

FEATHERSTONE

g r o u p

EXECUTIVE COACHING

Overview of Services
Sarah Bodner, Ph.D.



FEATHERSTONE

g r o u p

Featherstone Group is a boutique coaching and consulting firm focused on equipping leaders for success.

Featherstone Group is coach, trusted advisor, and confidant to executives leading in changing environments. Clients are Fortune 500 leaders in the fashion, chemical, medical, energy, banking, and airline industries.

As a small company, we provide:

- Highly customized approach & tools to meet client needs.
- Broad skills usually only found in large consulting firms.
- Deep expertise built on combined academic and 20+ years of practical experience in and with corporations.

The company was founded by and is solely owned and managed by Sarah Bodner, PhD. She is based in Texas but serves clients across the continental United States.

Founded in 2014
San Antonio based LLC
Woman owned & managed
CAGE: 85J59 | D&B DUNS: 081241811
NAICS Codes: 541611, 541612, 611430
NGIP CODES: 91832, 91838, 91875, 91883

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SERVICES

Thought Partner

Serving as a trusted advisor to executives who are in a new role, are working through significant business issues, or are leading strategic change.

Executive Coaching

High impact coaching for senior leaders new to a role, succession candidates preparing for a higher level, and challenged executives needing to reset their leadership brand.

Executive Development

The Executive Lab is an executive education program focused on growing the skills of executives. It is not designed to "fix" problem leaders, but rather to help successful leaders grow to their fullest capability. There are in-person and virtual options.

Developing Women Leaders

Lady Boss is a program targeted to male leaders that provides tools to support the development and career advancement of women leaders and high potentials.

Strategic Planning

Facilitating executive teams in crafting, reviewing, and revising strategy so that it is clearly defined and aligned throughout the organization.

Speaking

Interactive presentations & workshops addressing head-on the often-uncomfortable realities of leadership and providing practical tools to help the audience lead in a way that is healthy and constructive

Equipping Leaders for Success



SARAH BODNER, PHD

Sarah Bodner, Ph.D. equips leaders to work through the complex and difficult realities of executive leadership. She is their confidant & advisor.

She takes a very real-world approach, dealing with what is and not what should be as she guides executives in the hard, sometimes seemingly impossible, work of leadership. Teaching them to be politically savvy, to wield power with grace, and to deal with the ugly in healthy ways.

Her “superpower” is the ability to help executives untangle highly complex challenges to objectively separate conflating issues to create clarity, identify the root issues, and discover a simplified path forward.

Dr Bodner is a coach, trusted advisor, and confidant to corporate executives across a variety of industries. This vantage point has given her a deep understanding of the executive reality and what it takes to survive and thrive at the highest levels of leadership.

COACHING APPROACH

Dr. Bodner only coaches 6 executive clients individually at any given time, allowing her to fully focus on each clients’ unique situation and needs.

As a coach, she is non-threatening and not ego driven, allowing executives to let down their guard and yet, she shares tough truths and doesn’t pull punches as she helps clients wrestle with challenges. Ultimately, Sarah works to balance being both a “safe place” and the “challenger.”

Coaching in a vacuum, where coach and client are the only two who know the work being done, is not ideal. As such, Dr. Bodner wants to periodically meet with the client's leader/champion to gain context on the client’s situation and to provide guidance on how that leader can best provide support. The client is always aware of, and consents to the conversations.

CREDENTIALS

Executive Leadership within a highly regulated and risk adverse organization that was having to change in response to immense technological, political, and financial pressures.

Leadership of corporate talent management, strategic change, employee engagement, economic development, internal & external communications as well as crisis management and stakeholder relations.

Ph.D. in Industrial / Organizational Psychology



SPECIALIZED COACHING

- Executives in Transition
- Leading Strategy & Change
- Re-Setting Leader Approach & Brand
- Learning How To Be A (Good) Executive





COACHING PHILOSOPHY

Dr Bodner is a pragmatic idealist. She believes that leadership is a calling with deep responsibility. But her eyes are wide open to the reality that top executive levels are rife with toxic leaders.

When healthy leaders rise to the executive ranks, they struggle to operate in that environment, so they flame out, burn out, or get pushed out.

Dr Bodner coaches healthy leaders to help them survive & thrive in their less than ideal reality. She also coaches toxic leaders to reduce the harm they are creating.

The end goal is always stronger and better leadership for their span of care.

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EXECUTIVE COACH & THOUGHT PARTNER

Dr Bodner works to balance being both the “safe place” where the client can be vulnerable and the “challenger” addressing tough truths and pushing the client to do the hard, and sometimes seemingly impossible, work of leadership.

The purpose of coaching relationship usually takes one of three forms:

1

EXECUTIVE RE-SET

Leaders can become so focused on driving toward results that they lose sight of the softer side of leadership. This can lead to interpersonal challenges, severely limiting the effectiveness of the leader. Dr. Bodner has an affinity for, and is particularly skilled at, supporting executives who are in a difficult situation, or who may be viewed as challenging. She enjoys helping them to grow into their fullest capability.

This form of coaching is intended for executives who are need to:

- Address challenges limiting their effectiveness as a leader
- Adjust their leadership approach, reputation, and/or relationships

2

EXECUTIVE TRANSITION

GROWTH: Transitioning to higher-level roles requires a leader to operate differently, and often to alter the skills and approaches which have led to their success thus far. Dr Bodner works with executives transitioning to higher level roles, providing insight and guidance on adapting their leadership brand and operating more strategically to help them be effective at higher levels.

This coaching is for senior level leaders (or soon to be) who are:

- Learning to operate and be successful at higher levels

ASSIMILATION: When executives step into a new organization, the pressure and expectations are high. Dr. Bodner walks alongside executives as they move into new organizations and/or roles, providing insight and guidance as they determine the path to success, not just for themselves, but for their new organization.

This coaching is for executives who are:

- Stepping into a new company

3

THOUGHT PARTNER

Dr. Bodner serves as an objective & confidential thought partner to high-functioning executives leading in changing environments.

This type of coaching is ideal for executives who are:

- Leading strategic change
- Working through significant business issues
- Mitigating internal and external issues to alter brand reputation

PRICING

FORMAL EXECUTIVE COACHING

\$25,000 /year

ASSESSMENT

- Verbal 360
- 2-3 days of on-site observation and interaction (if feasible)

COACHING

- Objective confidant, advisor, and coach
- Jointly identify areas of focus for coaching
- Scheduled coaching sessions 2 to 4 times a month
- Impromptu coaching sessions as needed for key issues
- Tools to work through complex & difficult executive realities

PERIPHERAL SUPPORT

- Monthly conversations with the client's boss or key sponsor
- Up to 2 days of on-site consulting and/or facilitation

INFORMAL EXECUTIVE COACHING

\$20,000 /year

DISCREET THOUGHT PARTNER

- Objective confidant, advisor, and coach
- Objective sounding board to wrestle with tough issues
- Source of honest feedback and safe place to be vulnerable
- Tools to work through complex & difficult executive realities

- Includes sessions 2 to 4 times a month and impromptu support
- Assessment is optional (but strongly recommended)
- Does not include peripheral support

THE EXECUTIVE LAB

EXECUTIVE EDUCATION PROGRAM

\$15,000 /participant

- 12-month program (all real-time)
- Cohort of senior leaders capped at 5 members
- Highly applicable curriculum and tools for executive level leaders
- Ongoing situational advice and coaching from peers and Dr Bodner
- Mix of videoconference (twice a month) and in-person (two 2-day sessions)
- Participants from different industries to create privacy and maximize learning

EXECUTIVE ASSIMILATION

FIRST YEAR WALK-ALONG

\$15,000 /year

- Structured executive transition process
- 10 coaching sessions in the first 100 days
- Monthly coaching sessions for the subsequent 9 months
- Quarterly check-ins with the client's boss or key sponsor

NOTE: Does not include assessment

TRAVEL

Should travel be necessary, Featherstone Group will invoice for reimbursement of reasonable travel-related expenses such as airfare, meals, and lodging.

FORMAL EXECUTIVE COACHING

INDIVIDUALLY TAILORED SUPPORT

ASSESSMENT

Most coaching engagements begin with an assessment to develop an understanding of the client and their situation. This usually includes:

- Verbal 360 to gather insights and perceptions held by peers, superiors, and staff.
- When feasible, on-site shadowing for 2-3 days to gain context on the client's work world, their leadership style, and their interactions with others.
- Depending on the client, a personality inventory may be used for additional insight.

Coaching is not a cure-all for all the challenges leaders face. That would be like attempting to “boil the ocean.” It is important that the coach, client, and sponsor are all aware of and in alignment around expectations and desired outcomes.

Thus, after the assessment phase, the client and coach mutually agree on the areas of focus. These are often shared with the client's boss / sponsor to ensure alignment around expectations and desired outcomes.

ONE-ON-ONE COACHING

Scheduled one-on-one conversations, usually via videoconference, occur weekly or bi-weekly, depending on client needs.

Because business and leadership needs cannot always be predicted or scheduled, Dr. Bodner is available as needed outside of scheduled sessions.

During coaching sessions, Dr. Bodner works to balance being both a “safe place” where the client can be vulnerable and the “challenger” who pushes and supports the client as they take on the hard, sometimes seemingly impossible, work of leadership.

CONSULTATIVE APPROACH

Dr. Bodner takes a consultative approach to coaching. She doesn't just listen to the client talk; she works to develop a full understanding of client's needs and provides highly customized tools, resources, and support.

Her high-touch approach allows her, for some engagements, to provide on-site hands-on consulting and/or facilitation when needed.

PERIPHERAL SUPPORT

It is not helpful to coach a client in a vacuum where they are the only ones who know what they are working on. Active support from their boss, board, or champion is critical for success.

As such, Dr. Bodner meets with the client's boss, board designee, or champion monthly; to provide the Dr. Bodner with insight & context and to help the sponsor understand how to best support the client.

CONFIDENTIALITY

Confidentiality is crucial to successful coaching. Areas of focus for the coaching engagement and goals to help improve the client's leadership effectiveness will be shared with the client's management.

The client will always know about any conversations, key discussion points, and give permission to share any additional information with their management.

Coaching often involves being in sensitive meetings or secure locations. Dr. Bodner works to follow all safety and security protocols and will sign an NDA, if needed, to protect sensitive information.

INFORMAL EXECUTIVE COACHING

OBJECTIVE THOUGHT PARTNER

Every leader needs someone to talk to, but finding an internal confidant can be extremely difficult once leaders rise to a certain level in the hierarchy. And the higher up a leader gets, the more isolated they become. The lack of honest feedback and guidance can be detrimental.

As a Thought Partner, Dr Bodner supports high-functioning executives as an objective:

CONFIDANT

Helping executives work through the inevitable anxiety, anger, irritation, uncertainty, confusion, frustration, and fear that comes with high level leadership.

ADVISOR

Acting as a sounding board to help executives wrestle with tough issues and untangling complex issues to create clarity and a path forward.

COACH

Taking a real-world approach, dealing with what is and not what should be, to help executives be politically savvy, wield power with grace, and deal with the ugly in a healthy way.

*Thought Partner support is part of all formal coaching engagements.
It can also be carved out and provided as an informal coaching engagement.*

INFORMAL

Independent

Formal Coaching engagements are often initiated, coordinated by, and involve some degree of visibility from the client's corporation.

Informal Thought Partner support is often initiated directly by clients who want to work with a coach in a more discreet arrangement.

Looser Structure

Formal Coaching engagements have a structure and cadence that require assessment, peripheral support, and communication with HR / Management.

Informal Thought Partner support allows the client to work with Dr Bodner without the formal requirements and structure. A verbal 360 is strongly suggested, and in some cases required, for an on-going engagement.

THE EXECUTIVE LAB

SMALL GROUP EXECUTIVE EDUCATION PROGRAM

The Executive Lab is a year-long executive education program to help leaders succeed in the executive ranks. It provides both new and experienced executives with the skills and tools to grow into stronger, healthier, more capable leaders who adjust faster to executive level expectations.

SMALL GROUP

Each Lab is limited to 5 members to maximize learning & growth. The small group of like-minded leaders help each other apply existing leadership skills in new ways and developing new tactics and strategies for tackling challenges.

APPLIED LEARNING

The Lab teaches practical tools that work in the real world. Without overtaxing an already busy schedule, participants have the time and space to learn, apply, and debrief while receiving ongoing support and tailored, situational advice over a substantial period of time (1 year).

PREVENT FLAMOUT & BURNOUT

Participants adjust faster to executive level expectations and priorities by learning not only what executives SHOULD do, but HOW to do those things. They learn how to make the most impact and operate at the highest levels without sacrificing wellbeing or values.

TOPICS

Leadership

Leadership Transitions
Emotional Intelligence
Resilience & Agility
Ego Management

Relationships

Power
Influence
Political Savvy
Trust & Authenticity

Change

Leading Change
Strategic Communication
Change Adept Organizations

Strategy

Strategic Mindset
Strategic Planning
Executing Strategy

Reputation

Leadership Brand
Executive Presence
Intent / Impact Gap
Recovering From A Mis-Step

Talent

Accountability
Empowerment & Coaching
Engagement & Talent Strategy
Creating A Healthy Organization

The Lab is not designed to "fix" problem leaders,
but rather to help successful senior level leaders grow to their fullest capability.

EXECUTIVE ASSIMILATION

FIRST YEAR WALK ALONG

When executives step into a new organization, the pressure and expectations are high. Executives feel the pressure as they have quite a bit riding on their success in their new role. And companies have incredibly high expectations of the new executive, whom they selected to lead a critical part of their business. The stakes are high.

Transitioning to new organizations and/or higher-level roles requires a leader to operate differently, and often to alter the approaches which have previously led to their success.

They must adapt to the role and the organization rather than trying (almost always unsuccessfully) to make the organization adapt to his or her leadership style and methodologies.

It is critical that new (or newly promoted) executives begin with a full understanding of stakeholder expectations, have the knowledge & skills to navigate the corporate culture, and are armed with context that helps them avoid significant mis-steps.

Dr. Bodner walks alongside executives as they step into new organizations and/or roles, providing insight and guidance as they determine the path to success, not just for themselves, but for their new organization.

Structured activities along with executive coaching are combined to help executives:

LEARN FROM THE PAST

Identify adjustments the leader needs to make to be successful in this new role

PREPARE FOR THE ROLE

Prepare mentally for the transition and thoughtfully develop a leadership brand

MEET, LISTEN, & LEARN

Gain a holistic understanding of the business unit and expectations of the key stakeholders

BUILD STRATEGIC RELATIONSHIPS

Understand the political and power dynamics and to begin building trust and influence

ASSESS & PLAN

Identify opportunities for short-term and long-term initiatives and develop a plan to address business needs

IMPLEMENT & OPTIMIZE

Execute and support initiatives that will have the biggest impact on business performance

TERMS & CONDITIONS

1. **FEES & EXPENSES:** No additional fees will be charged to Client without the Client's express written consent or unless specified in the Statement of Work. No extra charges will be paid by Client for Services provided by Featherstone Group at night or on legal holidays.

When the following third-party expenses are necessary, Featherstone Group will invoice Client for such Expenses:

- Reasonable travel-related expenses, such as airfare, transportation, meals, and lodging incurred by Featherstone Group in performance of the services.
- Incidental business or project-related expenses such as printing, meeting location, av equipment, etc. associated with delivery of services.

2. **INVOICES:** Invoices for coaching engagements will be submitted to Client at the beginning of the engagement. Enrollment in the Executive Lab is conditional up on receipt of full payment. Invoices for Expenses incurred will be submitted monthly as they are incurred.

Upon any written request by Client to audit the documentation supporting any Expenses, Featherstone Group will provide Client with access to documentation to verify the accuracy and appropriateness of all such Expenses invoiced to Client.

3. **PAYMENT TERMS:** Client shall pay all invoices within fifteen (15) days of date stated on invoice.

4. **CONFIDENTIALITY:** Any and all Client information that Featherstone Group encounters or has access to in the course of the engagement will be held in strict confidence and will not be communicated, disclosed, transferred or otherwise made available to any third party. Featherstone Group will exercise care to prevent unauthorized disclosure or use of any information, confidential or otherwise.

Featherstone Group will not act on or use any information related to Client and its business (real or potential) for any purpose other than the engagement.

Featherstone Group may disclose information it encounters when required by law or by demand from court order. Should Featherstone be legally compelled to disclose information, it will promptly provide written notice to Client.

5. **CLIENT REFERENCE:** Featherstone Group may include Client's name and/or logo on Featherstone Group's list of customers, including but not limited to lists and case studies for promotional purposes. Featherstone Group retains the right to use materials created for Client for promotional purposes, excluding any Client proprietary or confidential information.

6. **WORK PRODUCT & RIGHTS:** Client shall own all right, title and interest, including but not limited to all copyright, patent, trade secret, trademark, service mark, and all other intellectual property belonging to Client. All Information furnished to Featherstone Group by Client shall remain the property of Client. Featherstone Group irrevocably and unconditionally revokes all right, title, and interest to any and all Client data or information without further consideration.

Client is not authorized to separate any Featherstone Group intellectual property from the engagement in which it is incorporated. Featherstone Group retains all rights, ownership, and interest of the full and complete intellectual property, concepts, content, and materials of all prior works that may be provided to Client during the engagement as well as all intellectual property invented or otherwise created by Featherstone Group during the engagement.

Featherstone Group's copyright does not attach to any information that Client owns or supplies during the engagement. And Client intellectual property, any Client data, and any intellectual property created using or otherwise based on Client data or intellectual property.

Client is authorized to use Featherstone Group intellectual property, concepts, content, and materials provided during the engagement in the course of an individual client's work as an executive. However, that information and/or materials may not be included into systemic training, procedures, or systems without prior written approval from Featherstone Group.

7. **INSURANCE:** Featherstone Group will purchase from and maintain, with a reputable company or companies, professional liability insurance with a minimum limit of \$1,000,000 and, if applicable, automobile liability insurance in a minimum amount of \$1,000,000.
8. **DAMAGES:** Featherstone Group makes no warranties, express or implied, on any work product including (without limitation) any implied warranties of merchantability or fitness for a particular purpose. In no event shall Featherstone Group be responsible to client for incidental, special or consequential damages of any kind regardless of whether the same are foreseeable.

However, Featherstone Group's maximum cumulative liability relative to all claims and liabilities, including that with respect to direct damages and obligations under any indemnity, whether or not insured, will be capped at and shall not exceed fees paid for the work product giving rise to the claim or liability.

9. **REMEDY:** Featherstone Group's sole responsibility, and Client's sole remedy, for any defect in the Work Product shall be for Featherstone Group to revise the Work Product in accordance with this Agreement.