

# TRANSCEND



## DEVELOPMENTAL COACHING AND TRAINING AT TRANSCEND

*In search of evidence-based talent and leadership development*

### Programs Overview

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Private and Confidential

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# DEVELOPMENTAL COACHING AND TRAINING AT TRANSCEND

*In search of evidence-based talent and leadership development*

**Dedicated to achievement and organizational effectiveness through cultivating purposeful,  
emotionally and mentally balanced cultures**

Our various training and coaching offerings facilitate performance, development and, where necessary, transformation. We use only evidence-based and scientifically informed adult learning frameworks and systematic processes leading to improvements in both personal and organisational effectiveness through achievement, fulfillment, and engagement.

## 1 WHO ARE TRANSCEND?

Transcend International is Hong Kong's leading provider programs designed to help individuals and organisations be adaptive to the profoundly changing and overwhelming conditions created by the current VUCA reality. Our programs and coaching work, which has been delivered on every continent, is oriented to cultivating the competencies that organisations, leaders and individuals need to survive and flourish in what our sister organisation, Potential Project describe as the **PAID** (Pressured, Always-on, Information-overloaded and Distracted) reality (Hougaard, Carter, & Coutts, 2016, p. x).

This **PAID** reality results from rapid, profound and simultaneous shifts in systemic conditions. In particular, technological, demographic, social/cultural, consumer behaviours, competitive corporate governance and CSR requirements add to the sense of overwhelm being experienced by organisations and their people.

Responsive to the above, our programs include training and coaching in: resilience, coaching skills, mindfulness / "actionable self-awareness", stress management, mental / emotional competence and personal change / transformation. Outcomes include improved effectiveness, motivation and, at the same time, well-being.

We also provide, to both individuals and to organisations, International Coach Federation (ICF) and European Mentoring and Coaching Council (EMCC) accredited professional coaching certification and other programs delivered one on one and in groups. Our training programs and coaching work are oriented to cultivating the competencies that organisations and individuals need to survive and flourish in the current PAID (Pressured, Always-on, Information-overloaded and Distracted) reality.

### 1.1 CULTIVATING ADAPTIVE CAPACITY IN THE PAID REALITY

Given the above circumstances, it is evident that organisations need to be "adaptive" and "nimble" to survive and thrive (Heifetz, Grashow, & Linsky, 2009). And that means that so do their leaders and their people. This adaptive agility comes, in a nutshell, through the cultivation and strengthening of intra and interpersonal competence, which are inter-dependent and are, in themselves, a function of the state of awareness known as "mindfulness". We need people who are able to be aware of and then set aside their habitual patterns of thinking and doing (including their biases) and see clearly what is called for in a given moment and context. We need people who believe in Ownership, Accountability and Responsibility rather than Blame, Excuses and Denial and, most of all, we need leaders and people who are excellent at growing and developing themselves and others so that they can step up and contribute

their skills, knowledge, experience and other resources optimally at all times. Most importantly, we need people who are “happy” and “fulfilled” in their work and in their life as it is this sense of fulfillment that creates long term sustainable motivation and with it, success.

To sum it up, we need leaders and people with a “growth”, as opposed to a “fixed” mindset (Dweck, 2008) and this, in turn, means people who are self aware, self managing, appropriately motivated, see things clearly, seeking feedback and are “self-transforming” (Kegan & Lahey, 2009).

It is in these domains of competency development that, through our training and coaching programs, Transcend excels.

## 2 PREAMBLE – THE TRANSCEND POINT OF VIEW

As William James, often regarded as the “founder” of modern, Western, psychology said 100 years or so ago, “...in any moment, what we are “attending to” is our reality”. This simple, yet totally profound statement, made well ahead of its time, is now backed up by modern neuroscience and thought leadership in adult learning theory. Today’s world of rapid and profound systemic and technological change throws up conditions which “collide” with our basic evolutionary legacy to create difficulties in maintaining focus on goals and supporting resources (internal and external) particularly developmental and “soft skill” goals that take people outside their comfort zones.

By default, many, if not most of us, find it especially difficult to keep steady movement towards our goals when are under stress or surrounded by distractions. In fact, it has been shown by numerous studies that, more than 50 percent of the time (on average), we are distracted from our tasks and goals due to this “attentional hijack” in key moments (Killingsworth & Gilbert, 2010)! To make matters worse, this distraction is “involuntary” and without conscious awareness.

### 2.1 IN THE PAID (PRESSURED, ALWAYS-ON, INFORMATION-OVERLOADED AND DISTRACTED) REALITY, SUCCESS GOES BEYOND SIMPLY LEARNING SKILLS

People may attend training programs, acquire skills, knowledge and experience but, if they are unable to orient their “attention” to these internal resources (as well as external “enabling” resources) in key (and often stressful) “moments of choice”, then optimal results may not occur. Results will depend on where attention is in those key moments. The mind, in such moments, may either be attending skillfully to these resources or, more often than not, is instead attending, as if on autopilot, to a habitual pattern of thinking related to the topic. This may be an old reactive pattern driven by anxiety or “hidden assumptions” or, a simple distraction which has caused us to lose the “target” behaviour in that moment.

### 2.2 WHAT ARE WE ATTENDING TO, THE “SIGNAL” OR THE “NOISE”?

Transcend’s goal is to help improve the “signal to noise ratio” in such moments described above. The “signal” is the **developmental target**. This may be a goal, a behaviour or an action required together with the mental and external resources available to the “learner” to help them on the journey to that target. The “noise” is whatever may be causing one to “lose” that target. Noise could include anxieties or habitual patterns of behaviour which “pop up” under stress, or they may be simple distractions or activities which are incorrectly appraised, in key moments of choice where it matters, as being more important or compelling than behaviour leading to the target/goal. The goal of our work is to help keep attention oriented, as far as possible, to what is **actually** the most important thing in the moment, even when “old reactive patterns” or other “distractions” pop up. This requires both the setting of goals that

are capable to inspire action, and, the cultivation of a number of other core faculties and competencies beginning with “acute, actionable, self-awareness”.

Transcends programs address the above conditions by helping clients:

1. determine actionable behaviors and supporting mindsets and also (building the “track”)
2. cultivate the **skills of self-awareness, attention management and emotional / mental self-regulation** (“staying on track”)

These go “hand in hand”. We also help people connect and remember, moment by moment, that which they really care about, what they are “committed to” and their **deepest supporting motivations** (including values) and understand that these motivations may be hijacked by stories (narratives) which under stress, take control. These stories, in turn, create feelings, emotions and therefore choices and actions at times when we need to be able to fix on the true, authentic goal. These narratives may create short-term impulses to act in ways which are against our (and our organisations’) long-term benefit and lead away from what we really care about!

As Thomas Davenport, leader of the strategic business unit of Accenture, said in summing up recent research : “in the modern world, *the understanding and management of attention is now the **single most important determinant of individual and organizational success***”

#### **Example of what can “go wrong”**

As a simple **example** of what can go wrong : Imagine a person who, while having been trained in communication skills, and who genuinely wants to improve in the way they communicate, gets emotionally hijacked as soon as her staff member triggers her. She then, without realizing it, slips into habitually directive patterns of blame and aggression, driven by a “self-protective” short term emotional experience.

Having realized she has made a mistake, she nonetheless goes into self-justification, trying to convince herself that “I had no choice but to say/do that because **you** said/did this .... Etc... we all know the story. This is all because, in the moment of choice, she did not, actually exercise choice. She was on autopilot, reacting out of habit to an old trigger. This reaction has taken her “off target” and the result is that some form of “cleanup” is necessary!

The various coaching and training programs offered by Transcend help individuals to “embody” learned skills and competencies, so that these, in effect, sink “into the bones” and become part of who the individual is, so that they are available to them even in moments of stress. Effectively, our programs help re-align the “autopilot” habits of mind to support developmental goals.

### **2.3 PRINCIPLES UNDERPINNING TRANSCEND PROGRAMS**

**In summary, Transcend’s programs are grounded in the following principals, among others**

- The understanding that individuals, managers and leaders need to adapt styles and behaviours to optimise results in the rapidly changing world of work (the Pressured, Always-on Information-overloaded and Distracted (**PAID**) reality) described above.
- The need to remain conscious of short and long-term developmental objectives and goals moment by moment, even in the midst of difficulties and stress.
- The need, particularly in today’s and tomorrow’s world, to work with and develop people with diverse styles and ways of working and being.
- The need to be able to manage attention moment-by-moment towards goals, strengths and

resources and withdraw attention from distractions, interfering emotions, anxieties or unnecessary thoughts.

- That with focused awareness and effective attention regulation, literally, anything can be changed, even previously held “long term” unconstructive traits which interfere with success and well-being.
- The need to bridge the gap between “what we know” and “what we do” (the “knowing-doing gap)!)
- That leaders and managers are increasingly expected to coach their people to enable growth and development. and that most of what happens when leaders / managers think they are coaching and developing their people is having the opposite impact (“when too much help is given, self confidence, self efficacy and ability are taken away”).
- The need for competencies to be not only developed but embodied, and that default behaviours, driven by “old reactive patterns”, must change for development to occur.
- The need to build “adaptive” as rather than simply “technical” capacity.
- That with focused awareness and effective attention regulation, literally, anything can be changed, even previously held “long term” traits which interfere with the success of individuals.

## A SAMPLE OF OUR OFFERINGS

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# 1 EXECUTIVE COACHING AT TRANSCEND

## 1.1 WHY ENGAGE A TRANSCEND EXECUTIVE COACH

In summary, Transcend Executive Coaching creates broad outcomes that we term “**the 3-selves**” as follows:

- **Self-Awareness.** This is the moment by moment knowing of our mental, physiological and emotional state and how it may be driving our thoughts, feelings and behaviours. As well as this it also involves a flow of understanding, or discovery of, of our authentic and skillfully dermined **motives, values, preferences and goals** together with that which takes us “**off track**”.
- **Self-Management.** This is “recognizing and adjusting” when going “off track”. With the understanding cultivated by self-awareness, the Client will then work on self-regulatory strategy to use this information to the benefit of themselves (and their organisation) rather than just being caught up in the “flow” of experience. In this way instead of **reacting** to stressors or other **external events with “patterned responses” which may create derailment**, Clients will practice, using multiple methods, different ways of **responding** which are constructive and productive.
- **Self-Transformation.** This relates to the ability not only to change in the AOCs but to acquire abilities which will create long term positive change. This occurs through self-observation of ones “Structures of Interpretation” or “narratives” and how they are impacting on reactions, behaviours and (self-limiting) assumptions. This information is obtained through developing a passion to obtain feedback, particularly “disruptive” feedback, and to set aside defensiveness when challenged or disagreed with. Self-transformation provides the foundation for long term development of specific competencies underlying leadership and management skills and without it, performance development may not be sustained.

## 1.2 INSIGHT, PROFESSIONAL GROWTH AND SUSTAINED, ADAPTIVE, BEHAVIOURAL CHANGE

Specifically, results are created through conversations that lead to insight, professional growth and sustained behavioural change by creating long-term motivational balance and attention to their well-formed goals. Transcend coaches are highly trained with cutting edge and evidence based adult learning methods and tools. They have the background, skill, credibility, presence, experience and independence to hold conversations that challenge and stretch counterparts in a way that others cannot, inviting them not only to stretch competency in their AOCs but also to alter their “ways of thinking, feeling and being” as needed to support sustainable change. **Additionally and importantly, all Transcend coaches have a strong leadership background, are trained in mindfulness and in integrating mindfulness and related practices into their work and must submit to regular “supervision”, professional development and ongoing assessment.**

The end result is coaching goals are met and exceeded and organisational results improve at the same time as perceived stress (dis-tress) is being reduced for the client. **Clients learn to bring their best to more and more moments of their work and their life, at the same time helping others to do the same.**

## Specific Outcomes

Individuals who commit to Transcend executive coaching typically achieve **outcomes** such as:

- The ability to better influence peers, seniors and direct reports through developing “presence” and balance
- A clear understanding of areas needed for development together with a clear plan for such development
- Clarification and establishment of a strong leadership legacy and “signature presence” as a leader
- Increased ability to think strategically in terms of outcomes and the capability to deliver those outcomes
- Ability to be aware of and manage bias
- Optimisation of goal setting skills enabling effective prioritisation and resource management
- Improved delegation and empowerment behaviours
- Increased knowledge and insights into themselves and the organisation which allows flexibility, versatility and self confidence
- Improved ability to know when to coach, when to “advise” and when to direct, thereby leading to enhanced people development capability
- Enhanced ability to set appropriate boundaries in their professional (and personal) relationships
- Enhanced communication, collaboration and influencing capability, including more effective listening skills, and the ability to have different and appropriate types of conversations across the organisation
- Exceptional focus and attention to actions which lead to desired results
- Exceptional emotional and mental balance in the midst of stress and “busyness”
- Overall ability to better utilize their learned knowledge and skill in “real world” rather than simply “classroom” conditions
- Long term improvement in the creative insight, innovative capacity and “out of the box” thinking (reduction in cognitive rigidity)
- Improvements in self-efficacy and the creation / strengthening of “growth mindsets”
- Move from an “I” to a “We” mentality – the key to influence and executive presence
- Improvements in self-efficacy and the creation / strengthening of “growth mindsets” both within self and others
- Significant improvement in a number of other critical leadership skills (particularly in the “soft skills” or “cognitive meta-skills” domain, and in particular, to bridge the gap between “knowing” and “doing”).

Leaders and managers are increasingly expected to coach, **but.....**

Most of what happens when managers think they are coaching **is not** coaching.

To get the results coaching promises, competencies must be not only developed but embodied, and default behaviours must change.

The reasons senior people in organisations are not effective are rarely technical, and more often adaptive. Coaching, and certainly learning coaching skills, builds adaptive capacity, the key to success in the modern world of work.

### 1.3 RECOMMENDED APPROACH FOR COACHING ENGAGEMENTS

#### 1.3.1 THE BRIEF

Transcend's Consultant and/or Client services team will extend the briefs to further understand the organisational drivers for the provision of individual coaching. We will, during this phase, clarify, from the organizational perspective, desired outcomes.

#### 1.3.2 RECOMMENDING COACHES

Transcend recommends coaches who are suited to working within organisational environments and are experienced in addressing the aforementioned coaching objectives. We would continue to work with you to select the most appropriate coach for each counterpart.

#### 1.3.3 CHEMISTRY MEETINGS

The coaching relationship is extremely important. The effectiveness of the collaborative relationship is built on trust and the willingness of the coaching counterpart to be appropriately challenged by the coach. Prior to the first session the proposed coach meets with the counterpart to confirm the fit. If the selected coach is not considered appropriate, an alternative coach is offered at this point.

After this phase, the "best fit" coach is selected for the engagement.

#### 1.3.4 COACH BRIEFING

If appropriate, the coach will meet with key stakeholders to take a detailed and up to date brief on the program context and coaching objectives. If available, existing performance data, for example, **360-degree results and any other relevant behavioural information** and feedback on the individual counterparts would be shared at this point. Transcend would also take advice at this point on any other relevant parties to be involved in the coaching. For example, input may be sought from the line manager or HR professional.

Assessments may be suggested and agreed by the coach and coaching counterpart if they would add value to the coaching process.

#### 1.3.5 COMMUNICATIONS WITH COACHING CLIENTS ("COACHEES")

We have prepared an optional comprehensive document entitled "**What To Expect from Your Executive Coaching Engagement**" which is designed to inform the client what the process looks like what to expect from the coach and what role they are expected to play in their own development.

#### 1.3.6 PRE-COACHING QUESTIONNAIRE

The expectations from the coaching are established via a short standard questionnaire. A coaching agreement is signed.

#### 1.3.7 DEVELOPMENTAL ACTION PLANNING

According to our "best practice", the initial sessions concern finalizing "well-formed" coaching goals and expressing them in a way that is capable of inspiring movement. This is often done through an formal integration of

- 360 Data (either by interview or by on line survey)
- Psychometric assessment data (for leaders, we recommend the Hogan Assessment but we are

certified in a number of tools including WB5, FIRO-B, MBTI, Hogan, Genos EI Inventory, PRISM etc)

- Other available data
- Client's emergent reflections
- Coach's observations

From the above data, the client and coach co-create a "DAP" (Developmental Action Plan) with specific behavioural change goals, milestones and timeframes.

### 1.3.8 COACHING SESSIONS

Coaching sessions are usually scheduled to be 1 ¼ hours in duration. They are typically scheduled on a fortnightly to monthly basis over a 4-6 month period, or longer depending on the number of sessions and the coaching objectives. Coaching is often face to face, but Transcend's executive coaches are also experienced in phone and video coaching using web-based conferencing tools if required. During coaching, the coach and the client (possibly including key stakeholders) determine the most useful and desired outcomes and work on the areas identified for development.

The coach structures each stage of the coaching on key adult learning principles. This includes applying the individual's past knowledge and experience to reframe what they already know into a new set of thinking and behaviours. The Client is invited to become aware of their own "conditioning" and to explore and practice with alternative narratives and practices which may lead to different behaviours.

The coaching focus is practical and related to workplace realities. The focus is also on experiential learning, because adults learn best by doing and then reflecting on their experience. During the coaching the coach may identify the most appropriate articles, books, etc to support the learning and will guide the executive to these sources.

Successful coaching requires a collaborative approach, with the coach as a facilitator of change. Between sessions, it is the executive's responsibility to enact change and implement actions that have been agreed to.

#### Summary of Flow of Coaching

1. Coach helps client decide what are some outcomes the client would like to "achieve" in their work or life. These are honed into "well formed" outcomes which are skillfully determined, aligned with values and are capable of inspiring action.
2. Coach helps client determine what needs to change (normally behaviourally) so that these outcomes might have a higher probability of occurring. These become the "well-formed coaching goals" for the work.
3. Coach helps client to work out what narratives, cognitions, ways of making meaning, ways of thinking and feeling need to be developed or strengthened so that these behaviours can be consistently applied despite distractions, including those arising from thoughts and emotions resulting.
4. Coach helps client determine what behaviours, thoughts and feelings are "limiting" the expression of behaviours which might lead to desired outcomes.
5. Coach assesses, with the client, readiness and willingness to do what it takes to change in the above areas, adjusting goals as necessary.
6. Coach helps client design practices to resolve the interference resulting from the above, often involving the strengthening of foundational competences of attentional, cognitive and motivational balance leading to moment by moment emotional and mental balance. This leads to the client being

able to “stay on track” despite distraction or emotion.

7. Coach reviews, session by session, progress with practices and helps client deal with interference preventing practice or progress.
8. Practices may include, *inter-alia* :
  - a. Formal and informal mindfulness practices (progressive practices)
  - b. Self-reflective, self-observational and self-remembering practices and exercises
  - c. “Behavioural activation” practices (practice with new or modified behaviour)

During the coaching the coach will also identify the most appropriate articles, books, etc to support the learning and will guide the executive to these sources.

Successful coaching requires a highly collaborative approach, with the coach as a facilitator of change. Between sessions, it is the client’s responsibility to enact change and implement actions that have been agreed to during the sessions.

### 1.3.9 PROGRESS REVIEW (OPTIONAL)

Mid-point reviews are held for programs of 8 sessions or more (if appropriate). The outcomes achieved are compared to the goals set. The lead coach will also oversee the coaching panel (where appropriate) and collect feedback from coaches throughout the project. The main idea behind the mid-point review is to give feedback on the process and commitment of the client and most importantly to obtain input from the sponsor and stakeholders about what progress is noted and what needs further work.

### 1.3.10 PROJECT MANAGEMENT, LOGISTICS AND REPORTING

At Transcend, we focus almost exclusively on providing services to large organisations. We are experienced in working with major organisations who demand a high quality product and a high level of customer service. We would work with your representatives to define from the outset the most appropriate working relationship. We would work with the representatives to understand the culture, strategic direction, business plans and the type of coaching required.

Transcend is supported by a strong project management and client service team who ensures that the logistics and management of the programs are of an equally high standard. Our system provides for a single contact point between the client and Transcend, regardless of the size of the project.

If required by the Client, we routinely provide monthly status updates, customised billing, and high level overviews.

### 1.3.11 CONFIDENTIALITY AND ETHICS

The coach will work within the professional ethics guidelines designated by the International Coaching Federation. Copies of the ethical guidelines are available on request.

Any specific information discussed or issues raised during the course of coaching will be on a strictly confidential basis, and will not be communicated with persons outside the coaching relationship.

Transcend will maintain file notes on the progress of the coaching sessions, and will ensure complete confidentiality of this information, except in rare circumstances where decreed by law or as agreed by the Client for a specified purpose. In cases where a diagnostic is used Transcend will not share the results of any report with any person other than the report subject i.e .the coaching client, without the express written consent of that client.

The coach will work within the professional ethics guidelines designated by the International Coaching Federation. Copies of the ethical guidelines are available on request.



## 2 CORPORATE TRAINING AT TRANSCEND

Transcend offers a number of scientifically grounded and highly evidenced world-leading training programs oriented to the cultivation of mental effectiveness, resilience, emotional intelligence, communication / collaboration, unconscious bias management, coaching skills and stress-management in the face of fast-paced change.

These programs are set out in the section below.

### 2.1 UNDERSTANDING AND OVERCOMING THE “IMMUNITY TO CHANGE”

Many individuals we’ve encountered have something about his or her behavior that they want to change, but are having a hard time doing it. The Immunity to Change coaching and training method, developed by Professor Robert Kegan of Harvard University (Kegan & Lahey, 2009), is the most effective process we know to address someone’s internal barriers to self-improvement. This process is exciting because it **makes a difference quickly** and is highly “**evidence based**”.

#### **Sustainable Change is Hard**

Maybe your organisation has newly promoted leaders who need to delegate better, build executive presence or align with organizational or cultural change goals.

Such people may have the skill, been on the courses, but are nonetheless not changing. Perhaps you have a senior director of C level person whose “large and in charge” communication style is alienating people. Maybe there is an executive who has been getting feedback in reviews over the past few years that they need to speak up more in meetings with others, or manage conflict skillfully.

If you’re like most of the organisations with whom we work, their people have often made sincere commitments to change. They have participated in training programs, invested in books, outlined self-improvement plans, and set accountability measures. Maybe they can get things to shift for a little while, but eventually they return to habitual ways of relating, working and thinking.

If this sounds like you or people in your organisation, you may need the “Immunity to Change Approach”. This approach deals with the hidden barriers that get in the way of change.

#### **What is the Immunity to Change?**

An example pointed out by Kegan and Lahey unravels the mystery. They point to a study that showed that even when doctors tell heart patients that they will die if they don’t change their habits, only one in seven will follow through successfully. If change is elusive for people even when faced with matters of life and death, Kegan and Lahey argued that desire and motivation alone can’t be enough to change the status quo. They found out that these bad habits were driven by “self protective commitments” installed early on in life. These protective commitments are designed to keep us exactly as we are. This is known as the “psychological immune system”. It is designed to keep us safe, but just like the physical immune system, is prone to error!

#### **Beliefs and Habits**

Kegan and Lahey discovered that behind each of our habits is a strongly held “big assumption” that causes behavior that gets in the way of our real goals. Just like an immune system, these assumptions get in the way of any change that threatens the status quo. This resistance works at the subconscious level and becomes active when we are triggered, stressed or, simply, just busy. In these moments, “protective” behaviours take us in directions that may work against change goals.

#### **Example**

If one of my “big assumptions” is that my value lies in being an expert and being seen as such, I am likely to be very prone to asserting my views, looking clever and “being seen to be right”. In key “moments of choice, particularly under stress or when busy, I will likely defend my expert status at all costs, becoming “identified” with and “living through” this storyline. My developmental goal of listening better and accepting other’s influence and opinions likely be overcome by the habitual impulses designed to meet the “hidden commitment” of always being seen as the expert.

It turns out that even a strong desire and motivation to be a better leader can’t compete with the deeply seated (and hidden from conscious view) and embodied belief that my value lies in being an expert. In this case, we are dealing with an “Immunity to Change” that first needs to be unearthed for real and lasting improvement to be possible. In other words, the protective, hidden value or commitment (to always be seen as “the expert”) needs to be brought into conscious view, the assumptions challenged so that we can release ourselves from being “subject to” this commitment in the “moment of choice”.

### 2.1.1 UNDERSTANDING AND OVERCOMING THE “IMMUNITY TO CHANGE” WORKSHOP

The **Immunity to Change** training and coaching process is most useful for the thornier and more difficult self-improvement or change goals. Common leadership improvement goals that the Immunity to Change process addresses, include: delegation, communication (speaking clearly/succinctly, engaging in conflict constructively, speaking up with peers or executives, listening and empowering, prioritizing and creating focus, building trust and relationships, developing and coaching others, work/life balance, collaboration with others and building executive presence.

Over a 1-2 day process, participants will work with one such challenging developmental (behavioural change) goals which are important to their career or their life. Using a highly experiential and interactive process we will help participants create an “immunity map” so that they can see clearly their “hidden, protective commitments and assumptions” which may block their progress. The process helps to surface the protective assumptions (which, in fact, are simply stories which are almost certainly not true) and design tests so that they can be released from their impact.

The process is somewhat like the ladder of learning in reverse, taking participants from being “

**Unconsciously immune**, to

**Consciously immune**, to

**Consciously “released”** (from the “grip” of the assumptions blocking change) to, finally,

**Unconsciously released** (where the target behaviour becomes “default”, even under stress, because the protective assumption no longer has power to derail it).

## 2.2 RESILIENCE AND “STRESS MANAGEMENT” PROGRAMS

**Scientifically validated strategies to create optimal performance and well-being under stress.**

Being able to envision positive and meaningful outcomes which are aligned with deep-seated values and “meaning” enables a person to set attractive goals capable of providing tremendous motivation. The faculty of resilience enables a person to keep moving towards these goals, even though the road may become rocky and full of obstacles.

Resilience is a quality of mind that can be cultivated through learning and applying a set of skills and practices. Once cultivated, resilience provides a significant shift in mindsets meaning we are less likely to be knocked “off track” by actual or anticipated obstacles or adversity. “Failure” is seen as temporary; as an opportunity to learn, rather than as an indicator of an enduring lack of talent or intelligence. It is seen as a temporary setback. Self-efficacy is high, challenges are seen as a part of growth and feedback is sought after as a learning tool.

Resilient people don't get caught in catastrophising, rumination or undue simulation of “worst case scenarios”, and are generally endowed with a “growth mindset”. They don't give up, steadily working towards their goals despite setbacks, obstacles or adversity.

Resilience is related to the psychological quality “stress-hardiness”. While primarily a mental phenomenon, it requires a sharp and “serviceable” mind. We also recognize in our programs that there is a relationship between body and mind. We help with simple physical energy management strategies which help to create such a mind. These include practices which attend to reasonable physical activity (easier than many think), nutrition, sleep and mental energy strategies.

### 2.2.1 TRANSCEND’S APPROACH TO CULTIVATING RESILIENCE

Our approach relies on 3 pillars, all of which are trainable.

#### 2.2.2 PILLAR 1 – CULTIVATE A CALM, CLEAR AND FOCUSED MIND

Such a mind is able to focus attention at will. A mind which is calm, clear and effective necessary for any change to occur in an individual’s level of resilience. Such a mind is a mind that can notice when it has been “caught” in unproductive rumination or catastrophising and is able to redirect the spotlight of attention at will to a resource or a strength or, simply, a different set of thoughts. Such a mind is cultivated through a number of practices including mindfulness, somatic practices and journaling practices, both formal and informal.

Included in this part we may include suggestions and practices to help with physical and energy management, recognizing the “mind-body” connection.

#### 2.2.3 PILLAR 2 – EMOTIONAL AWARENESS

Our approach recognizes that experiences of success and failure are emotional experiences. In particular, in people who lack resilience, the anticipation of failure creates an unpleasant emotional experience tied to a deeply seated emotional memory. Once this is triggered, it causes resistance. This in turn drives “comfort zone” behaviour. When we learn to recognize the arising of the emotion in the body, and cultivate the ability to not immediately react to it, it is then possible to get ahead of the resistance and act with consciousness and empowerment.

#### 2.2.4 PILLAR 3 – “REFRAMING” THE STORIES

With this moment we can look at how we are explaining our experience of “success” of “failure” to ourselves. Emotions felt as we experience or anticipation of failure are related to what Martin Seligman calls the “Explanatory Style”. These are the stories we tell ourselves about failure of success. Those who have a “Positive Explanatory Style” see failure as transient and don't generalize the experience across other areas of their life. They are simply opportunities to learn. Those who have a “Negative Explanatory Style” see failure as being “about them”. They feel they lack talent, that they are not good enough and will never

succeed. They also tend to generalize and associate this across other areas of their lives. Once we have introduced in Pillar 2, through a simple practice on emotional awareness, the ability to be “non-reactive” and accepting of what is happening right now (and what we cannot change about the past), we then have a “moment of choice” in which we can “reframe” the stories that create the emotions in anticipation of failure.

### 2.2.5 POSSIBLE OUTLINE FOR A HALF DAY (3.5 - 4 HOUR) WORKSHOP

In the context of a half-day workshop we would introduce the core components of the “3 Pillars. Apart from the group discussions and individual reflections, we would propose 2 group practices and a “journaling exercise” to help the learning “sink in”.

Content of the workshop may include:

#### Basics

- Introductions and objectives
- Definitions of resilience
- Why resilience is important at work (group discussion)

#### The 3 pillars of resilience

##### Pillar 1 - Calm mind

- What are you attending to – class activity
- Practice on calming the mind / debrief of practice

##### Pillar 2 - Emotional awareness

- Failure as an “emotional experience”
- Resilience and attentional management – attention is creates “experience” - practice
- Patience, impulse control and resilience
- Making emotions our friends rather than our enemies
- Practice on emotional self-awareness

##### Pillar 3 - Cognitive resilience – Explanatory style

- Cognitive resilience – Awareness and management of negativity and confirmation bias
- Approaches to cultivating a “growth”, vs “fixed” mindset
- Practice on “cognitive resilience”
- Neuroscience of resilience

#### Next steps

- What will you do now ? Takeaways and next steps

### 2.2.6 ADDITIONAL MATERIAL FOR MANAGER / LEADER PROGRAMS

Apart from cultivating resilience within yourself, the key to cultivating resilience in others is to help foster a growth mindset, a major component of which is helping to cultivate a “positive explanatory style” in others. A major (but not the only) component of this is related to how various workplace conversations (including initiating / expectation setting expectations, goals, checking in, performance management and feedback conversations.

Topics may include :

- Your mindset and its impact on others
- Goals that GROW people

- 
- The language of growth – phrases and words for **immediate** impact
  - Measurements for growth (mindset)
  - Conversations to build resilience and growth – Beginning, Middle and End
    - Initiating, expectations and goals
    - understanding and meaning
    - performance management, requests and promises
    - closure
    - SBI conversations for growth
  - Practice – “commenting on progress” worksheet
  - Take-aways and next steps – what is one thing you will do differently starting today ?

## 2.3 COMMUNICATIONS RELATED PROGRAMS AND COMMUNICATIONS COACHING

### 2.3.1 SELF / OTHERS AWARENESS-BASED SKILFUL COMMUNICATION (FROM 2 HOURS UP TO 2 DAY WORKSHOPS)

The example outline below in its complete form will be 2 full days or 15 hours of training in total. This can, of course, be delivered in a number of ways and formats. If less than 2 days is required then we are able to cut some of the content depending on specific requirements.

The program includes a balance of working with the psychology of awareness and patterns of thinking / feeling and the building teaching and practice with the technical side of changing communications behaviours.

We would normally train up to 15 people using 1 trainer / facilitator. If more people than this are required to be trained then please discuss as we may need to utilise a co-facilitator in this case which will increase the cost by around HKD 7.5 k per day.

#### Potential Topics

Below is a high level idea of the kinds of topics which have worked well for organisations involved with challenges such as those you are facing:

- Knowing – doing gap exercises. Highlights the nature of the learning process and how its less important “what we know” than it is “what we do, with what we know”, particularly in key moments of choice (normally under stress or when busy).
- Converting learning into change – An introduction to change basics and theories (details below) (As Einstein said, “make things as simple as possible, but no simpler”. A brief exploration of foundational thinking about change and how learning becomes embodied into behaviour (and what blocks this process), all related to your situation. In this section we show how change is often inhibited by deep seated beliefs, assumptions and perceptions which have often been installed early in life as protective coping strategies. These strategies are often mal-adaptive to individuals current work and life conditions.
- The 7 Reactions to Change – an active and engaging activity and discussion that reveals common reactions to personal change (including being asked to do things which are “unfamiliar” or “against the grain”) and shows how they differ in individuals
- Styles and roles in personal change (and helping others change),
- Effective workplace conversations module, dealing with conversations, requests, negotiations and feedback.
- “Brain friendly” learning and change – what actually is occurring in the human brain during learning and change and how we can use this knowledge to overcome our default tendencies and biases
- Self-awareness assessments and exercises / role plays around these (MBTI / DISC / Colours etc). These tend to be a highlight and create lasting insight. These are done “in class” in a fun, engaging and interactive format which creates profound and lasting insight.

## 2.4 COACHING SKILLS TRAINING PROGRAMS

This suite of skills-based programs helps organisations who wish to create a culture of ownership, accountability and responsibility, moving away from command and control leadership. Further information is available on this suite on request.

### 2.4.1 1, 2 AND 3 DAY, “COACHING SKILLS FOR LEADERS” PROGRAM - CORE CONTENT

The focus of the Core Content can be adapted to suit the language, culture or organisational needs. This highly engaging, interactive and practice intensive program will give leaders the ability to coach effectively, informally “on the go” and in specific formal developmental contexts.

During the design phase, we work closely with clients to create harmony between core-content, essential to develop coaching skill, and the organisational areas of concern and potential dynamics. We tailor the language and practice sessions to focus on areas of importance, creating a seamless pathway to associate coaching skills with desired organisational outcomes.

A common outline is as follows :

#### 1.1.1.1 CORE CURRICULUM

##### Introduction, Welcome and Preparation for learning

- Brief introduction
- Introductions, with a “what do you know about coaching”? activity
- Learning goals (as part of above activity)

##### Coaching within an organizational context

- Coaching and its distinction from other “relationships” or “roles” we play at work
- Differing developmental approaches – when and how
- Coaching in organisations – how and why it works. Distinctions.
- Bridging the Knowing Doing Gap (incl activity)
- ICF and Transcend definition of coaching – discussion
- The difference between learning and change
- Neurology of leadership. Why don't people use their skills, knowledge and experience in key choice moments?
- The nature of the “threat” and the “approach’ state and how it impacts performance

##### Key distinctions about coaching vs other roles

- Mindset of the Coach - Performance Formula
- Coaching Landscape - Human Domains, coaching the whole person (not just “the problem”), understanding resistance to change, targeting development
- Relationship - the unique dynamics of coaching direct reports and peers
- Trust – the trust formula – relevance to coaching

##### Core skills of Coaching

- Questioning skills – types of questions, when to use which
- Listening skills – generous and “mindful” listening
- Coming to a topic (the “Islands of Interest” tool)

- The GROW model :
  - G-R - explanation and practice session
  - O-W - explanation and practice session
- Designing SMART actions – Wrap-Up
- Coaching in the “Iceberg” – the Iceberg model and implication for coaching
- Designing coaching questions with the Human Domains Model
- The ladder of learning – reflective practice

#### *1.1.1.2 OPTIONAL MODULES (2-3 AREAS CAN BE ADDED TO THE CORE CURRICULUM ABOVE FOR THE 3 DAY PROGRAM)*

- Structure - Coaching on the Go (GROW on the GO)- short focused structured conversations that add value and create ownership
- The neurobiology of coaching for insight
- What are you “in the middle of”?
- Coaching for high potential
- Coaching for core competency development
- The 7 reactions to change (activity) – implications for coaching
- Giving and receiving feedback
- Coaching “unconstructive” behaviours
- Coaching differing personalities and difficult people
- Feed forward – a new paradigm
- Coaching for emotional balance and intelligence
- Coaching for empowerment – the “empowerment model”
- Coaching for transformative development – making meaning

## **2.5 COACHING / TRAINING FOR SIGNIFICANT CAREER / PERSONAL TRANSITION (INCLUDING RETIREMENT)**

### **2.5.1 BACKGROUND – PURPOSE**

Within the “baby boomer” generation (those born between late 1940’s and, mid 1960’s) is a very interesting group sometimes known as “Generation Jones” (as coined by the author Jonathan Pontell (Wassel, 2011)). The main difference between the Joneses’ and other baby boomers is that they were not, particularly in the West, involved in wars, compulsory military service or other salient political causes which occupied the young mind.

Joneses were, as a group, given huge expectations as children to achieve what their parents often were unable to achieve because of wartime interruptions to education, careers or because of wartime loss of a breadwinning family member.

As a generation, Joneses became “strivers”. Striving for more. More education, more wealth, power, fame, reputation. They were taught to always “be first” to “win at all costs” and became identified with working hard in pursuit of these goals.

**The processes set out below can be delivered in a workshop format, as a framework to guide coaching interventions or as a “hybrid” of blended coaching / training approach.**

### 2.5.2 PARTICULAR CHALLENGES FOR “GENERATION JONESERS”

Jonesers can be well suited to building careers and to climbing whatever ladders are put in front of them. The challenge is that they can be single-minded in their pursuit of these goals, overcoming obstacles and working hard. Challenges can arise when this externally imposed sense of purpose and worth is removed. This can happen at retirement when individuals are, suddenly, left to create a sense of meaning which is entirely different from that on which they have relied for virtually the whole of their life so far. This can create a sense of loss, longing or living in the past, anger, abandonment and in the worst-case depression and everything that that involves.

The answer is to help those approaching retirement to connect with an “internal” sense of meaning and purpose, while at the same time allowing celebration rather than melancholy when reflecting over the the past.

Many “Jonesers” have been taught that life is about setting goals and knowing where you are going. This can be clear for people when they are in a career. Jonesers as a group are good at planning their career and are identified with their careers. Not having this identity can result in a significant sense of loss as retirement approaches or when the day finally comes.

### 2.5.3 CULTIVATING A “SENSE OF PURPOSE”

The key is to help individuals to loosen the identification with current and past roles in order to provide freedom to be curious and connect to a deeper sense of meaning and purpose.

**Overall Themes –**

**Ending well – strengthening the “legacy”**

**Living a purposeful and meaningful post-retirement life, connected to Values.**

**Connecting to a sense of “Purpose”.**

The process described below can help to minimise the sense of loss which can occur with some people at retirement, instead enabling a sense of celebration for past achievements, providing closure and enabling letting go and moving on with a curious, open minded exploration of “valued” outcomes (Hayes, Strosahl, & Wilson, 2011).

It is no longer controversial that the discovery of values and meaning is the key to a contented life of “genuine happiness” (Peterson, Park, & Seligman, 2005; Seligman, 2012), trumping the “pursuit of sensory or emotional pleasure”. This is particularly the case for individuals approaching the end of their career. Long term life satisfaction is also correlated with a “shift” in worldview and orientation from “Hedonia” (seeking pleasure) to “Eudaimonia”, (meaningfulness), as described by Seligman (2012), Maslow (1967) and others. Paraphrasing Seligman, discovering meaning provides a sense of durable well-being, in which case the pursuit of “pleasure” is the “icing on the cake”.

There are a number of approaches individuals can pursue to unlock or discover meaning and associated values leading to “authentic happiness”. One approach which works well with senior leaders and other corporate settings includes a process of discovering what one really cares about, what brings one to their best or provides a sense of aliveness, and then work out what “values” or “qualities” need to be expressed in order that this might happen more often. The process explores psychological, family, financial and

There is evidence that once values have been discovered, clarified and allowed to become embodied then happiness becomes less about “outcomes” (I wish to be rich / travel widely / have a great reputation / be recognised / be respected) but more about making choices which are in line with these values. It is evident that once these choices are made, desired outcomes are more likely (but never certain). Whether outcomes occur or whether they don't, happiness arises from expressing oneself in relation to values and meaning. Underpinning all of this, the cultivation of core mental qualities of

Presence / Patience / Acceptance / Curiosity / Trust / Letting go / Courage and others are normally behind such changes at the “root” level.

#### 2.5.4 RECOMMENDED PROCESSES:

This section summarises a proposed flow of activity which is customisable depending on the nature of the client group or individual.

The processes below facilitate a number of ways of unlocking the “heart-mind” connection and enhancing deep self-awareness, discovery of a sense of meaning and purpose and, finally, commitment to pursue (Hanson, 2013). It is important that people are not “contracted” or “agitated” about lack of clarity of their values and purpose at this stage. Sometimes, this process “unlocks” these insights quickly, sometimes it requires time and iteration. This process, however, gives such self-discovery a good chance.

#### Steps are :

- Individual guided reflection(s) related to both “ending the current phase well” and creating a future vision
- <optional> completing a number of reflective “envisioning worksheets” designed to unlock insights (can also be done as “pre-work”).
- Journaling a summary of the reflections
- Speaking out thoughts / stories to others while being listened to by an “attuned” listener (coach / peer)
- Listening and connecting to an attuned listener’s (coach / peer’s) “interpretation” of your story
- Reflecting, re-writing/extending the journal and allowing learning / awareness to “sink in”
- Teaching steps to continue the process

##### 2.5.4.1 THE STARTING POINT - INDIVIDUAL GUIDED REFLECTIVE MINDFULNESS PRACTICE

Connecting to values and “purpose” is a creative process which also involves emotion. Evidence indicates that creative processes and connection to “meaning” occurs more readily when the mind, which tends to be very “noisy”, is allowed to move into a quiet reflective state (known as an “alpha” state (Jung-Beeman et al., 2004; Lustenberger, Boyle, Foulser, Mellin, & Fröhlich, 2015). It is therefore useful to teach a practice which can be used to settle the habitually noisy mind so that subconscious creative processes and connections can occur. Participants can continue this simple practice to build the mental orientations necessary for such creative process.

##### 2.5.4.2 PROPRIOCEPTIVE WRITTEN “ENVISIONING” EXERCISE

With a settled mind we now move into the “envisioning” exercises.

##### 2.5.4.3 RATIONALE FOR THIS PROCESS:

This section helps an individual contemplate one or more ideal futures, important roles and possible identities are related to areas that the participant cares most about and are capable of providing motivation, a profound sense of purpose, meaning and happiness. The process helps to leverage the power of the “predictive brain” to contemplate meaningful outcomes and then work towards these (Pally, 2007).

Proprioceptive writing is a form of writing which prevents the “thinking mind” getting in the way of creativity and connection to emotions and intuition (Metcalf, 2008).

Immediately after the meditative reflection above, we ask participants to write for 5-7 minutes using a number of carefully designed “prompts”. To get the best from this activity, participants will be advised to keep the pen moving non-stop for the whole of the 5-7 minute process, not stopping to “think”.

#### 2.5.4.4 SHARING / FEEDBACK (PEER-PEER OR WITH COACH)

The writing exercises are followed by a feedback process which allows the individual to speak out their story to another (peer or coach), and receive feedback on what has been said and what the listener experiences as being “felt” by the participant.

This is done to strengthen the self-awareness of the “client”. It allows the client to luxuriate in the positive feelings arising when contemplating meaningful future outcomes (Hanson, 2013).

The end of this process involves re-summarising reflections in the participants’ learning journals.

#### 2.5.4.5 VALUES DISCOVERY / STRENGTHENING

The “envisioning” process is then followed by an investigation of core values and how the expression of these values connect to envisioned future outcomes (Hayes et al., 2011). This process also creates insight about how the expression of values is linked to “being at one’s best”, “feeling alive” or “acting in service of what one really cares about”. A significant sense of purpose and well-being can arise through this process as participants begin to mentally “step into” their envisioned “way of being”

This part of the process is guided to keep looking forward. Focusing on an important possible identity in the future of the participants and “dismissing” identification with the past where appropriate.

#### **Transcend Values Card Sort / Clarification Method**

Again, this process should not be “thought through” too much, it should be executed as quickly as possible. Again, the goal is to get the “logical rational” and the “fixer” mind out of the way (I will explain this in set-up).

The process leads to the discovery / creation of “WfV” (Well Formed Values) using steps below.

1. Choosing the most important value(s) arising from a “card sort” using the “Transcend International Values Cards”, the client clarifies this value using a number of criteria (guided by us) as best they can. Participants attempt to identify what it’s like when the value is expressed (and how does it link to the context), what it’s like when violated, what makes it difficult to express the value and, importantly, what additional values or qualities might be used in the moment prevent the “leakage” of the power of the chosen value (often related to subconscious “drivers”).
2. Participants are then asked to reflect on how this value may be consistent with the embodiment of important envisioned future identities, exploring any conflict or “leakage” that may occur and reflecting / mentally rehearsing ways of resolving this. Of course, in the “real world” it is matters like this that hijack our dreams, goals and even plans as we fail to anticipate those “hidden” values / goals / motivators that drive our actual moment-by-moment behaviours.
3. Process above is repeated for other key values.
4. Finally, participants will reflect on what they wish to ensure they remember from this process going forward, together with thoughts about how that might happen.

#### 2.5.4.6 OPTIONAL CONTENT – REFLECTIVE WORKSHEETS

If this option is used, it is best used as an input to the processes described above. We use a number of reflective worksheets including all or any of the following :

- Birds of a Feather
- Highlights from Current Role / Situation – “Good, Bad and Ugly”
- Original Joys
- Passions and Gifts
- First Career Dreams
- Your Ideal Work Day
- Consistent Themes

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#### 2.5.4.7 WRAP-UPS / ACTION PLAN CREATING ACTION LEARNING COMMITMENTS FROM THE WORKSHOP INCLUDING:

What specifically will you do going forward? When and where?

<Optional – write a letter to self and give it to someone else to post to them 1 month later>

How frequently?

What might interfere?

How will you manage interference?

Who can you enrol in your development?

How will you hold yourself accountable (and who can assist)?

How will you measure success?

#### 2.5.5 OUTCOMES

Once this process is complete participants should have an enhanced self-awareness of :

1. What mindsets / strategies might help with “ending well” (optimising legacy from current role)
2. What they “really care about” or what is most important to them.
3. Preliminary commitments (future roles / identities),
4. What values need to be expressed to support these commitments, moment by moment,
5. What might interfere with the expression of these, and
6. What additional qualities need to be “activated” to resolve the interference.
7. What they intend to do with their learning going forward

The important thing is that there are some “action learning commitments”. These simply remind participants to regularly check in with the wisdom that they accessed during the program. Re-reflecting, refreshing, allowing changes, clarifying etc. It is as well to provide some form of structure or reminder for this so that by the time that “final day” arrives they have ended well and are looking forward to their future.

## 2.6 GENOS / TRANSCEND EMOTIONAL INTELLIGENCE PROGRAMS

### 2.6.1 GENOS EMOTIONAL INTELLIGENCE CERTIFICATION

This training is available as an “open enrolment” workshop or as a “corporate program”.

The Genos Emotional Intelligence Certification Program is specially designed to make **you** the expert in applying **Emotional Intelligence** in the workplace. We are proud to partner with **Genos International** to deliver their globally recognised program in Asia.

When you successfully complete all the elements of this program you will be a Genos Certified Practitioner being able to:

Order (at a significant discount) and conduct your own debriefs of a variety of Genos EI assessments, thereby develop individuals’ and teams’ emotional intelligence by assessing and debriefing their assessment results.

Provide practical tools and techniques for applying and being more emotionally intelligent in the workplace

Design and deliver group emotional intelligence development sessions

#### Who is it for?

The Genos EI Certification Program is designed for experienced learning and organisational development professionals, human resource consultants, senior line managers, executive coaches, and organisational psychologists.

We can also accommodate corporate groups and deliver internal organisational programs

#### Program Format

2 day facilitated program - filled with inspirational content, practical participative activities, experiential scenarios, facilitating and debriefing practice.

A personal 360 degree Emotional Intelligence Assessment and a debrief by a certified coach.

A practicum, where you will debrief a Master Trainer using a sample report. You will receive feedback to ensure you are capable of effectively applying the Genos EI tools effectively.

Your organisation’s coaches will receive 10 International Coach Federation CCE hours in Core Competency training and 4 Resource Development hours by completing one our programs.

### 2.6.2 GENOS EI ASSESSEMENTS

Available in Cantonese, Mandarin, English and a variety of European Languages

Together with Genos International we bring a suite of assessments that measure the emotionally intelligent workplace behaviours that underpin success. They are supported by a wealth of peer-reviewed research and are accompanied by beautiful reports containing practical development suggestions. Genos are used by Fortune 500 companies around the world across all industries and organisational levels.

We have a wide range of reports designed for all levels of leaders, managers and employees.

#### Assessment Reports

*Genos Emotionally Intelligent Leadership Report*

360, 180 and Self Rated versions available

For Senior Leadership, High Potentials, Managers and Front Line employees. This report measures 6 Emotionally Intelligent Leadership competencies and is an excellent companion to leadership development programs and professional executive coaching engagements. Use it incrementally to measure progress and development. This report is especially powerful when combined with a competency development program such as IGNITE.

### *Genos Emotional Intelligence Development Report*

Designed for personal reflection and large group workshops, individual contributors and in-depth EI development this report is available in 360 and Self Rated versions. This report measures frequency of behaviours in 7 Emotionally Intelligent Behaviours. Aggregate group reports available.

### *Genos Enduring Impact Report*

Designed for individuals and groups this report is an excellent foundation for developing groups of leaders and can accompany training programs for large and small groups.

### **Key Features of our Reports**

All our reports are beautifully presented and make the interpretation of results engaging and readily accessible.

Raters can provide free text responses which are captured in the Feedback Report and help leaders understand the context behind rater responses to assessment questions.

Development tips or plans are also provided for each competency, skill or factor assessed.

### **2.6.3 GENOS / TRANSCEND EI PROGRAMS**

A wide variety of interactive and practical programs are available with flexible delivery periods and we are happy to create a bespoke design to match your needs and budget. The target is Emotionally Intelligent skill development and increase in engagement performance.

[IGNITE](#) is our 6-8 month leadership programs featuring multiple assessments and development modules available in person, online, or bundled into intensives. A full synopsis is available on our website

Half day, 1 day and 2 day programs are available and also can be tailored to meet the needs of your organisation.

[Coaching and mentoring programs](#) can also be delivered if you want a small group or individual approach delivered by a Genos Master Trainer who is also a PCC level ICF credentialed professional coach.

All our programs transfer cutting edge content, assessments, frameworks, and tools into practical behavioral change that endures and has impact. Programs present a holistic approach to development by improving a foundational set of skills that create greater personal and inter-personal success within and outside of the workplace. That's why we call them game changing for business and life changing for people.

In addition to the programs detailed below, we can train you in how to deliver them to your clients/people or to create customised versions of them. All the programs listed below come in Train-the-Trainer formats. Our programs have been expertly designed, tested and shown to deliver tangible positive in business outcomes.

### **2.6.4 LEADER IGNITE**

An emotional intelligence development program designed to:

1. Improve self-awareness and resilience
2. Help people engage in change
3. Improve how people facilitate challenging conversations
4. Enhance team work and collaboration
5. Improve employee engagement and morale
6. Enhance leadership effectiveness

If you are looking to improve the performance of your business by improving one or more of the above then this program may benefit you.

### The value proposition

Ignite is an emotional intelligence enhancement program for leaders at all levels. It is a personal transformation program that develops core emotional intelligence and improves individuals' leadership, impact, influence and resilience as a result. Implemented across a division, function, or your organisation, it will improve productivity, collaboration, innovation, your capacity to drive change, team work and customer service.

The Ignite Program comprises a blend of different learning experiences to produce lasting results. There are six core modules of the program. Each session, delivered in a two hour, professionally facilitated format, includes:

1. Relevant pre-work
2. Cutting edge research
3. Inspirational content
4. Experiential scenarios
5. Practice applications of practical, applicable models and techniques
6. On-the-job applications

It is through the combination of the learning methodologies, learning journey structure, assessments before and after the program and on-the-job applications of practical models and techniques that participants experience enduring improvements in their emotional intelligence.

#### 2.6.5 ENDURING IMPACT

A modular, experiential EI development program for frontline through middle manager-level employees. The series assesses, develops, and applies the skills of emotional intelligence through a variety of learning experiences in service of building intra and interpersonal effectiveness—the foundation of success for the future leaders in your business.

The series includes a simplified four-dimension EI multi-rater (self and others) report (awareness, expression, reasoning, and management) and five developmental modules (4 hour classroom sessions) centred on understanding EI and the development of EI skills in service of management and leadership effectiveness. These five modules are:

1. Introduction to Emotional Intelligence
2. The Aware Leader
3. The Authentic Leader
4. The Expansive Leader
5. The Centred Leader

Frontline employees through mid-management levels, graduate inductees, high-potentials—any individual with a desire to build a foundation of EI skills and capabilities in preparation to more effectively manage and lead people

#### 2.6.6 ONE-DAY AND TWO DAY PROGRAMS

These programs help participants explore and practice tools and techniques for applying emotional intelligence at work. The tools and techniques can also be applied outside of the workplace with friends and family. Applying the theory, tools and techniques explored in this workshop will help people to improve their:

1. Emotional self-awareness
2. Understanding of others emotions and how to positively influence them

3. Capacity to effectively handle difficult conversations
4. Resilience
5. Capacity to help others in stressful situations.

These programs are suitable as an introduction to emotional intelligence or as a component that can be built into a larger employee development program.

### 2.6.7 LUNCH'N LEARN, KEYNOTE OR 1 ½ HOUR WORKSHOPS

This engaging and inspiring workshop will create a powerful connection between emotionally intelligent leadership competencies and performance, career and organisational success. Content can cover:

- The science of emotions - what is happening physiologically when we experience emotions
- Powerful and relevant research on the impact of EI on performance, engagement and the bottom line
- Ways of beginning to change our responses, moving from “reaction” to “response”
- Training the “mental muscle” of self-awareness and self-management. How to do?
- How to assess and build EI competencies using the Genos model of emotional intelligence

### 2.6.8 MOTIVATING AND ENGAGING YOUR TEAM (ONE DAY)

Most leaders know that at the heart of every productive and successful business lies a thriving organisational culture – an environment where hard working people collaborate intensely and passionately to produce great results. Because this culture is difficult to achieve and replicate, it’s also seen as a critical lever of sustainable competitive advantage.

Most leaders recognise “keeping people engaged, motivated and committed” as a critical part of their function. However, most leaders will also tell you that motivating employees and keeping them engaged isn’t so easy a task. Many factors influence an individual’s motivation ranging from day-to-day tasks, right through to the working styles of colleagues. What is motivating for one can be de-motivating for others

#### **This program equips leaders with:**

An in-depth understanding of employee engagement and why it’s important to an organisation’s performance,

Insight into how engaged they are personally, and what they can do to enhance their own engagement

A tool kit, process, and techniques for facilitating effective individual engagement reviews with staff.

#### **Target Audience**

Frontline to senior leaders who want to motivate their staff and drive not only better employee performance, but also higher levels of employee satisfaction and success.

#### **Format**

A One day facilitated workshop including:

1. A personal motivation assessment as pre-work
2. Inspirational content
3. Participative methods
4. Experiential scenarios
5. Role-play based applications
6. Post-program action learning project.

#### **Learning outcomes**

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Participants leave the workshop being able to:

1. Effectively conduct individual engagement reviews.
2. Lead staff with a more motivating leadership style.
3. Drive higher levels of performance, satisfaction and success with their staff.

When rolled out across the leadership group of an organisation, this program creates a shared ownership model for improving employee engagement. A model where individual contributors and leaders both take responsibility for improving engagement within themselves, their colleagues and the company.

## 2.7 MINDFULNESS BASED APPROACHES TO CULTIVATE FOCUS, PERFORMANCE, RESILIENCE AND WELL-BEING AT WORK:

Our sister company, the **Potential Project** Hong Kong and China, ([www.potentialproject.com.hk](http://www.potentialproject.com.hk)) is part of a global organization representing the global “Gold Standard” in corporate mindfulness based trainings (“CBMT”) since 2008 with more than 220 highly skilled and qualified trainers in over 25 countries worldwide including in Hong Kong, China, Singapore, Australia, Europe, UK and the Americas. Globally we have now trained in excess of 25,000 people through our various programs.

Our programs are specifically designed to meet the needs of people with little time and high expectations for results. The aims and outcomes of our various programs are to enable people to actualize their potential for performing at the highest level while living a happy and meaningful work-life.

The **Potential Project** programs are based on a synthesis of scientific research in psychology, neurobiology, and mental training techniques that have been successfully tested by both modern science and by contemplative practitioners over thousands of years. We combine state-of-the-art scientific findings with experience and practice-based expertise. Our programs have been designed with input from senior executives, middle managers and front line employees on what works best within an organizational context.

It has been shown in repeated studies that mindfulness training is the best way to create long term improvements in levels of **self-awareness**. This leads, in turn, to our ability to step off the “autopilot” of deeply conditioned, habitual patterns of thinking and behaving and make conscious moment-by-moment choices in line with our “true goals” and our “authentic”, skillful selves. Once this happens, we become better able to make appropriate choices using of all our internal and external resources. This is, in turn, the key to exceptional emotional and mental balance, focus, resilience and effectiveness under stress. It is also the key to the discovery of intrinsic motivation and the cultivation of a quiet self confidence that is not dependant on the ego.

To conclude, CBMT offers effective tools to deal with modern workplace pressures. The outcome is increased emotional and mental balance, enabling resilience, clarity and purpose.

### 2.7.1 WHY MINDFULNESS TRAINING FOR THE WORKPLACE?

Increasing workloads and tighter deadlines are the major challenges of today's work life. Without effective tools to deal with that pressure the result is often emotional, mental and physiological imbalance, at work as well as at home. However, we now know that it is possible meet our daily challenges, and to do so with clarity, resilience, kindness and happiness.

All our words and actions and, consequently, results all start as thoughts, either conscious or subconscious. If we want to change anything in our life, whether it is social relations or professional performance, we need to start with the mind.

Our Corporate-Based Mindfulness Training (CBMT) suite offers an effective step-by-step method to achieve a considerable reduction in perceived stress as well as an increased ability to concentrate and focus. Uniquely, we have almost two decades of experience in conducting mindfulness based trainings and also have relevant corporate experience which ensures the consistently high quality of our programs.

Many people in today’s fast-paced, complex, ever changing work environments, feel pressured by the clock. They do not feel they have enough hours in the day to do everything they need to do and are often resistant to any notion of adding something more. Our goal is to fully integrate the training into day-to-day work life so instead of being “yet another thing to do”, mindfulness becomes a way to be “more effective in everything you do”. We teach ways to introduce both formal and informal practices so that mindfulness and self awareness become a way of life, rather than just something done “on the cushion” or in formal practice.

### 2.7.2 INDIVIDUAL AND ORGANIZATIONAL BENEFITS

Nearly than 3,000 research projects have been conducted on Mindfulness Training over the past ten years. A number of these have been within corporations using Mindfulness practice, some with TPP programs. The results are conclusive and show that among other effects practitioners:

- ✓ Develop significantly improved self and others/team-awareness
- ✓ develop a highly increased ability to focus and concentrate
- ✓ have 30% less physiological and mental stress symptoms
- ✓ have 40% less irritation and anger
- ✓ experience a 35% increase in sleep quality
- ✓ experience 50% less mood swings
- ✓ have an increased immune defense system
- ✓ show lower blood pressure
- ✓ have slower heart rates
- ✓ start acting instead of reacting
- ✓ take more personal accountability for their world
- ✓ Be able to focus on what they choose with less distraction
- ✓ experience more energy, general well-being and happiness

Apart from the above, the following outcomes have been observed for managers and leaders undertaking the programs:

- ✓ Improved focus and attention enabling them to be more “present” with staff
- ✓ Improved self-awareness enabling them to better support the vision, mission and values of the organisation
- ✓ Improved ability to envision and maintain clarity related to goals
- ✓ Improved ability to adapt positively to change
- ✓ Enhanced ability to provide effective feedback and guidance to team members
- ✓ Increased capacity to deal with stress and work related pressures
- ✓ Increased personal efficiency and productivity providing them with more time for themselves and their teams
- ✓ Improved collaboration and innovation starting with the senior team and filtering down to all staff
- ✓ Improved staff morale and perceptions of the company and its leadership

The overall end result is an increase in both performance and happiness on an individual as well as an organizational level.

To achieve these results a regular exercise of mindfulness training is required as part of the work. As little as 10-15 minutes daily practice over 6 – 8 weeks produces measureable effects among participants. All our programs offer an opportunity to get started with simple but life-changing practices and begin to enjoy the effects described above. The aims of the shorter programs are partly to “inspire” participants to conduct regular practices which are designed to build resilience, balance and effectiveness. It should be understood that, like building muscle or getting physically fit, rewiring the brain to change default

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patterns of relating to such things as stress is a process rather than an event, and most neuroscientist believe that 8 weeks or regular practice is normally required to see visible and measurable impact.

### **2.7.3 POTENTIAL PROJECT PROGRAMS**

We offer a variety of keynote style talks, 1.5, 2, 3, half-day, full-day workshops together with a 2-3 day Mindful Leadership program. The flagship program, on which much of the scientific research is based, is a 4 month process beginning with a 2 hour “kick off” and followed by 8 weekly 1.5 hour workshops with 2 monthly 1.5 hour follow-ups.

These are the subject of a separate discussion document available on request.

# APPENDIX

## 3 THE TRANSCEND ADVANTAGE

### 3.1 MATURE, EVIDENCE-BASED CONTENT

Our program stand on strong academic and scientific shoulders and have been continuously evolved over the past 10 years to be responsive to the particular demands of the changing and busy regional work-scape. Together with our delivery partners, our various programs have been delivered to over 90,000 people in 25 countries, in multiple languages and to nearly every industry.

### 3.2 UNIQUELY EXPERIENCED COACHES, FACILITATORS AND TRAINERS

We have extensive experience in helping managers be effective in the unique context of organisations, this includes both training and follow up coaching with leaders at all levels in organisations. From instructors passionate about developing excellent and successful managers with meaningful regional executive leadership experience in Hong Kong, Greater China, North Asia and ASEAN regions. We have delivery capacity in English, Cantonese, Mandarin and Korean.

All our coaches and facilitators, apart from holding higher level certification from the ICF, also have a strong leadership background and are certified in a variety of psychological assessment tools. Our people are also trained in the neuroscience of change and in secular presence based methodologies, including mindfulness, at the highest level.

### 3.3 FLEXIBILITY

We are experienced designers of robust and effective training in multiple areas and can readily adapt or create to meet your needs. We are based regionally and can travel and adjust schedules to suit.

## 4 WHO BENEFITS?

Coaching, Coaching skills, mental balance and Emotional Intelligence and attentional management are becoming increasingly valued as they help to create a culture of engagement, accountability, growth and empowerment both for managers and their reports. Such skills will ensure that participants can effectively guide themselves and their employees in their development and help create a culture of individual ownership, accountability and responsibility for both performance and development.

What you want?	What you may be getting?
<ul style="list-style-type: none"> <li>• OAR (Ownership, accountability, responsibility)</li> <li>• Empowered, effective, focused employees</li> <li>• High engagement</li> <li>• Fire preventers</li> <li>• Goal / solutions orientation</li> </ul>	<ul style="list-style-type: none"> <li>• BED (Blame, excuses, denial)</li> <li>• Missed deadlines, mistakes, misunderstandings</li> <li>• Overwhelm, low “will”</li> <li>• Fire fighters</li> <li>• Problem orientation</li> </ul>

<ul style="list-style-type: none"> <li>• Creativity</li> <li>• Emotional and mental balance</li> <li>• Agile in the face of rapid change</li> <li>• Appreciative of diverse views – integrating opposites</li> <li>• “Comfort with discomfort”</li> </ul>	<ul style="list-style-type: none"> <li>• Stuck in “habitual perceptions”, old patterns and habits.</li> <li>• Reactivity, inappropriate use of emotion, poor reactions to stress</li> <li>• Threatened and resistant</li> <li>• Stuck in bias. Negative and resistant to feedback. Threatened by disagreement.</li> <li>• Avoids facing difficulties. Looks for easy solutions and answers</li> </ul>
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## 4.1 WHAT PARTICIPANTS ARE SAYING – A SELECTION OF COMMENTS

Below is a sample of comments on a number of our programs. Testimonials and case studies are also available on request.

**NOTE:** Comments have been unfiltered or adjusted for grammatical or other errors.

- Well-outlined and executed
- The lights came on, thanks so much
- Content was relevant, interesting, well-planned, concepts introduced and expanded with time to digest
- It's the first training that I did not check my email, or even want to
- Invaluable
- The practical examples and group activities to put the learned content into practice
- Informative and professional
- It keep everyone awake and also the various activities ensure no one could check out from the session
- Very beautifully made people convinced of self-realization. Program is a great motivator a great mixture of fun, learning's, sharing experiences and innovative.
- I am a better person as a result of my engagement with Transcend and its offerings
- Outstanding facilitators, excellent and knowledgeable
- The facilitators are credible and reliable
- Great interaction and easy to understand and apply techniques.
- Very good background understanding and very well facilitated
- A very good coach and listens well. Understands our thoughts and steps down to our level to help us understand the subject.
- Quoting examples or situations that are easy to understand and link to training materials.
- Great educator & such a down to earth approach from people who are & have been from the heights of business world.
- Very informative & knowledgeable. Topics for learning related very effectively and in a simplistic way for all to understand.
- Knowledgeable, very patient and always gives feedback immediately.
- Very good facilitator to encourage everyone to participate and let us relate each topic to our real life situations. His way of teaching was very practical and adaptable to work rather than just putting more knowledge in me! I already had enough of that and I still was stuck!
- This program has been one of the most transformative experiences of my life.
- This program is certainly one of the most profound things that I have done in my life! – Goals! That is what it all boils down to. I realise I have the absolute power to make the choice that best serve my goals - at any given moment of choice. It is a simple thing to say - moment of choice - and easy enough to understand it literally but it is amazingly deep and meaningful once I tried to apply that concept to EVERY single decision I make (especially those that I didn't think I could control - most of which were actually disguised as habits) at every single moment. Your explanation of mindfulness in a corporate context helped tremendously and through some of the changes I have already made, I realise its just a thing. We attach and inject emotions and interpretations into stuff and all of a sudden it becomes something more than it is. Thank you so much for changing my life and my transforming my work!
- I have become completely "un-stuck"!

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