

Human Resource Professionals

Participant's Supervising Manager

Participants

Benefits of Summit Excellence Program



## Real Results

- Changes “Potential” into “High Performance”
- Transforms subject matter experts into superior managers and leaders
- Individualized for maximum acceptance and impact
- Deeply engages participants through use of Leadership 3.0 technologies
- Accelerates skill acquisition, increasing the speed at which managers succeed at challenging assignments
- Augments your company’s skill development programs, does not replace them
- Turns participants’ development needs into strengths, and strengths into high performance
- Facilitates participants’ upward mobility: job growth and promotions
- Helps companies fill the middle-management strength gap faster, more effectively
- Enhances emotional intelligence for on-the-job success
- Fosters vital organizational good will and loyalty among participants

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**Rosemary Lieberman,  
Southern California Edison**

"Very applicable. Helped me move into my new position. Affirmed what I thought I should be doing in my new role."



**Brandon Echols, Ossur**

"I really enjoyed the workshop last week! I'm very excited to have John as a coach. In the short amount of time we worked together he already earned my trust and has inspired me. You are amazing! Your knowledge and experience absolutely validates and drives home the Performex methodology."

**Lisa Morden, Kimberly-Clark**

"Instructors were both highly skilled with regards to content and could relate to real life challenges – excellent!"





## Built for Your Career Advancement

You have developed superb expertise in your field and are considered a successful individual performer and manager within your area of specialty. To advance in your company, though, your next step is to prove that you can lead others successfully. As you have probably discovered, there's a big difference between "doing" and managing the "doing" of others. And, making the leap to leading others is especially hard for those who were talented specialists and subject matter experts. The Summit Excellence Program from Performex was designed especially for you. That's why you should ask to participate in the next available Summit Excellence Program.



## Individualized for Impact

One-size fits none. Ever wondered why some people in your company seem to be promoted like clockwork and others get stifled early in their careers? The fastest-rising executives deeply understand their unique strengths and how to best use them. The Summit Excellence Program begins with a powerful 360-degree assessment that gives you the data and insight to augment your strengths and weaknesses in a confidential, supportive environment. Our state-of-the-art instruction and certified facilitators and coaches provide you with an unvarnished view of how you stack up against today's top leaders. We then tailor the 12-month Summit Excellence Program to your unique skills, abilities and needs, so the program fits you.



## The Latest Tools and Tactics That Stick

If you really want to change your career results, change your career inputs. We've designed the Summit Excellence Program with the most advanced approaches—we call it Learning 3.0 – to ensure your deep engagement in the executive learning process. Summit content is iPad-enabled, social-media enhanced and filled



with in-the-moment videos to reinforce key concepts and bring our curriculum to life, so that it makes a lasting impression.

### Doing, Not Just Thinking

The Summit Excellence Program definitely challenges your thinking. More important, Summit challenges you to apply your enhanced thinking and skills to real-life situations in the workplace. Our initial and follow-up workshops delve into your current key management challenges and provide you with consulting and action steps recommended not just by our facilitators, but also your peer participants. Together with your participant team, you will also tackle a detailed case study grounded in a true business turnaround situation during the initial three-day workshop. In Summit, you learn by doing.

### Expert Guidance to Master Your Destiny

Today's top sport stars have to continually raise their performance, skills and execution. The difference between success and failure often comes down to a fraction of an inch or second. The greatest athletes employ the best professional coaches who give them that something extra they need to excel. Beyond the initial three-day workshop, the Summit Excellence Program provides 14 touch points, so that you have continuous learning and development interaction with experienced, professional executive coaches during the twelve-month program.





## Accelerating the Expert-to-Leader Transition

You may have learned the hard way that managing specialists and other technical professionals poses a significant leadership challenge. More difficult yet is helping those executives transition from subject matter experts into management and leadership roles. Technical executives across a range of disciplines – from engineering to HR, from operations to sales – struggle with the move from specialist to manager, in part, because their skills, abilities, training and career experience naturally incline them to fact-based analysis, intellect, logic and structured process, often at the expense of workplace relationships. They're strong on IQ, but not so much on EQ (emotional intelligence). The Summit Excellence Program is built to lighten the burden and reduce the risk of transforming technical executives into successful corporate managers. That's why you should sponsor your direct reports for participation in the next available Summit Excellence Program.



## Results-Oriented Program

Summit participants learn by doing – which also serves the purpose of ensuring that their current work initiatives are accomplished with increasing excellence. We get the ball rolling by having you and your sponsored participant choose two important challenge areas to address during the 12-month program. In the first workshop in the Summit Excellence Program, our facilitators work with each participant to create clear and measurable action steps to obtain new skills and accomplish significant and specific business goals. Together, facilitators and the participant weave newly acquired leadership skills into the participant's job assignments, a highly effective approach that assures the new skill is permanently acquired.



## An Approach That Syncs, Sticks and Succeeds

Performex™ has been in the business of turning technical professionals into executive leaders for more than 30 years. Our proprietary process is joined with state-of-the-art content and is designed to augment and sync with your existing in-house development programs, not replace or supersede them. The Summit Excellence Program gets results because it blends today's best instruction on leadership and managerial skills with the latest executive learning technology as well as battle-tested coaching and reinforcement techniques. Designed with the latest Learning 3.0 approaches, Summit provides a powerful boost to your leadership transition efforts and ensures your sponsored participant's deep engagement in the executive learning process. Summit content is iPad-enabled, social-media enhanced and filled with in-the-moment videos to reinforce key concepts and bring our curriculum to life, so that it makes a lasting impression.

## Year-long Program Provides Reinforcement

Beyond the initial three-day workshop, the Summit Excellence Program provides 14 touch points, so that your sponsored participant benefits from continuous learning and development interaction with experienced, professional executive coaches during the 12-month program. Performex™ offers optional additional coaching from Certified Performex Coaches to individuals and companies wanting to enhance their development plan and set new goals for ongoing career development. Using Performex Certified Coaches to assist your employee takes the guesswork out of choosing a leadership coach. Our certification process ensures that your coach is fluent in the same programs and content that your participant has learned. Furthermore, our coaches all have excellent interpersonal skills: They provide feedback with constructive candor that is critical in giving your team member the insight and motivation to get the most out of the expert-to-leader development process.

## Designed for Frugal Companies

Summit is a full-year program with a proven curriculum (35 years worth of proof!) that is updated with the most current insights and technology, providing no less than 14 coaching touch points throughout the year. Even better, the participant fee for Summit is on par with programs provided by our industry peers who charge for only a one- to three-day, old-school workshop. For the results delivered, Summit is the most affordable program available, so that you can continue leadership development activities even when budgets for such initiatives are scarce.





## Accelerate the Middle

Because it is especially difficult for specialists and technical professionals to make the leap into management and leadership roles, companies rich in technical or subject matter experts – that is, they are specialist-intensive – often face a “crisis of the middle.” Too few of the specialists in these



companies – whether they are engineers, HR executives or sales professionals – successfully make the transition from individual contributor to manager and leader. Those companies suffer a management capabilities gap between their senior executives and the rest of their workforce; they also expose themselves and their investors to extreme succession risk. Summit is built especially for midsize to large companies with a high percentage of technical experts and specialists who need to be groomed for collaborative, strategic management roles. Summit helps these

specialist-intensive companies build a more robust “middle-tier” of management competence, faster and more cost-effectively than other programs. Summit delivers so successfully because it has been intentionally constructed with a technical specialist expert-to-leader transformation in mind.

## Tailored to Transform

For HR professionals, technical experts are among the hardest group of employees to serve, because, for them, one size fits none. Specialists look at the world in a unique way, so they will always see things somewhat differently from everyone else. The Summit Excellence Program is successful with technical experts and specialists where others fail, because we adapt our approach to the nuanced needs of each participant. Summit begins with a powerful 360-degree assessment that gives participants the data and insight to augment their individual strengths and weaknesses in a confidential, supportive environment. We then tailor our 12-month program to each participant’s unique skills, abilities and needs, so they experience and embrace a program that fits them.



## Boost Your Existing Programs

Performex™ “in-house” programs offer the ability to customize content to match your current talent management programs. We offer an individualized program that ensures your existing programs are leveraged to provide the maximum impact. While other learning providers try to replace existing programs and introduce new concepts inconsistent with their culture and/or talent management strategies, our objective is to reinforce and boost the effectiveness of your current training and development – especially for your “expert in the middle” employee population.

## Engineered for Extreme Impact

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## Line and Staff Manager Acceptance

The Summit Excellence Program's rapid acceptance by your company's line and staff managers ensures program success. Our client companies consistently rate our Summit program as the best liked and best accepted program they offer. They consider the growth of good will, talent retention and loyalty among Summit participants to be among the most significant benefits of the Summit program.

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# 12 Month Schedule



## Month 1

360/FIRO-B Data Gathering  
Pre-workshop coaching contact  
3 Day Workshop - iPad enabled  
"Self Management" Reading

## Month 2

Summary Report  
Consultation  
Prepare for  
1st Coaching session



## Month 3

1st Coaching session  
Continue to implement learning  
Access to online portal  
materials

## Month 4

"Management Skills"  
Reading  
Preparation for  
2nd Workshop

## Month 5

2nd Workshop focused  
on leadership influence  
iPad enabled reading



## Month 6

Management Job Aid"  
Reading  
Continue to implement  
learning  
Access to online portal  
materials

## Month 7

Prep for 2nd Coaching session  
Continue to implement learning  
Access to online portal  
materials

## Month 8

Webinar-Advance  
Influencing Skills  
2nd Coaching session  
4-Step Problem Solving  
Management Aid

## Month 9

Prep for 3rd Coaching session  
Continue to implement learning  
Access to online portal  
materials

## Month 10

3rd Coaching session  
Continue to  
implement learning  
Access to online portal  
materials



## Month 11

360-Degree RESURVEY  
Analysis Report  
Prep for 4th coaching  
session

## Month 12

4th Coaching session  
New Goals and Development  
Plan for future growth

Summit™ 12 Month Program Process

Summit™ Course & Module Description

Summit™ vs. Pinnacle™

Clients Include

Summit™ Overview



**Regina Constine-Berdiel,  
Southern California Edison**

“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!”

**Quincy Weatherspoon,  
Kimberly-Clark**

“Overall workshop was outstanding use of peers as ‘consultants’ was innovative approach. Use of case studies, etc. to emphasize ‘real-life’ benefit of tools and techniques was very good.”



**Summit™ 12 Month Program Process**

**Summit™ Course & Module Description**

**Summit™ vs. Pinnacle™**

**Clients Include**

**Summit™ Overview**



## Performex Excellence Program

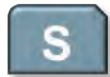


### 360-Degree Feedback

- Participant (self)
- Participant's Supervising Manager
- Peers, Direct Reports & Others
- FIRO-B

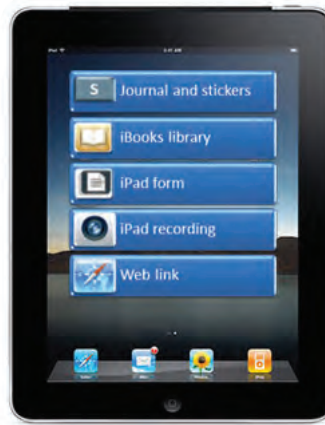
### Data Analysis

- Determine Strengths
- Identify Challenges



### 1st Workshop

- 360-Degree Feedback Report
- Management / Leadership
  - Communication
  - Planning
  - Coaching & Delegation
  - Leadership
  - Reviewing
- Team Consulting
- iPad Enabled Review & Readings
- In-session Online Polling
- Personalized Learning Journal
  - Case Study
- Video Feedback
- Goal Setting / Action Plans
  - Personal Performance Goals
  - Business Goals or Project Objective
  - Action Plans for Implementation



Summit™ Course & Module Description

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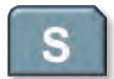


#### Implementation & Follow-Up

- Summary Report with Supervising Manager
- Online Readings & Review

#### Executive Coaching Sessions

- Certified Performex Coach



#### 2nd Follow-Up Workshop

- Advanced Influencing Skills
  - Style Flexing
  - Messaging
  - Listening

#### Executive Coaching Sessions

- Certified Performex Coach

#### Webinar – Transformational Leadership Communications



#### Resurvey 360 Multi-Rater (12 months later)

#### Resurvey Meeting with:

- Certified Performex Coach
- Participant
- Supervising Manager





## 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 for which they select more than 6 answers.

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

Item	Background Information	Summit™	Pinnacle™
1	Project manager?	Yes	No
2	Managerial experience?	First – Second	Third or more
3	Position title?	Manager/Director	Sr. Director or above
4	Total headcount in organization that reports to participant?	20 or less	21 or more
5	Current assignment “transformational”?	No	Yes
6	MBA?	No	Yes
7	In current assignment less than 6 months?	Yes	No
8	Transitioning from individual contributor role to manager?	Yes	No
9	Current job responsibility includes strategy development?	No	Yes
10	Manage professionals?	No	Yes
11	Years of experience as a manager/supervisor?	7 or less	More than 7

Summit™ vs. Pinnacle™

Clients Include

Summit™ Overview



Summit™ vs. Pinnacle™

Clients Include

Summit™ Overview

### Robert Herman, Kimberly-Clark

“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.”

### Jesse Bryson, Southern California Edison

“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.”





Clients Include

Summit™ Overview



Anacomp, Inc.	Mizuho Corporate Bank, Ltd.
Applied Biosystems	National Pen Corporation
Art Center	Newark Pacific
Bergen Brunswig Corp.	Nihon Kohden America, Inc.
California Commerce Bank	OneSource Distributors
California Institute of Technology/ Pasadena	Orange County Transit Authority
Canfield & Associates, Inc.	Overture/Yahoo
CBS Television	Pacificare Health Systems
Citizen America Corp.	Parsons Process Group
Community Bank	Presto Foods
Compass Aerospace Corporation	Road Runner Sports, Inc.
Countrywide Funding	Southern California Edison
Cutera, Inc.	TDK Electronic Corporation
FFF Enterprises/Nufactor	Tembec, Inc./Pine Falls/Spruce Falls
Fleetwood Enterprises	Tri City Medical Center
Harvey Titanium/Division of Rolled Alloys	TRW Technar, Inc.
Karl Storz Endoscopy	Unitek Corporation/ <sup>3</sup> M
Learning Tree International	UNOCAL Corporation
Litigation Sciences	Varco Drilling
Marcus & Millichap	Vistana Development
	Walters Wholesale Electric
	Xerox – Tektronix/Office Printing

Clients Include

Summit™ Overview







## Our Vision of Your Business

Summit Excellence™ will enhance your bottom-line by strengthening your leaders' ability to achieve exceptional results. Your leaders will:



### Drive Business Results

- Get maximum effort from all members of your team
- Develop reviewing skills to ensure accountability for superior results
- Learn nuanced planning skills to maximize the output of your team

### Work Collaboratively to Maximize Outcomes

- Employ empathy to create a positive emotional connection
- Get ideas across in a way that fosters team work
- Gain a reputation as a great team member



### Emerge as an Essential Leader

- Utilize processes to develop indispensable leadership skills
- Develop and deliver a compelling and forceful vision for the future
- Take on the toughest assignments and deliver great results

### Create a Culture of Accountability

- Connect with your people to build complete ownership for results
- Be a visible model for accountability
- Empower people to achieve greatness



### Develop Bench Strength for Succession

- Build outstanding teams
- Make coaching a core strength
- Gain a reputation for mentoring the best managers



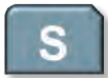


## Performex™ Development Approach



### Senior Executives as Facilitators and Coaches

- Real-World Business Expertise
- Dedicated Coach
- Group Support with Constant Contact



### Personalized Development and Business Plan

- Based on 360 Feedback
- Role Clarification
- Future goals
- Aspirational & measures of success



### Engagement for 12 Months

- 2 Immersion Workshops
- 4 Coaching Sessions
- Initial and Follow-Up Assessments
- Summary Report Consultation
- 12 Month Resurvey
- Webinars you'll want to attend
- End of program meeting



### Highly Interactive Learning

- Team Case Study
- Video Exercises
- Group presentations
- Team Consulting
- Real-life Applications
- Practical instruction

