

SENIOR MANAGEMENT

HUMAN RESOURCES

SUPERVISING MANAGERS

PARTICIPANTS

TECHNIQUES



PINNACLE

Techniques Measured and Covered in the Pinnacle™ Success Program:

- **Goal Setting** – How to use the goal setting process to achieve stretch goals and to challenge the organization to outperform and achieve “out of the box” results.
- **Strategic Alignment** – Development of Strategic plan and the alignment necessary to create commitment to the success of your business, function(s), or department.
- **Coaching & Talent Management** – “Surrounding Yourself with the Best People” and Succession Planning – Ensuring a system is in place or being fully utilized to develop teams that give your company a competitive advantage.
- **Execution** – How to ensure teamwork, Operational Excellence, and Alignment to deliver excellent results and provide a superior Leadership model for others to follow.
- **Delegation** – A comprehensive process to delegating critical work to your subordinates so that your team provides excellent results, quickly respond to opportunities and gets the development they need to progress onto important leadership roles.
- **Communications** – How to communicate in a manner that builds teamwork, commitment, and collaboration to deliver outstanding results.
- **Teamwork** – the maturity / self confidence to be a great follower/teammate even when your tendency is to lead. How to sow the seeds for great collaboration.



“The 360° feedback accompanied by a public workshop atmosphere ensures objectiveness and honesty. If you are willing, this can be a powerful three days!”
– Kevin Ward, Operations Consultant, Kimberly-Clark Corporation

“Having received a great deal of leadership and managerial training, I was particularly impressed with the value of the Performex workshop. The key to success, I attribute to learning exactly who I am as seen by peers, subordinates and direct reports. The 360° feedback will assist all leaders in how to be more effective with your staff.”
– Jeff Carter, Director of Sales, Vistana Development

“Fantastic program! Great real world examples. Good energy from the facilitators. The session was a great opportunity for me to think about what I want to do going forward and then put that into action”
– Jesse Bryson, Southern California Edison

“You don’t have to be a large firm with multiple layers of management to receive value in this program. Large or small, the process is the same. Thank you.”
– Jim Lawson, Lawson Marketing Group



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For the Participant

Participants benefit from the Pinnacle™ Excellence Program in many ways, such as the following:

Having a Real Impact

You will learn to maximize your strengths and improve challenge areas with guidance delivered by our certified facilitators and coaches. All of our facilitators are former senior executives who have had outstanding career success and have first-hand knowledge of Pinnacle™ subject matter. They have “been there and done that.” Plus, they are deeply rooted in the latest content from today’s top leadership development experts. Together, we give you an unvarnished view of how you stack up against today’s corporate leaders. We then tailor the instruction and support that you need to address your gaps, and we capitalize on your strengths so that you can perform at a higher level and be recognized for it.



Career Advancement

Insight and capabilities learned from the 12-month Pinnacle™ Excellence Program will give you the confidence to tackle challenging assignments that are key to career advancement. Many of our past participants tell us that the skills and insight they received in Performex™ programs made a major difference in their career satisfaction and long-term success, both immediately and years after they participated in the program.

Receiving Clarity for Difficult-to-Grasp Concepts

Many leaders perform their current job well enough, but they struggle to know what is needed to advance to the next career level. They want to be more strategic, build better teams, and deliver “flawless” execution, but they can’t figure out what components they are missing. They may have been given some vague feedback on past performance reviews or 360° reports, but they don’t have the clarity to do anything. Pinnacle™ helps you see the opportunities inherent in your natural skill set and in your career situation, and we give you the ability to seize the day!

Get an Edge Just Like Professional Athletes

Today’s top sports stars get excellent feedback, instruction, and coaching. Even the best athletes continually work on their performance, skills, and execution. Why not give yourself the same advantages in your career? Pinnacle’s certified coaches do more than just advise program participants on leadership skills; they also provide ongoing support and feedback to keep you motivated and on track.

Mastering Your Own Destiny

Do you ever wonder why some people in your company are promoted like clockwork and why others are stifled early in their career? The Pinnacle™ Excellence Program shows how you are measuring up with the other top managers in your organization and gives you the means of attaining the same skill level. Take your strengths to the next level and realize your potential. Why pass it up?

“This was a rare opportunity to remove myself from the flow, be on retreat, reflect, and re-engineer myself.”

– Tim Brandon, Applera Corporation

“Can’t wait to get back and try using the tools. Absolutely enjoyed the entire process.”

– Mary McManigle, Global Access



For the Participant's Supervising Manager

For managers, getting the most out of high potential and experienced managers is critical to achieving top results in today's ultra-lean organizations. The Pinnacle™ Excellence Program can assist managers with accomplishing the following:

Accelerate the Learning Curve

The age-old saying, "There is no substitute for experience," is no-longer acceptable. Fast changing organizations can't wait for the gradual wisdom cultivated through apprenticeship. By providing leaders with deep insight into how their skills stack up against the top leaders in business today and the means to practice improved skills in a safe environment, the Pinnacle™ Excellence Program grounds high-potential participants with the knowledge of where they excel and where they need to focus on improvement. Combining this insight with two intensive instructional workshops and coaching from Performex™ certified coaches greatly truncates the developmental cycle. Pinnacle™ shortens the readiness time for key employees to yield excellent results by leading new functions, major projects, struggling business units, and other difficult or risky assignments.



Driving Learning and Results

The aggressive action plans developed during the first workshop include accomplishing major business objectives of each participant. Performex™ facilitators and certified coaches help weave the newly acquired and enhanced skills into the participant's job assignment in such a way as to ensure that new skills are permanently assimilated and the business goals accomplished.

Augmenting Your Own Coaching and Development Efforts

Sending your employees through the Pinnacle™ Excellence Program is not just for managers who are inexperienced coaches or don't have time to coach— (although we can and do help managers with such issues). Most often, it is accomplished leaders/coaches who sponsor their rising-star employees to attend the Pinnacle™ Excellence Program, because they know that investing in getting even better results from high-potential employees has the highest pay-off. Performex™ has been recognized as the specialist for developing business leaders for over 30 years.

Using the Most Cost Effective Solution

The Pinnacle™ Excellence Program provides the leverage, reach, and staying power normal coaching engagements cannot provide at an exceptional price point. Our Performex™ certified coaches don't just ask provocative questions; they are skilled in how to implement our extensive "Pinnacle Tool Box" that contains time-tested and state-of-the-art leadership techniques utilized by top corporate executives.

Building a Better, More Loyal Team

Our client companies and participants' loyalty sets us apart from our competitors. We constantly hear back from our client companies that their participants thank them when they return from the first workshop and throughout the year-long process cycle. Our best customers are former Performex™ program participants who are now in the position of sending their own employees through our program.



"Definitely the best management training I've ever attended. I was immediately able to apply the skills acquired in the initial workshop when I returned to work. Overall a great experience."

– Doug Campbell, Southern California Edison

"The Performex program has been a fantastic experience that has provided me insights into my management style as well as a foundation for building my management and leadership skills."

– Dan Traub, Yahoo, Inc. / Overture

"Performex provided excellent and insightful training. It is a great management training."

– Merle Isgett, Interim Legal Services / Spherion Corporation



Human Resources Professional:

Developing high-potential leaders does not have to be a high-anxiety effort. Pinnacle™ Excellence Program delivers proven leadership development methods honed through over 30 years of “live” application and creates vivid results that allow the program package to “sell itself” through your organization.

Locked-in Learning Through an Integrated Approach

The Pinnacle™ Excellence Program makes your life easy by providing your high-potentials with an integrated talent development program, then ensures that what participants learn actually “sticks.” Pinnacle™ combines an intensive assessment with the world class content, professionally delivered, and the reinforcement and individual attention of extended coaching programs to drive “locked-in” learning and results.

Pinnacle’s tightly linked approach activates a 360° feedback report and other assessment data through a thorough interpretation process that helps each participant to internalize and positively act on feedback. Our training programs are tailored based on these participant assessments, and we extend workshop learning with ongoing coaching that helps participants to successfully practice what they’ve learned.

Taking Experienced Leaders and High Potential Candidates Further and Faster

Pinnacle™ is a powerful accelerant for your HR and Talent Management teams’ managerial and leadership development initiatives. The Pinnacle™ program shortens the readiness time for key employees to yield excellent results with managing new functions, major projects, struggling business units, and other difficult or risky assignments.

Reinforcing Existing Programs

Performex™ has a thirty-year history of reinforcing our clients’ current training and development programs—not replacing them. The Pinnacle™ Excellence Program taps into your existing programs and utilizes the nomenclature and concepts consistent with your culture and talent management strategies.

Retaining Top Talent

Executives repeatedly tell us that being selected to participate in the Performex™ program was their company’s most tangible demonstration of commitment to their key employees’ long-term growth. According to *Human Resource Executive* magazine (January/February 2011), “Holding onto High Performers is a top-of-mind concern at the nation’s largest companies as the economy rebounds.” Pinnacle™ provides immediate improvements in managerial performance while breeding loyalty among your key talent.

Installing the Program that Sells Itself

HR professionals often struggle to gain acceptance for even the best-intentioned development programs. Staff and line managers predictably complain about being pulled out of their core assignments to participate in programs that “don’t work.” The Pinnacle™ development program provides for immediate improvement back on the job, and as a result, we receive exceptional customer feedback, high satisfaction rates, and high repeat enrollment.

The Pinnacle™ program sells itself. Recently, a Fortune 500 CHRO told us, “I used to take a lot of ribbing from other managers about my team introducing yet another program. But by introducing the Performex™ program, we have gone from fielding complaints to making sure we sign up participants in the Pinnacle™ program at a fast enough pace to keep my internal customers happy!”



Leadership Development and Coaching for Those That Aspire to Senior Management

This is a personal effectiveness program designed to prepare successful managers for the "Corner Office."

Why You Should Choose the Pinnacle™ Excellence Program

The Pinnacle™ Excellence Program gives successful and high potential managers the skills necessary to obtain the exceptional results expected of senior leaders. The program is a unique, personalized development process, created by the Performex™ team after 30 years of success of preparing managers for leadership positions. To fill your leadership pipeline with a sufficient number of viable candidates for critical senior management positions, you must provide up-and-coming managers with special attention and on-going, in-depth coaching. Pinnacle™ offers the special attention and proven processes to fine tune already successful managers to be the leaders of tomorrow. Participating companies consistently emerge with greater bench strength and better leaders who can manage a larger span of control.

The following are the major reasons why companies choose Pinnacle™:

- Learning by Doing**
 The unique, year-long process integrates real world, on-the-job application of best-in-class leadership lessons and techniques. The coaching support which participants receive throughout the year ensures their continual commitment and allows them to achieve new leadership heights.
- Validated Approach**
 We use validated methodology based on quantitative and qualitative ROI measures from our proprietary 360° survey to customize the workshops, consultations, and executive coaching sessions—all focused on developing the insights and skills to promote productive relationships on the job.
- Time Tested Principles**
 The guiding principles behind the Pinnacle™ program have been time tested and yield real results.



Candidates for the Pinnacle™ program:

- Middle to senior level executives needing to transition to the mind set and skill base of successful senior level executives (Typically, Pinnacle™ participants are in their second managerial position and already lead a group of professionals.)
- High-potential executives that the organization wants to keep motivated and retain for tomorrow's leadership positions managing new functions, major projects, struggling business units, and other difficult or risky assignments
- Key executives tasked with turn-around situations needing an extra tool set to address their team's challenges
- High-potential employees with developmental needs beyond the typical leadership seminar
- Past participants of Performex™ programs, or other leadership programs, who are ready for further development and advancement
- Senior level executives wanting to both "recharge their batteries" and to help others gain from their own managerial experiences



Our unique, year-long customized process uses the same foundation for development as other well-known Performex™ programs—including 360° assessment, action planning, on-the-job-application, and recommitment—all of which take the participant to the next level of superior management leadership.

"I firmly believe the Performex program was extremely valuable to me. This program is rooted in solid organizational and team building techniques that can help managers enhance their strengths and become acutely aware of their leadership challenges.

I highly recommend this program for all top and middle managers..."

Phil Hardy, Aeromil Engineering



ADDITIONAL CLIENTS

CLIENTS INCLUDE

SUMMIT™ VS. PINNACLE™

PINNACLE™ COURSE & MODULE DESCRIPTIONS

12 MONTH PINNACLE™ EXCELLENCE PROGRAM PROCESS

Performex™ uses a field-validated training methodology that is tailored based on quantitative and qualitative measures from our proprietary 360° survey to deliver the insights and skills that make a real and lasting difference in your high-potential leaders' performance.

Assessment

The Pinnacle™ Excellence Program starts with an online, confidential 360° questionnaire to quantitatively rate key performance factors and collect candid qualitative written comments from each participant's colleagues. The survey focuses on key senior management leadership skills and techniques. It is the foundation of a year-long professional development process. The feedback is elicited from peers, co-workers, direct reports, the supervising manager, customers, and other relevant business associates.



Analysis

The data elicited by the Pinnacle™ 360° survey provides insights about the participant's individual management-leadership style and becomes the baseline for demonstrating change throughout the year. The Pinnacle™ executive coach analyzes the assessment information, searching for common threads that indicate the participant's strengths and challenge areas.

The 3 Day Workshop

This is an intensive workshop with up to 11 other participants, and it provides a dynamic environment to teach the skills, tools, and mindsets needed for exceptional leadership performance. During the first day of the workshop, each participant receives his/her 360°-degree feedback report containing diagnostic testing data. The deliverable from this process includes 2 aggressive action plans to achieve skill mastery and the business objectives to be achieved over the 12-month program's duration.

Summary Report Consultation

In this consultation, facilitated by the Pinnacle™ executive coach, the program participant debriefs their managing supervisor on the insights and commitments they made during the first workshop. The participant covers a summary of the 360° feedback report, his/her development goals, and the action

plan they will use to improve their skill set and obtain business results. The outcome of this meeting is an agreed upon and finalized personal action plan to be implemented back on the job.

Second Workshop

Held within six months following the initial workshop, this two-day program brings together attendees to review the participants' progress towards their business and personal development goals. Participants receive hands-on coaching, additional content, and peer-support to tackle any implementation challenges that they are experiencing back on the job. In addition, participants will develop a 5-10 year personal career goal by utilizing the detailed steps of a goal-setting process. The participants also get a second set of diagnostic results geared towards better understanding their work styles and insight on how to utilize this data to further advance their leadership skills.

Implementation Coaching and Mentoring

Our expert coaches provide focused one-on-one consulting to participants to assist them with implementing the leadership concepts and goals that they set out to master in their development plans. The coaches are subject matter experts, certified by the Performex™ leadership team, with training on how to use the "Performex Coaching Portal" to resolve each participant's challenge areas.

The Re-Survey/Consultation

The re-survey is taken 12 months after the initial workshop to measure improvement and help chart new development and career goals. Facilitated by the executive coach, the participant and the supervising manager compare the new results with the earlier survey results and focus on specific areas of change. This leads to new goals and a career development plan.

** All 360° survey information is collected confidentially and securely. All responses remain anonymous. Only the participant has full access to the full 360° feedback report.*



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PINNACLE™

COURSE & MODULE DESCRIPTIONS

Pinnacle™ enhances the foundational skills that business leaders and executives use every day, including strategic planning, execution, delegation, talent management, and coaching. Building these skills often provides the opportunity for very high potential leaders to “skip a chair” as they move into more senior leadership roles.

The initial three-day workshop begins with a proprietary 360° feedback report and the results of diagnostic testing. Key methods and models are discussed and practiced in individual and team activities. A case study provides real-life-like application of key course concepts throughout the program. You leave the workshop with a personal action plan to achieve business and career objectives and a toolkit of templates and models to help you use what you’ve learned.

Self Awareness and Discovery

The first step in becoming a better leader is to clearly see your strengths and challenges as others see them. You can then determine how to address what is negatively impacting your results and goals today and what is holding you back from achieving your career goals. This information becomes the foundation for the personal action plan you will develop throughout the rest of the initial workshop. In this module, you will:

- Describe your key leadership challenges;
- Receive 360° feedback specifically tailored to the skill sets addressed in Pinnacle™;
- Review the results of a diagnostic test that explains your work style and key drivers; and
- Review your highest and lowest effectiveness scores, a summary of your strengths and challenges, recommended personal development goals, and additional written comments.

Communication

Building support and collaborating with others are essential to achieving the desired business results. Excellent leaders effectively listen and gather feedback about how they and their team are doing. They build trust as they truthfully share their organization’s strengths and weaknesses and their plans to address these. Thus, in this module, you will:

- Communicate to build support and collaboration;
- Effectively listen and gather feedback about how you and your team are doing; and
- Truthfully communicate the strengths and weaknesses of the function/unit.

Strategic Planning and Alignment

One of the most difficult leadership challenges is making sure that one’s business objectives support the overall organizational strategy. This requires an overall understanding of sound strategic planning as well as alignment of functional objectives with shareholder expectations, customer expectations, and long-term business goals. In this module, you will:

- Describe a typical strategic planning process;
- Use a SWOT analysis;
- Link functional objectives and shareholder expectations;
- Align functional strategies/activities with customer expectations;
- Balance short & long term objectives; and
- Create a qualitative vision of business excellence.

Execution

Leaders are expected to get the right things done well in the shortest time possible with the least amount of resources. The excellent leader builds a strategic plan and then uses metrics, progress reviews, and a customer feedback loop to ensure that they achieve the desired outcome. They effectively communicate change in their organization and develop the needed execution drive and skills in others.

In this module, you will:

- Identify and implement adjustments needed to reach goals;
- Use progress updates with customers to build credibility for your organization; and
- Apply proven change communication approaches by:
 - o Sharing the vision and priorities of your function/unit and link those to the company’s strategies;
 - o Introducing and communicating substantial change to an organization; and
 - o Energizing/building commitment in the organization by explaining the whys and the urgent need.

Delegation

Delegating effectively means assigning major pieces of work in a way that maximizes results and develops others’ leadership and execution skills. In this module, you will:

- Balance criticality of results, individual development, and probability of success to select the best person to take on the task;
- Identify and manage skill gaps in the chosen person;
- Avoid common mistakes when delegating; and
- Challenge yourself and your leadership team to delegate more.

Talent Management and Coaching

The sign of a true leader is how they develop the talents of those around them. In this module, you will apply various talent management and coaching tools, and you will:

- Use a Nine-Box Tool to assess the talent in an organization;
- Lead a Talent Review Meeting to gather 360° input and identify key talent to develop as part of succession planning; and
- Prepare an Individual Development Plan.

Career Goal Setting

Excellent leaders are often described as highly motivated to achieve results—organizationally and personally. They have a clear view of where they are headed and what results and competencies will be expected from them along the way. This module focuses on creating an action plan to achieve excellence in your current role as well as prepare for your next role. In this module, you will:

- Define your five-year personal career goals, including compensation, responsibility, and critical quality of life factors;
- Identify how your current organizational role contributes to your near-term personal goals;
- Define excellence in your current role in terms of your behaviors and results;
- Define the executive competencies and business results expected in the next position you want to attain; and
- Develop an action plan for achieving business results as well as a personal development plan.

Advanced Leadership

Managers of managers must lead their organization to great results, flawless execution, and full engagement while building a sustainable world-class team. To do so, they need to ensure that Leadership essentials are practiced not only by themselves but also the managers within their organizations. In this module you will:

- Utilize the latest advances in the “neuroscience of leadership” by employing practical and concrete methods;
- Ensure your managers understand and practice the cornerstones of executive leadership.
- Develop the essential building block of fully engaged and committed teams – making emotional connections to unlock the talents and drive toward results in your team.

ADDITIONAL CLIENTS

CLIENTS INCLUDE

SUMMIT™ VS. PINNACLE™

The following checklist is a guide for potential candidates to determine if they should participate in the Summit™ or Pinnacle™ program. Circle the answer that best fits you or the potential participant. Participants typically should attend the program which they select for more than 6 answers.

Note: All past participants of the PEP / Summit™ program should enroll in Pinnacle™. If you have questions, contact the Performex™ registrar at (949) 759-1928.

Item	Background Information	Summit™	Pinnacle™
1	Are you the project manager?	Yes	No
2	Do you have managerial experience?	Up to Second	Third or more
3	What is your position title?	Manager/Director	Sr. Director or above
4	What is the total headcount that reports to you?	20 or less	21 or more
5	Is your current assignment "transformational"?	No	Yes
6	Do you have an advanced degree? (MBA, PhD, etc.)	No	Yes
7	Have you been in your current assignment less than 6 months?	Yes	No
8	Are you transitioning from an individual role to manager?	Yes	No
9	Does your job responsibility include strategy development?	No	Yes
10	Do you manage professionals?	No	Yes
11	How many years of experience as a manager do you have?	7 or less	More than 7

"I learned a great deal of valuable information about myself, my style of management, what people expect/need from me, and how to achieve it."
 – Brooke Perin, Honda R&D Americas, Inc.

"A wonderful opportunity for personal growth. If we don't get uncomfortable with ourselves now and then we don't grow."
 – Rosemary Lieberman,
 Southern California Edison

"I feel revived and energized by attending Performex. Transition from management to leadership is hard work breaking old paradigms. Performex has helped me plot a path forward to success."
 – Mark Puett, Tyco Healthcare

"These 3-days have helped me further identify how I can manage situations that I would ignore or care to avoid because they make me feel uncomfortable. My effectiveness is evaluated by others. Thank you for sending me!"
 – Regina Constine-Berdiel, Southern California Edison



ADDITIONAL CLIENTS

CLIENTS INCLUDE



Accuride



Georgia-Pacific



Qwest



Rockwell Automation



SONY PICTURES



Bank of America



Kimberly-Clark

Nestlé



TOYOTA



"...the feedback, together with your management model and coaching formed the foundation of a process of introspection that has yielded very positive results. Feedback is valuable, but grounded 360-degree feedback from your superiors, peers, and direct reports provides an unusual opportunity to see yourself as others see you and adjust your management habits and styles. I would recommend this program to any executive who is interested in becoming more effective and who has the wisdom to challenge themselves in their pursuit of self-improvement.

Thank you for a valuable workshop."

*– Linwood Thompson, Marcus & Millichap
Real Estate Investment Brokerage Company of Chicago*

"Good class! Very intensive but worth the time and focus – wished I was offered this program when I was in the PM role (earlier in my career)."

– Nicole Nguyen, The Capital Group



Anacomp, Inc.
Applied Biosystems
Art Center
Bergen Brunswig Corp.
California Commerce Bank
California Institute of Technology/
Pasadena
Canfield & Associates, Inc.
CBS Television
Citizen America Corp.
Community Bank
Compass Aerospace Corporation
Countrywide Funding
Cutera, Inc.
FFF Enterprises/Nufactor
Fleetwood Enterprises
Harvey Titanium/Division of
Rolled Alloys
Karl Storz Endoscopy
Learning Tree International
Litigation Sciences
Marcus & Millichap

Mizuho Corporate Bank, Ltd.
National Pen Corporation
Newark Pacific
Nihon Kohden America, Inc.
OneSource Distributors
Orange County Transit Authority
Overture/Yahoo
PacifiCare Health Systems
Parsons Process Group
Presto Foods
Road Runner Sports, Inc.
Southern California Edison
TDK Electronic Corporation
Tembec, Inc./Pine Falls/Spruce Falls
Tri City Medical Center
TRW Technar, Inc.
Unitek Corporation/3M
UNOCAL Corporation
Varco Drilling
Vistana Development
Walters Wholesale Electric
Xerox – Tektronix/Office Printing



"This training was unique in the sense of driving problem solving with coaches and the follow up. Looking forward to the next session and coaching."
– Robert Herman, Kimberly-Clark Corporation

"Great program, great coaches, brutal & honest feedback is appreciated."
– Edwin Lanfranco, Southern California Edison

"One of the most influential management tools I have ever experienced in my career. Truly a life-changing program."
– Mike Teed, Scottsdale Plaza Resort

"My experience with the Performex program has had an incredibly positive affect on my ability to lead and mentor my staff. The program single-handedly helped me shift the perceptions I convey from being harsh and too aggressive to being caring yet still a strong leader."
Melissa Perales, Quest Diagnostics