was 28 when I started my business, so I was looking for some wisdom and to have an outsider's opinion on the difficult decisions I was making. I don't have a business partner, so all these decisions rested on me.

Return on Investment: At a certain point, I outgrew my natural set of peers, so bouncing ideas off of them was becoming less and less valuable. Coaching allowed me to gain an unbiased perspective and help shed some light on the decisions I was making.

sions I was making.

Advice: If you already have a great set of people that can give you an outside perspective, then that's all you need. If you are looking for wisdom like I was, then find a coach with a lot of previous executive experience.

Julie Chapman, president, NPower Greater DC Region



Why Coaching? I had some things that I has grappled with a couple of times and it seemed it would be helpful to get some assistance at something that was clearly hard for me. I had known several folks who had worked with coaches, and it seemed that a coach was helpful in growing beyond whatever your inherent limitations might be.

Return on Investment: I was able to go to a whole new level in my career as a result of the coaching. I gained a lot of confidence and I was more willing to take risks. I went on to be

the founder of a start-up and then to my current role. Did coaching enable me to do that? I don't know, but it certainly helped.

Advice: I think being a leader can be a challenging job, especially in a growth environment. There is nothing wrong with getting help.

WC Luis Borunda, president and CEO, U.S. Hispanic Youth Entrepreneur Education



Why Coaching? I looked to coaching to help me catch blind spots and to understand things about myself that I could look at and applaud, and other areas where I could change.

Return on Investment: I began to see some differences in my personal life very quickly, actually. They say "results may vary," but it really helped me see myself in a different light. One of the things we worked on right out of the gate was – it may sound strange – but I had this aversion to using tools like a day planner and I hated to write things down and kept it all in my head. My coach said, "Let's commit to making this particular change." You should see my calendar today!

Advice: Everyone needs to have a "why" prior to going into a process like this

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because you do have to be ready to make some changes in your life and your coach won't do it for you. They will help keep you accountable, and candidly, accountability is not something we relish in our lives, but it is part of the growth process.

Sally Herbert, president, GS1-GDSN, Inc.



Why Coaching? From a woman's perspective, I think there have been times in my last two or three posts where I knew I was up against an issue or situation where I wondered whether my being a woman wasn't a factor. And as we grow over the years, having a check up to get a benchmark is very important.

Return on Investment: My coach has helped me to put the gender aside, do what is right, be strong, go forward and not hold back. I've found that coaching programs are generally goal oriented and no one is going to set those goals for you. Coaching is expensive, but I have never questioned the ROI on it – the ROI is there.

Advice: Growth is continual. I know more now than I did in my 20s and 30s, and in 10 years, I'll know more, but still have more to learn. I think hiring a coach shouldn't be viewed as a sign of weakness. It helps you keep on track and keep focus on the things that are truly important.

Jeffrey S. Olszewski, director of finance and administration,



Accrediting Council for Independent Colleges and Schools

Why Coaching? I was wearing too many hats and had a feeling of being overwhelmed and wondering if I was doing anything well.

Return on Investment: Within my career, I haven't had any mentoring from anyone I've worked for. People are busy and isolate themselves. I was hungry for some help in dealing with my problems, and coaching gave me some perspective. I needed that for my personal growth.

Advice: If you are not open to constructive criticism, or if you have a big ego, you won't be able to deal with a coach. Be open to what they say.

Steve Gilfus, former co-founder, Blackboard



Why Coaching? I probably had 15 or 20 roles and titles within Blackboard as we grew the company. When we started a new division, I was the guy who was put in that spot, and then relinquished it. I thought it would be good to engage a coach and figure out, based on what I was good and bad at, what were the types of things I might need to do to improve.

Return on Investment: My coach helped me understand that I had a unique ability to be an entrepreneur. I was doing it within the company, but couldn't say I had the confidence to

do it myself. My activities with the coach unlocked the serial entrepreneur in me, and I left Blackboard in January and have gone on to found two other companies, Event Innovation and UpsideOver.com.

Advice: Participate with an open mind. Nothing is good or bad; it is simply an opportunity to grow as an individual so you can ultimately do more and succeed more in your life.

WC Susan Major, managing partner and design director, The Hestia Group

Why Coaching? When I started my business in 2002, I had a lot of business and leadership questions and I wanted someone with experience who I could talk to about it.

Return on Investment: Coaching helps you realize the things that are bothering you. Once you get it out on the table, you realize that it is not just an annoyance but impeding your progress, and you are driven to change. When people get to that leadership role, it's often what they've always wanted – I've worked all my life to get here, and now what? Coaching helps to set a new threshold after a big accomplishment to know what the next big thing is.

Advice: You have to realize that you don't know exactly what will come out of the coaching experience. It is not a transactional deal, like an ATM. It is holding the mirror up to you and you may see something you didn't think you would see. It is worthwhile to have someone help you formulate bigger questions than you have asked yourself.

Tim Zilke, president and CEO, Automotive Service Excellence



Why Coaching? I began with ASE in 1991 as the CFO, and then I became COO, as well. As the CEO moved toward retirement, they had a succession plan in place that had me moving from the COO to the CEO position. As this transition plan unfolded, I began talking with a coach, and we talked about how to transition from an internal, finance-related role to one that is more strategic.

Return on Investment: I knew what I wanted to achieve out of the process and the areas I needed to work on. The coach injected a lot of other areas, such as the fact that I had to think about perception from the board and the shifting role in how they worked with me.

Advice: I think there is absolute value in coaching, both for someone in the situation I was in, and also for someone currently in a CEO role. Coaches quite often can provide great insight into personal growth and growth that can help an organization.

Sheila Stampfli, CEO, Courtesy Associates



Why Coaching? Someone on my staff is married to a person who has a coach. She said I should really try it. I said, "No, no. I don't need that." But she kept after me, so I decided to meet the coach. I thought the coach was bright and interesting and someone I have things in common with and who I could learn something from. That was eight years ago.

Return on Investment: I judge the ROI on whether I am doing a better job of leading the team, of allowing employees to realize their full potential. I was used to doing it alone. My coach helped me to ask, "Who else could help with this?" I think I gained a sense of confidence in dealing with difficult situations and a realization of what I bring to the table.

Advice: Every coach is not right for every person. My coach is factual and tough. You can't wiggle out of things. If I didn't have a tough coach, I might run over them.



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coach's corner

EXECUTIVE COACHES WEIGH IN ON WHAT TO LOOK FOR IN A COACH

BY JEANINE GAJEWSKI

With so many varieties of coaches out there – running the gamut from life coaches to business consultants all under the umbrella of “executive” coach – it is difficult to avoid comparing apples to oranges. Worse still, because coaching is a relatively young and unregulated profession, it can be tricky at first blush to distinguish bona fide coaches from hucksters hanging a shingle.

SmartCEO asked a dozen executive coaches to share their perspective on what to look for when choosing a coach, red flags to avoid and steps you can take to ensure you are getting the most return for your investment.

AVOID THE FLAKES

The greatest danger to my profession is the people in my profession. There are a lot of flakes out there. You have therapists who haven't made it in therapy, academics who haven't made it in academics. Unless the coach really can relate to a business environment and be ahead of their clients in terms of understanding their pain, the coach won't provide any value.

Tim Allard, CEO, Odyssey Inc.



THE SPOTLIGHT

If the company as an orchestra, and the CEO is the conductor, the coach's job is to be the spotlight, to illuminate what is needed and to highlight the path forward. The CEO is the one directing. Where damage is done is when coaches think their role is something other than the spotlight.

Suzi Pomerantz, CEO, Innovative Leadership International, LLC

GOING NATIVE

As a coach, you are in the organization, but not of the organization. Sometimes coaches can go native – they get caught up in the day-to-day intrigue that they lose their perspective. When they start advocating for certain people or become the angle they can work to get to the CEO, the coach has lost their value.

Scott Eblin, president, The Eblin Group



READY AND WILLING

If coaching is right for you is a question of your readiness and willingness. Readiness is a function of timing. It may be that a CEO is in the middle of a major project or has a distracting personal issue. I laser in on the willingness of the CEO to invest and commit. Those who are willing to do the work get the best results.

Jeffrey Parks, founder, Performance Breakthroughs Inc.

WHEN IT'S WORKING

When do you know if the coaching is working? I am listening for the coachee to say something like, “I couldn't wait to talk to you.” Then you know that executive has found someone they trust and value.

Ken Tucker, founder, Ken Tucker and Associates, LLC



THE RIGHT MODEL

The coach wants to get an understanding of the type of CEO you are. Are you a hard-charger, entrepreneurial, bureaucratic, a systems thinker? They are looking for a potential good fit between the coaching model and the person being coached. Once there is an acceptance of the type of coaching you are looking for, then it comes down to a fit between the coach and coachee—are they on the same level intellectually, personally?

David Miles, CEO, Miles LeHane Companies

FREE TRIAL

The best advice is to do a trial session with the coach. You'll know something about the content, the relationship, whether personalities click. Also check out other references, but a trial session is the best way to know if there is a match.

Joan Sugerman, president, Gemini Executive Coaching



STRAIGHT TALK

You should get the sense that the coach is someone who can push you, not just give the answer you want, but straight talk. It works because you have someone who will tell you to quit kidding yourself. You don't want another yes man.

Jennifer Stillings, president, WorldAwake, LLC

COLLUDING WITH THE STATUS QUO

Choose a coach who tells you the truth. People don't like to tell the CEO bad news that might bring about a negative reaction. Consequently, CEOs are cut off from valuable information. Coaches should be candid – not brutal, but candid. CEOs need a coach who is not intimidated by authority. They need someone who is not afraid of being fired. Coaches shouldn't collude with the status quo.

David Lassiter, CEO, The Leadership Advantage



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LONG-TERM DEPENDENCY

Coaching can become a crutch when your coach is providing answers. Even if the answers are good ones, what incentive do you have to answer those questions yourself? Coaching shouldn't be a permanent function, but there are some coaches who are looking to build a long-term dependency, to be perfectly honest. If it evolves, that's great. If not, it's time to part ways.

Larry Robertson, principal and founder, Lighthouse Consulting



A STRATEGIC INVESTMENT

There isn't going to be a couch to lay on when you get in here. Coaching is strictly business-focused. A good coach will come up with business plan for the successful coaching run for that participant. Coaching can be a strategic investment in your personal learning and development. It's like anything else you invest in. You invest in a new computer system because it is going to produce for you; you invest in a coach because the coaching relationship is going to produce for you.

C. Michael Ferraro, president and CEO, Training Solutions, Inc.

THE QUESTIONS

The coach's job is to ask questions that will move the person from where they are to somewhere else. I don't consult. I don't advise. I have opinions but I don't offer them unless I'm asked, and even then I'm reluctant. I see that all things are related; it's not just about management and leadership. It is about being a better person, which shines through in your leadership, so people are eager to follow you.



Wayne Caskey, founder, Wayne Caskey Coaching



TIME TO REFLECT

When organizations were fatter, you had people who would help you develop your career within the same company. The advent of coaching comes from the mid '80s when corporation as parent died and everyone has to work at 125 percent all the time. When is the time to reflect? There is none.

Jean Stafford, CEO, Executive Coaching for Women, Inc.

STREET CRED

While there is no universal coaching certification process, these organizations provide prospective coaches with training and credentials.

International Coach Federation (ICF): A global organization that sets standards and provides independent certification for business and personal coaches.

International Association of Coaching (IAC): An independent, global coach certifying body with a mission is "to inspire the ongoing evolution and application of universal coaching standards."

International Consortium for Coaching in Organizations (ICCO): Provides learning events and networking for organizational coaches and seeks to create a "dialog and research community of organizations, coaches, coach training programs and coaching firms."

American Society for Training & Development (ASTD): Association dedicated to workplace learning and performance professionals.

The International Society for Performance Improvement (ISPI): International association dedicated to improving productivity and performance in the workplace.