



INSTITUTE OF COACHING

McLEAN HOSPITAL, HARVARD MEDICAL SCHOOL AFFILIATE

INSTITUTE OF COACHING LEADERSHIP FORUM



BOSTON, MASSACHUSETTS

HELD AT HARVARD FACULTY CLUB

SEPTEMBER 14 – 15, 2016

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McLEAN HOSPITAL, HARVARD MEDICAL SCHOOL AFFILIATE

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C-Suite Perspectives on The Future of Business: Geopolitics, Opportunity, Risk and Leadership Success

Dear Friends,

Welcome to the 5th Institute of Coaching Leadership Forum (ICLF) and the 4th here in Boston, which is a prelude to our annual Coaching in Leadership and Healthcare Conference! We hope you will enjoy our setting in the Harvard Faculty Club and the vibrant city of Cambridge and Harvard Square.

Our group represents leading executive coaches from around the country who have deep experience in coaching c-suite executives from a broad array of industries. The ICLF is a unique opportunity to bring coaches and executives together to better understand the demands of executive leadership and how coaches can best support and develop leaders in our rapidly changing business climate. We would also like to extend a warm welcome to our 13 guests from the Queensland University of Technology in Brisbane, Australia.

This year we are taking a journey into the future and asking our leaders to paint a picture of their industries ten to twenty years from now. What will their business, customers, and organization look like in the future and what kind of leadership will take their company to this new frontier?

We are excited to have you engage in wide-ranging and deep conversations and partake in dialogue, and even debate, that will energize and push all of us to the front edge of the coaching field. Please don't hesitate to give feedback and suggestions so that the ICLF continues to grow and develop.

We look forward to participating along with you over these next two days.

Event Co-Chairs

David Noble

Senior Advisor Egon Zehnder
Advisor to Senior Executives on Leadership,
Strategy and Risk

Sally Ourieff

CEO of Translational Consulting
Lecturer and Visiting Scholar, Brandeis
University

Carol Kauffman PhD ABPP

IOC Founder / Executive Director
Assistant Professor, Harvard Medical School

AGENDA

Institute of Coaching Leadership Forum, Boston, 2016

ICLF – Day One

Wednesday, September 14th

7:30 am – 5:00 pm

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|-----------------|--|
| 7:30 – 8:00 am | Breakfast: Harvard Faculty Club, 20 Quincy Street, Cambridge, MA |
| 8:00 – 8:30 am | Opening Remarks and Day One Introduction by Co-Chairs |
| 8:30 – 11:30 am | The Future of the World: Geopolitics, Risk, and the Agile Leader
Moderator: David Noble
Speaker and Conversation - General Charles Jacoby, Retired 5th Commander United States Northern Command and 22nd Commander, North American Aerospace Defense Command |
| 11:30 – 1:15 pm | Lunch Break |
| 1:15 – 4:00 pm | The CEO's Taking Us to the Frontier
Moderator: Sally Ourieff
Roger Brown - President, Berklee College of Music
Bridget Van Kralingen - Senior Vice President, IBM Global
General Charles Jacoby – see above |
| 4:00 - 5:00 pm | Wrap up and review of learnings |
| 5:00 - 6:00 pm | Champagne Reception
North Dining Room, Harvard Faculty Club |

ICLF – Day Two

Thursday, September 15th

7:30 am – 4:00 pm

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|------------------|---|
| 7:30 – 8:00 am | Breakfast: Harvard Faculty Club, 20 Quincy Street, Cambridge, MA |
| 8:00 – 8:30 am | Opening Remarks and Day Two Introduction by Co-Chairs |
| 8:30– 11:30 am | A CMO Conversation on the Sharing Economy and Marketing to Networked Consumers
Moderator: Chip Carter
Frank Bifulco – CMO, Staples Corporation
Margaret Coughlin – SVP & Chief Marketing Officer, Children’s Hospital
Joy Howard – CMO, Sonos |
| 11:30 – 12:15 pm | Luncheon at Harvard Faculty Club |
| 12:15 – 12:45 pm | Transportation to the Boston Ballet |
| 1:00 – 2:30 pm | The Business of Ballet: Leading the Transformation of an Arts Organization
Moderator: Sally Ourieff
Presenter: Mikko Nissinen – Artistic Director, Boston Ballet |
| 2:30 – 4:00 pm | Lessons Learned from Imagining the Future
Moderators: Carol Kauffman, Sally Ourieff and David Noble |
| 4:00 pm | Transportation to the Renaissance Hotel
Check in for the IOC’s Annual Conference |



McLEAN HOSPITAL, HARVARD MEDICAL SCHOOL AFFILIATE

ICLF LEADERSHIP TEAM

David Noble

Sally Ourieff, MD

Carol Kauffman, PhD

KEYNOTE

General (Ret.) Charles H. Jacoby, Jr.

SPEAKERS

Frank Bifulco

Roger Brown

Margaret Coughlin

Joy Howard

Bridget van Kralingen

Mikko Nissinen

IOC LEADERSHIP TEAM

Chip Carter

Kelly Standel

General (Ret.) Charles H. Jacoby, Jr.



General Charles “Chuck” H. Jacoby, Jr. serves as Senior Vice Chairman with Capitol Peak Asset Management. General Jacoby brings over 36 years of experience leading military, government and international organizations. Prior to retiring from the United States Army, he was the first Army officer to command North American Aerospace Defense Command (NORAD) and the United States Northern Command, where he reorganized the 1,800-person binational and joint headquarters and integrated 35 federal, state and non-governmental organizations for the defense and security of North America.

General Jacoby has commanded at all levels in joint and Army assignments, from company to geographic combatant command, including combat operations in Grenada with the 82nd Airborne Division; Operation Enduring Freedom, Afghanistan; and Operation Iraqi Freedom, Iraq. He also served as instructor and assistant professor in the Department of History at the United States Military Academy at West Point. As the deputy commander of Combined/Joint Task Force-76 from 2004 to 2005, he was responsible for the 18,000 troops conducting combat operations in Afghanistan. As the commander of Multi-National Corps-Iraq from 2009 to 2010, he commanded the 135,000 troops conducting combat operations across Iraq. General Jacoby served as the director for Strategic Plans and Policy for the Joint Staff, where he led planning for coalition and NATO operations in Libya, assisted in the Middle East peace process and served as the U.S. military representative to

His military decorations include awards from the governments of Canada, Mexico, Honduras, Guatemala and Colombia. An avid writer and historian, he has penned scholarly monographs on the efficacy of air campaigns and the organization of modern brigade combat teams and op-eds on ballistic missile defense and strategic deterrence. General Jacoby has been involved with several organizations, including the Council on Foreign Relations, the El Pomar Foundation, the Association of the United States Army and the United States Naval Institute. He is also the distinguished chair of the Modern War Institute at the United States Military Academy.

General Jacoby holds a B.S. from the United States Military Academy, an M.A. in history from the University of Michigan, an M.S. in military arts and science from the School of Advanced Military Studies at Fort Leavenworth, Kansas and an M.A. in strategic studies from the National War College at Fort McNair, Washington, DC.

Frank Bifulco



Frank is currently Executive Vice President of Global Marketing for Staples, Inc., reporting to Ron Sargent, Chairman and CEO.

Immediately prior to joining Staples in June of 2014, he was founder and managing director of Frank Bifulco & Associates, a marketing and business consultancy serving a wide range of clients including manufacturers, retailers, private equity firms and non-profit enterprises.

Frank was previously SVP and Chief Marketing Officer at The Home Depot (2008-2011) where he re-set an iconic brand, drove traffic and transactions and increased share and preference during a challenging economic environment.

While at Hasbro (2003-2007), he was president of Hasbro North America Sales, responsible for all of Hasbro toy and game sales in the U.S., Canada and Mexico. Prior to this position, he served as president and General Manager of Hasbro Games, a distinct business entity comprised of a \$650M diverse and highly profitable portfolio of market-leading board and digital games marketed to multiple consumer and customer segments.

Frank also served as global CMO, The Timberland Company (2001-2003) and SVP Marketing, Coca-Cola North America (1994-2000). After a stint as an officer in the U.S. Army, he began his business career in brand management at Procter & Gamble.

Frank attended the United States Military Academy at West Point, earning a BS degree in Engineering and Management and graduating magna cum laude. He subsequently received two advanced degrees—MS in Engineering Science at Cornell University and MA in Business Management from Central Michigan University.

Frank is married and has two grown children, a son, Brad, and a daughter, Lisa. He and his wife, Patti, reside in Boston's Back Bay.

Roger Brown



Roger assumed the presidency of Berklee College of Music in 2004. During his tenure the college has created the world's largest online music education system and expanded its global reach to attract students from 105 countries. Under his leadership scholarship support has grown from \$9 million to \$41.5 million. In addition, he has overseen the opening of a campus in Valencia, Spain; the launch of graduate programs; the construction of a 16-story residence facility that boasts a state-of-the-art, 10-studio music production complex; and a merger with The Boston Conservatory. Brown also pioneered the creation of a suite of educational institutes and focused areas of study, including Africana Studies, the Berklee India Exchange, the Berklee Global Jazz Institute, Berklee Institute for Creative Entrepreneurship, American Roots Music, and Mediterranean Music Institute. He is a lifelong music enthusiast and a drummer by avocation. Brown is a Phi Beta Kappa graduate of Davidson College with a degree in physics, and a graduate of the Yale School of Management. Brown cofounded Bright Horizons Family Solutions in 1986 with his wife, Linda Mason, and served as chief executive officer until January 2002. Prior to 1986, he was co-director of the Save the Children relief and development effort in Sudan, and he worked on the border of Thailand with Cambodian refugees for CARE and UNICEF, both with Mason. Brown and Mason coauthored the book *Rice, Rivalry, and Politics*, which examines the management of emergency relief efforts. In addition, Brown served as a management consultant for Bain and Company, a global management-consulting firm. Brown was one of the founders of the Bright Horizons Foundation for Children, which aids nonprofit agencies that work with at-risk children in communities where Bright Horizons employees live and work. Bright Horizons has been named as one of the best companies to work for in America by *Fortune* magazine numerous times and employs 25,000 people. He also cofounded Horizons for Homeless Children, which serves the needs of homeless children throughout the Boston area. Brown is an active member of the Bright Horizons Family Solutions board of trustees and the Boston Public School Arts Advisory Board.

Margaret Coughlin



Margaret is the Chief Marketing and Communications Officer & Senior Vice President at Boston Children's Hospital. Margaret began serving in this capacity in March of 2011 and has the key responsibilities of building Children's volume, reputation and brand. She's entrepreneurial and driven by mission, and for more than 25 years has worked in branding, marketing and communications at large marketing agencies (Arnold Communications, Hill Holiday and BBDO) with brands such as Reebok, Hasbro, Fidelity and Gillette. She also worked at Procter and Gamble, Digital Globe and other public companies before coming to Boston Children's Hospital.

Joy Howard



Joy recently joined SONOS as their global Chief Marketing Officer. Prior to joining SONOS, she led global marketing for Patagonia where she reinvigorated their brand, accelerated the growth of their direct business, and pioneered new forms of consumer engagement for which she was featured in Fast Company's 100 Most Creative People in Business. She joined Patagonia from NIKE, where she was the global VP of Marketing for Converse All Star, the world's largest and most iconic footwear franchise and beloved youth culture brand. Howard developed her marketing chops at the Coca-Cola Company, where she was based in Zurich as Global Marketing Director for their joint venture with Nestlé. She began her career in marketing at Johnson & Johnson Consumer Products Company.

Prior to her career in marketing, Joy was a recording artist with Seely, the first American band signed to the 90's Britpop powerhouse label Too Pure. She has an MBA from UNC-Chapel Hill and a Bachelor's degree from Agnes Scott College in Atlanta, Georgia.

Mikko Nissinen



Mikko is recognized internationally as an accomplished dancer, teacher and artistic director. He was appointed artistic director of Boston Ballet and Boston Ballet School in 2001. Nissinen has defined Boston Ballet's image with classical, neo-classical and contemporary works from the world's finest choreographers. Born in Helsinki, Finland, Nissinen trained with The Finnish National Ballet School and The Kirov Ballet School, and danced with Dutch National Ballet, Basel Ballet and San Francisco Ballet, where he held the position of principal dancer for ten years. Nissinen is the former Artistic Director of Marin Ballet and Alberta Ballet, and he served as Executive Director of Alberta Ballet and Boston Ballet. His extensive knowledge of the business of ballet and dance history has made him a popular presenter at conferences worldwide.

Bridget van Kralingen



Bridget is Senior Vice President, IBM Global Business Services, responsible for the strategy, execution and business results of IBM's consulting, systems integration, digital agency, business process outsourcing and application management services across all industries and more than 170 countries. GBS brings clients the expertise of more than 100,000 consultants and practitioners creating value at the intersection of business insight and information technology. Effective this year, Bridget assumed co-leadership of the industry mission across IBM -- spanning industry strategy, points of view, financial performance, business development and talent, as well as IBM's operational performance with its most important clients; and integrated IBM's \$1 billion global franchise for Business Process Services into the GBS portfolio.

Over the last three years, Bridget led the build-out of three market-leading capabilities, all at leading edge of the clients' business agenda: The landmark partnership between Apple and IBM to bring business apps to the enterprise market; establishing IBM Interactive Experience as the industry's foremost digital agency, and the only hybrid capability combining world-class experience design with industry consulting, data and systems integration; and launching the world's first and largest consulting practice dedicated to cognitive business.

Previously, Bridget was General Manager, IBM North America, responsible for revenue, profit and client satisfaction for the full range of IBM's business in the United States and Canada. Before that, she led Global Business Services in Northeast Europe, Middle East and Africa.

Bridget brings more than 20 years consulting experience to her current role. She joined IBM in April 2004 as global Managing Partner of the Financial Services Sector, following her tenure at Deloitte Consulting, where she was Managing Partner of the Financial Services Sector. She is a trained psychologist and began her career as a researcher at the Council for Scientific and Industrial Research. Bridget is a member of the Board of Directors of the Royal Bank of Canada.

In addition, Bridget sponsors IBM's pro-bono initiative in microfinance, which has created a cloud-based microfinance technology platform for Latin America and an open source microfinance core banking application with the Grameen Foundation. The initiative has also designed loan products and the operating model for microfinance in South Africa.

Since 2011, Bridget has been listed as one of Fortune Magazine's "50 Most Powerful Women in Business." She was named by Euromoney magazine as one of the 100 most influential people in Finance in 2005 and one of Consulting Magazine's Top 25 Consultants for 2006.

ICLF Leadership

Carol Kauffman



Carol is a leadership coach and coach supervisor with over 30 years of experience helping leaders raise the bar on their performance and managing their success. She typically works with those who report to C-level leaders and as well as some high-potentials. She also designs and delivers coach training programs for leaders.

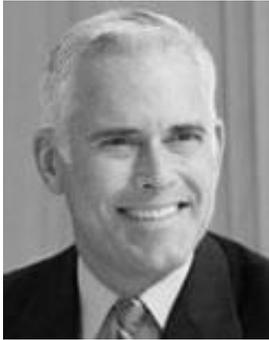
Her interest is in high-stakes coaching when the challenges are high and outcomes have a strong impact on the organization and the world. She has worked with multi-national organizations and delivered leadership development programs. Currently she is completing a 700 person, multinational three-year leadership development, coaching and leadership coach training program in FMCG and beginning a new one with the top 150 leaders in a pharma corporation.

Academic / Background

For the past 25 years Dr. Kauffman has taught at Harvard Medical School where she is an Assistant Professor and the Founder & Executive Director of the Institute of Coaching. In 2009 she received a two-million-dollar grant to create the Institute and its Centers of Excellence. She also launched, and is the Chair, of the annual Harvard Coaching Conference and the annual International Coaching Research Forum, and current Chair for the 2014 annual Consulting psychology conference and the International Positive Psychology Association conference.

Dr. Kauffman has published in many venues, and was the Founding Editor of the first academic peer-reviewed journal dedicated to coaching, *Coaching: An International Journal of Theory, Research and Practice* published by Taylor and Francis, Routledge Press. Her work has also been featured in Harvard Business Review where she directed and authored the HBR first research project on executive coaching. Carol is featured regularly in the media including New York Times, Forbes, LA Times, New York Magazine and interviewed for local and national television. She has coached live on television, radio and for a documentary film on positive psychology.

David Noble



David advises senior executives on leadership, strategy and risk issues. He is a Senior Advisor to Egon Zehnder, focused on global talent management issues. He was previously a Managing Partner at Oliver Wyman Group in New York, Shanghai and Hong Kong. Before that, David was global leader of AT Kearney's financial services group, a Managing Director/Executive Vice President at Morgan Stanley, and a Senior Vice President at RBC where he led the world's first internet bank.

David has a Master's degree in International Management from McGill University, an M.A. in Economics from Queen's University and a BA (First class honors) from University of British Columbia. David is a Board member of New York Insight Meditation Center.

Sally Ourieff



Sally Ourieff MD brings over 25 years of experience as a physician, corporate leader, and nonprofit founder to her work as an executive consultant, advisor, and coach. As founder of Translational Consulting, she works with executives, physicians and scientist leaders in healthcare, pharmaceuticals, higher education, nonprofits, and other industries. She helps executives develop effective leadership, build dynamic teams, and successfully implement their strategic goals within fast-paced, complex, rapidly changing organizations. Sally is on faculty at The Heller School of Social Policy and Management at Brandeis University where she leads the

Executive MBA Coaching Program and co-teaches the MBA capstone consulting course. She has held leadership positions in a variety of healthcare settings including Associate Medical Director of Merit Behavioral Healthcare Corporation, Medical Director of Addictions and of Child Psychiatry at Deaconess Waltham Hospital, and Medical Director of several community mental health agencies. Sally is on the Board of Directors of two nonprofits: Care 2 Communities providing primary care services in Haiti and The EDI Institute using mobile photography as a therapeutic tool in mental health. Prior to medical school, Sally worked as a journalist for the Lowell Sun newspaper. She then combined her journalism and medical background as an on-air radio host for Talk America, script advisor for Warner Brothers television (including ER and The Client), and on-air host for WFXT television's original programming. Prior to college she was dancer with the Los Angeles Ballet. Sally is a Founding Fellow of the Institute of Coaching at Harvard Medical School and leader of The Boston Executive Coaching Round Table, a group of Boston's leading executive coaches. In addition to Sally's executive consulting work, she is co-founder of Hatun Runa, a nonprofit that brings teams into the Peruvian Andes to support medical and educational development. She graduated with academic honors from Stanford University and received her medical degree from Harvard Medical School.

IOC Leadership

Chip Carter



For over two decades, Chip Carter has served as an experienced technology leader, manager, business/leadership and wellness coach/mentor, strategist, executive board member, software architect and developer. He has held senior C-level positions as a CIO/CTO and interim CMO leading impactful transitions involving technology for complex stakeholder groups in both private and nonprofit sectors. He is the founder of his own coaching company and practice, MudLotusHealth, and has coached business executives from a wide array of disciplines. As a technology and business leader, Chip has brought to bear effective, integrated approaches to innovation, change management, staff empowerment, and business process and productivity. As Director/Manager of a 90+ person engineering team at Lotus IBM, the IBM Software Group awarded him Manager of the Year in 2007. As a CIO/CTO and interim CMO working for two large global development NGOs -- Mercy Corps and Plan International USA, both global development NGOs working in over 30 countries -- Chip led sweeping, large-scale infrastructure changes, fundamental shifts in business practices and culture, the introduction of innovative marketing approaches and dramatic improvements to mission productivity and reduced total cost of ownership. Three elements characterize his professional history and operational approach: the interdependencies of clear vision and crisp execution; the development of strategic partnerships aligned on mission (as opposed to separate “businesses inside the business”); and a “whole person” approach to management and leadership, emphasizing job satisfaction, employee wellness, creativity and autonomy, and a healthy corporate culture. Chip holds a BS from Davidson College in biology and an MTS from Wesley Theological Seminary (Summa Cum Laude, comparative religion, psychology and philosophy). He has given numerous keynote talks and lectures on a variety of subjects: technology innovation, business process, leadership, corporate culture, effective management, workplace wellness, and mindfulness.

Kelly Standel



Kelly is the Project & Sponsorship Manager at the Institute of Coaching. Kelly's experience as a project administrator and coordinator span several industries.

Much of her background has centered around sales and business development where she has engaged with all levels of management and C-suite executives. She has been responsible for the production and logistics management of training programs and workshops across the country.

ATTENDEES

Geoff Abbott

Maria Eugenia Arias

Mary Atwater

Peter Carne

William Carrier

Julie Carrier

Margaret Cary

Tze Ay Chuah

Shari Cohen

Claudia Correa

Eileen Coskey Fracchia

Sharon Dauk

Matthias Erhardt

Alison (Ali) Farquhar

Fran Finn

Cassandra Frangos

Lilli Friedland

Nancy Glynn

Alan Graham

German Herrera

Aimee Horowitz

Kate Johnstone

Donna Karlin

Inger Kelly

Sebastian Lobczuk

Angela Love

Hamish Manzi

Patricia Marino

Beth Masterman

Barrett McBride

Kerrie Muir

Tricia Naddaff

Elana Robertson

Catherine Robinson-Walker

Joan Ryan

Kym Salvati

Greig Schneider

Katherine Tulpa

Janine Walker

Karen Welt Steeves

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