

PORTFOLIO

JUSTIN O'BRIEN - EXECUTIVE COACH



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JUSTIN O'BREIN - EXECUTIVE COACH

Biography – Summary

BACKGROUND

I am an executive coach and facilitator at the High Performance People Group, a company I started six years ago.

My work as a coach began after a 13 year career in senior executive sales and marketing roles with companies such as Cadbury Schweppes, QBE insurance, Mattel Toys and Farm Pride Foods. I spent 3 years with Rogen International as a facilitator and have been a practicing executive coach for the last six years.

I have an Advanced Diploma in Solutions Oriented Coaching and a degree in Accounting and Finance. In addition, I have certifications in emotional intelligence testing and relationship awareness theory.

I have coached individuals from the government sector, construction, sports administration, sales and marketing and utilities. I have also coached several entrepreneurs. I am an Accredited Professional Coach with the Australian and New Zealand Coaching Institute.

OUR PHILOSOPHY

The approach I use is goal-focused and solutions-orientated.

We believe every individual has the resources within to reach their full potential. By helping people access these resources, we find remarkable people with the ability to achieve remarkable results.

When we conduct Executive Coaching we focus on :

- Satisfying the business need,
- Setting robust goals,
- Using powerful tools and frameworks,
- Ensuring there is a match between executive requirements and coach,
- Having buy in by all stakeholders to the process,
- Transitioning effectively back to the organisation at the end of the engagement,
- Realising tangible benefits for the executive and the organisation.

PROGRAM OUTLINE

We move through seven stages in the coaching process:

1. Establishing coach suitability,
2. Establishing confidentiality,
3. Establishing learning, business and personal contracts,
4. Assessing the coachee via tests and interviews,
5. Establishing goals,
6. Performing the coaching assignment,
7. Transitioning back to the organisation.

Our approach reflects industry best practice and over 20 years of helping individuals becoming self-sufficient.

Testimonials

Justin O'Brien Executive Coach

I have used Justin as a coach over a number of years. Each series of engagements effectively addressed and resolved the defined issue and need for change. This was achieved through using logical processes that yielded instant results. I would look forward to these sessions as even though they were well structured, they felt more like a conversations. I would recommend Justin as an executive coach to anyone who wants to achieve their goals and achieve change in their lives.

Shane Corben
National Operations Manager
DSEG

Justin's coaching style can be described as flexible and results focused. The outcomes from each session enabled me to focus and be more productive. He knew when to instruct, when to act as a sounding board and when to just listen. My manager was supportive of the process and could see that it was benefiting the company as promised. If you are considering an executive coach, I would highly recommend Justin.

Matt Davies
Managing Director
Sport Entertainment Products

Justin's coaching sessions always lead to something productive. Even a quick "chat" tends to provoke new perspectives on current issues and at the same time refocusses thoughts on long-term priorities. His easy style, real life experience and his ability to help others develop themselves are trademarks of his successful coaching technique. Justin strives to understand the executive's role, organisational objectives and how their unique combination of personalities, talents and experience can be best utilised for the benefit of both the individual and the organisation. I recommend Justin to anyone seeking to maximise their potential and make a positive contribution as an executive.

Mick Howland
Managing Director
Hydrosphere Consulting

JUSTIN O'BREIN - EXECUTIVE COACH

Case Study for Senior Government Executive

PROFILE

This executive was like most in his position, he was intelligent and respected. Tertiary qualified, he was able to perform reporting tasks well above the level expected of him. He was a semi-professional musician in his spare time.

SITUATION

The executive had a need to overcome his anxiousness and lack of confidence. He did not doubt his ability and in reality he knew he was smarter than most of his colleagues. In meetings, he would be unable to effectively articulate his situation. Whilst he looked composed, he was actually extremely anxious. This prohibited him from effectively voicing his opinion, participating in discussion and was ultimately perceived as a non-contributor. This was preventing him from being considered for promotion.

SOLUTION

After the initial phases of contracting, assessment and goal setting were completed, we commenced the coaching sessions. Like many sessions the tone was respectful and conversational and we spoke about finding ways to perform better in meetings and presentations. We chunked the goal down into smaller components, which we worked on one at a time. Then we discarded the tactics that didn't work and kept using the ones that did. We spoke about how he carried himself, the language and self-talk he used and how to deal with unhelpful emotions.

One of the strategies that did work was the use of an acronym that he developed to remind him of the necessary behaviors and self talk that were necessary to perform in environments where he became anxious or lacked confidence. The acronym was B.A.C.K. This stood for Breathe, Achievements, Confidence and Knowledge. He would breathe to relax, remind himself of his achievements, walk and behave confidently, and assure himself that he was more knowledgeable than every other person in the room.

BENEFITS

Once the solution had been found the benefits to the executive were instant. The anxiety was converted to positive energy that resulted in a new level of confidence. Meetings and presentations were no longer the overwhelming and demoralizing events they once were.

METHODOLOGY

The coaching session involved using the following techniques:

- Goal setting,
- Solutions oriented work in relation to the body, language and emotions,
- Templates for structuring dialogue,
- Trial and review,
- Face to face meetings, phone debriefs and emails,
- Imagery.

JUSTIN O'BRIEN - EXECUTIVE COACH

Biography – Detail

Background

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I have an Advanced Diploma in Solutions Oriented Coaching and a degree in Accounting and Finance. In addition, I have certifications in emotional intelligence testing and relationship awareness theory.

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Our Philosophy of Executive Coaching

Our coaching philosophy is to have goal orientation with a solutions focused approach. The following explains what this means.

- Coaching is conducted as one of the components of an overall plan for organisational development. Both executive and coach must be aware of the larger objectives.
- Each coaching session is planned and executed with a focus on specific goals. The session is concerned with creating solutions, being outcome focused and being oriented toward the future not the past.
- Coaching is conducted with the broader business context in mind and with particular emphasis on key business needs directly relevant to the executive.
- All stakeholders must see themselves as partners in the coaching process. In addition, all stakeholders must function at the highest levels of integrity and candour when involved in coaching activities.
- The coach brings a number of competencies to the engagement. Namely, psychological knowledge, business acumen, organisational knowledge, coaching knowledge and skills, and personal traits that promote superior performance.
- In moving to the desired goal, respect is mandatory and individual differences are acknowledged and utilised. The coaching process does not require asking about the past or analysing the problem. It seeks to progress the executive as rapidly, and as effectively as possible, while still being sufficiently flexible to respect individual differences.

An outline of a typical Executive Coaching program

An Executive Coaching engagement will follow the steps outlined below. Depending on the needs of the executive, and the organisations' needs and requirements, it is possible that not all steps are completely covered.

1. All stakeholders individually meet with the coach to ensure the best possible match between the coach and executive. The coach shares all information at this stage, for example, the approach, background information, business practices and references.

2. Before the first coaching session, it is important for all partners to develop a formal, written, confidentiality agreement. This agreement specifies what information will or will not, be shared, in which circumstances, with whom and how.
3. Three contracts are drawn up:
 - i. A learning contract which includes: purpose, objectives, timelines, scope and types of assessment, milestones, measures of success etc,
 - ii. Business, legal and financial contracts,
 - iii. Personal contracts, which include guidelines on honesty, openness, session structure, scheduling, punctuality, cancellation etc.
4. Assessment is a valuable tool in the coaching process. This can include psychometric testing, observation, interviews and in some cases 360-degree assessments.
5. The setting of specific goals is next. The goals focus on achievements and changes the executive can target, both for themselves and their organisation. These are refined as the coaching progresses. Goal achievement measurement is both quantitative and qualitative.
6. The coaching sessions that now follow are designed to:
 - i. Enhance self awareness of the implications of typical behaviours
 - ii. Learn skills, build competencies, change behaviours and achieve results
 - iii. Reflect on ways to improve and refine skills and behaviours.
7. Upon completing the coaching sessions, the executive and their coach take whatever steps are necessary to ensure that the executive will be able to continue their development. In addition, the executive's manager receives a development plan.

Benefits

Depending on the needs of the organisation and the executive, the benefits that can be realised include the following:

- Improvement in teamwork and staff morale,
- Increased satisfaction of the executive's senior management,
- Improved external image of the organisation,
- Improvement in confidence and self-awareness,
- Better work/life balance, reduced stress, improved health and better inter-personal relationships,
- Greater job proficiency and personal productivity,
- Fast-tracked learning and skill development.

Summary

In summary, when we conduct Executive Coaching we focus on:

- Satisfying the business need,
- Using powerful tools and frameworks,
- Ensuring there is a match between executive requirements and coach,
- Having buy in by all stakeholders to the process,
- Transitioning effectively back to the organisation at the end of the engagement,
- Realising tangible benefits for the executive and the organisation.

It is a paradoxical but profoundly true and important principle of life that the most likely way to reach a goal is to be aiming not at that goal itself but at some more ambitious goal beyond it."

Arnold Toynbee

RESUME

JUSTIN O'BRIEN - EXECUTIVE COACH



AUSTRALIAN & NEW ZEALAND
INSTITUTE OF COACHING

GENERAL BACKGROUND SUMMARY

After initial training and experience in accounting disciplines, I moved through a variety of sales and commercial roles with Cadbury Schweppes. I then undertook significant management and marketing responsibilities with QBE/Trade Indemnity Australia, Mattel Toys and Farm Pride Foods. For three years I helped companies win and grow business as a consultant with Rogen International. The last six years have been running my own company as an Executive Coach and Facilitator.

PROFESSIONAL COACHING BACKGROUND

After 13 years in the corporate sector I changed direction to a career that aligned more closely to my values. I joined a face-to-face communications consultancy and started to train people in winning and growing business. I had another step to go in aligning to my values and started my own coaching and facilitation business in 2003.

Upon launching my new business, I already had extensive facilitation skills, learning these from some of the best in the business. Whilst having coached in the past, there was a need to credential up and formalised my coaching skills. I attended Ampersand Australia and attained an Advanced Diploma of Solutions Oriented Coaching over a two year period. I applied this learning extensively in my coaching and facilitation work with a great deal of success.

I studied further and gained certification in Relationship Awareness Theory and Emotional Intelligence testing using the MSCEIT[®]. These tools I find useful if I need to help clients quickly determine why they behave the way they do. For example what their strengths are, how they respond to conflict and how they manage emotions. From my facilitation studies I also bring knowledge, templates and processes in the areas of conflict resolution, negotiation, presentation skills, coaching and influencing.

The type of clients I have been involved with cover a wide range of executives. These range from CEO's of medium sized companies, economists, entrepreneurs, sales directors, venture capitalists, accountants, engineers, COO's and public relations executives.

The process each of these executives were taken through was different due to their differing needs. There was one constant, however. They all had a desire to change something and this need was clarified during the coaching process.

The coaching process used was either a three step process or a seven step process.

The three step process involved

1. Establishing compatibility, objectives and frequency
2. Delivering the coaching
3. Debriefing the coaching

The seven step process is based upon industry best practice and involves the following

1. Managing Confidentiality
2. Pre coaching activities
3. Contracting
4. Assessment
5. Goal setting
6. Coaching
7. Transitioning to long term development

The seven-step process is used when coaching within large organisations. Typically, there will be three or more parties involved, their buy in and support is critical to the success of the coaching assignment. The parties are the executive, the executive's manager, the coach and HR if they instigated the coaching. The reporting back and transitioning is more formal. This is done to ensure the needs of all parties are met.

In helping the executive achieve their goal(s), the coachee will experience a number approaches. There is a definite goal focus, which is coupled with a solutions orientation. Through the solutions orientation we must use every resource the executive has to help them achieve the required change.

Professional Memberships

Qualification	Institution	Completion Date
Accredited Professional Coach	Australian and New Zealand Institute of Coaches	Nov 2009

COACHING QUALIFICATIONS

Qualification	Institution	Completion Date
Adv Dip Solutions Orientated Coaching	Ampersand Australia	2004

ADDITIONAL ACADEMIC QUALIFICATIONS

Qualification	Institution	Completion Date
Bachelor of Commerce	University of Tasmania	1987
Certified to facilitate the "Strength Deployment Inventory" and associated tools of Relationship Awareness Theory	Personal Strengths Australia	2003
Certified to facilitate the MSCEIT®, The Mayer, Salovey, Caruso Emotional Intelligence Test.	Evidence Based Psychology, Melbourne University	2006

COACHING EXPERIENCE

No.	Date From - To	Position of Coachee	Industry	No. of sessions	Key Topics / Areas covered in sessions and / or Outcomes
1	Oct 07 – March 08	Snr Economist	Govt	6	Topics: confidence & communication. Outcome: confidence lifted from low to above average
2	May 07 – May 09	CEO	Consultancy	10	Topics: varied -ongoing sessions Act as a sounding board. Outcomes: Thought provoked and ideas stimulated
3	April 08 – Sept 08	Sales Director	Sport & Ent	8	Topics: dealing with and motivating staff Outcomes: self awareness generated, staff issues improved
4	March – April 09	Venture Capitalist	Finance	4	Topics: Pitching Outcomes: Core skills developed. Self awareness generated via video
5	July 07 – Dec 07	CEO	Marketing	6	Topics: Staff issues, transitioning to new role Outcomes: Techniques provided to deal with staff, solutions derived for transition issues
6	May 07 – Jan 08	Consulting Engineer	Environment	6	Topics: Establishing career / life purpose Outcomes: resulted in their eventual acquisition of business
7	May 07 – May 09	Project Manager	Energy	8	Topics: dealing with bosses, managing work load, finding place within team Outcomes: personal growth achieved, new opportunities pursued and achieved in another department
8	April 08 – Sept 08	MD	Sport	6	Topics: alleviate divisive team culture Outcome: new structure and culture change program instigated.
9	Jan – Feb 09	Sales Director	FMCG	4	Topics: Being entrepreneurial in a conservative environment.: Outcomes: Finding middle ground and pursuing the ideas that will make a difference – letting others go
10	May 07 – Sept 07	Assistant Regional Chief	Essential Services	5	Topics: communication, pitching ideas Outcome: strategies implemented successfully Career advancement

ADDITIONAL PROFESSIONAL / COMMERCIAL EXPERIENCE

Position Held	Industry	Company	Dates
General Manager Sales Operations	FMCG	Schweppes Cottee's Div., Cadbury Schweppes Melbourne	1995 – 1996
Responsibilities & Achievements			
<p>Major areas of responsibility:</p> <ul style="list-style-type: none"> • Report and design profitability measures. • Manage trade fund system (\$100 m). • Manage GHPL account. • Report to Sales Director – one of only three General Managers in Schweppes Cottee's. <p>Achievements:</p> <p>Strategic Direction My appointment as GM Sales Operations was to instigate a change from the Schweppes management style to the Cottee's management style. In order to assist in the required change the first strategic meeting for State Sales Manager was held under my direction. A mission, objectives and general strategies were developed and the motto in relation to sales and profit of "achieving the right balance" was struck and is still in use today.</p> <p>Profit Focus The Schweppes and Cottee's businesses were traditionally managed for volume and profit respectively. By applying some basic Profit and Loss principles to the Schweppes business unprofitable trading ceased. This was a paradigm shift and did result in a drop in volume of some two market share points, however realised an increase in operating profit of \$2million.</p> <p>Trade Funds With the responsibility for managing up to \$100m in trade funds it was necessary that we maximised the return on amounts spent with the trade. To capture this the development of software was commissioned which would integrate spend, and promotional off take. State Managers were equipped with appropriate hardware and software to effect this strategy at retail level.</p>			

Position Held	Industry	Company	Dates
Assistant General Manager Australia And New Zealand	Insurance	Trade Indemnity Australia Limited (a member of the QBE Insurance Group)	1996 – 1997
Responsibilities & Achievements			
<p>Major areas of responsibility:</p> <ul style="list-style-type: none"> • Lead, manage and motivate a team of 30 sales and service people. • Develop and implement sales and marketing strategies. • Act as a member of Senior Executive (5 members) answering to the Managing Director. • Attain or exceed sales budgets (\$40 m). • Be involved in the sale of company to QBE. <p>Achievements:</p> <p>Restructure It was readily identifiable upon my commencement that the structure of TI was not customer focused</p>			

or profit focused. A restructure was necessary that would realise an amalgamation of the underwriting, sales and service functions. The first step was to increase customer focus and quality of business introduced by merging the sales and service departments. A broker relationship manager was appointed whose job was to ensure that our two sources of business, the direct sales force and the specialist brokers, did not come into conflict. By doing this additional business was introduced. To ensure objectivity, commissions were removed and fixed salaries were introduced. This also increased the quality of the business introduced and resulted in greater profitability. The second step was the amalgamation of sales/service with the underwriting department. This was realised some twelve months later and enhanced the benefits outlined above and entrenched greater professionalism and expertise.

Communications Strategy

A major study was initiated into the Trade Credit Insurance market. As a result the target audience was identified, market size established and the opportunity calculated. From this three campaigns were identified: "corporate", "prospect", and "new product". The communications strategy was implemented and underpinned the successful company restructure outlined above.

Sale of TI

After twelve months at TI, our London office advised that the Australian operation was to be sold. As a member of the executive I was charged with assisting in the sale of the business. This was necessary as the type of insurance we sold was uncommon and perceived as complex and needed to be explained. After several months of presentations the operation was sold to QBE. My role was to explain the domestic operation and detail how the business was structured and marketed.

Position Held	Industry	Company	Dates
Trade Marketing Manager	FMCG	Mattel Toys	1998 – 1999

Responsibilities & Achievements

Major areas of responsibility:

- Develop consumer promotion implementation strategies.
- Implement Visual Merchandising Strategies with a \$2 million budget.
- Assume responsibility for trade relationships.
- Manage a team of 4 people.
- Act as a member of senior executive reporting to the Australian Managing Director.

Achievements:

Trading Terms

An analysis of the company's account profitability revealed that many of the trading relationships were unprofitable. This was mainly due to loosely structured trading agreements. After establishing the true cost of doing business a trading terms document was structured that was consistent across all retailers. The expectations of each term was defined, some elements were combined, tax was either included or excluded from calculations, and growth incentives made realistic. A tax benefit was also realised by this restructuring.

Multi Media

The agency edit suite was always a mystical area that incurred significant fees. Some investigation into video editing and desktop publishing revealed that for very low lease payments an in-house production facility could be established. Without compromising creativity, project savings were identified in the first year of in excess of \$300k.

Trade Fair

Mattel conducts two trade fairs each year in the USA and one in Australia. I proposed that one of the USA fairs should be held in Australia. This was going to be difficult, as we would not have had product samples. However, by clearly defining our objective we were able to structure a multi media presentation of product demonstrations filmed at the USA toy fair which detailed retailer and brand specific strategies. A great deal of time was spent analysing each of the buyers and structuring the presentation to meet a specific objective. This was an unprecedented success and this format has been adopted for two of the three fairs held each year. An award was given in recognition of this success. Retailers regarded this as the most professional presentation they had seen.

Visual Merchandising

In the past Mattel would continue to build bigger and better visual merchandise. In recent times the cost incurred by Mattel of fitting out one retail outlet exceeded \$20,000. Attempts to curtail this expense were unsuccessful, hence a new concept was developed. This concept was modular and consistent across all retailers. By achieving economies of scale cost savings of up to 50% were realised.

Position Held	Industry	Company	Dates
Marketing And Business Development Manager	FMCG	Farm Pride Foods	1999 – 2000

Responsibilities & Achievements

Major Areas of Responsibility

- Develop and implement marketing and business strategies for retail, food service and export strategy – \$70 million turnover (New Product Development and Quality Assurance were recent additions to the portfolio).
- Manage a team of 14 sales and marketing people.
- Act as a member of senior executive reporting to the Managing Director.
- Take responsibility for supplier communications.

Achievements:

Retail sales

The building of a retail sales team was a major focus. The appointment of a National Account Manager, field representatives and merchandising force were a key part of the retail strategy. Interstate distribution was achieved along with new product launches.

Pack Relaunch

Sourcing material out of New Zealand broke the Australian monopoly for packaging material. This utilised new technology for both packaging and printing and yielded a significant competitive advantage.

Food Service/Industrial Strategy

This segment of Farm Prides business was driven by a low margin commodity focused product range. This focus was changed with a concerted drive to creating value-added products. A national selling infrastructure was also implemented.

Position Held	Industry	Company	Dates
Consultant	Training	Rogen International	2000 - 2003

Responsibilities & Achievements

Responsibilities

- Initiate, develop and maintain relationships with existing clients and prospective clients.
- Learn to deliver Rogen's core services either coaching consulting or skill development.
- Diagnose client's communication and change management issues and develop solutions.
- Work as part of team of 16 consultants.

Achievements

Targeted, sold in and negotiated consulting assignments to major sporting, utility, consumer goods, government and automotive companies. Exceeded budget requirements in first twelve months and "time in front of client" budget ratio. Delivered all Rogen service offerings i.e. winning and growing business, leadership and key stakeholder communication. Coached groups of 1 to 400 people.

TOOLS & INSTRUMENTS

SDI

The SDI is the flagship inventory of a suite of tools based on Relationship Awareness — a flexible and reliable learning model for accurately understanding the motivation behind behaviour. Unlike other "personality tests" and "type" models, Relationship Awareness Theory reveals why individuals act the way they do.

The SDI is a common sense, non-judgmental way to:

- Reduce the costs of workplace conflict and turn it into a positive force for change.
- Make business & personal relationships more productive and rewarding.
- Discover your own relating style and potential sources of conflict for yourself and others.
- Look beyond other people's "behaviour" to recognize and understand the motivation behind it.
- Encourage non-confrontational conflict management and conflict resolution in the workplace.

MSCEIT

The Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT) is designed to measure emotional intelligence by directly assessing a person's capacity to identify emotions in others, to use emotions to facilitate thought, to understand emotional meanings, and to know how to manage emotions.

The MSCEIT test is an ability test: That is, it evaluates participants' responses according to a criterion of correctness rather than relying on a self judgement such as "I am emotionally intelligent (True-False)." This is important because actual skill is very different to self-judged skills in this area.

CONTINUING EDUCATION

In collaboration with appropriately qualified fitness professionals and psychologists we will be launching a new program. It will address the physical, emotional, mental and spiritual aspects of personal development and growth