

CEOs
Sales
Mergers
Leadership



IDEABRIDGE



IdeaBridge is a management consulting, sales growth and executive coaching firm.

We advise CEOs and their executive teams about enhancing the impact of their leadership and improving the performance of the businesses they lead. Our work behind the scenes has quietly guided hundreds of the country's business leaders, many of which are widely recognized as the top executives in their industry.

We maintain deep, lasting and trusted relationships with clients who count on our support in these areas:

- Confidential CEO Advisory
- Executive Coaching for Senior Leaders
- Leadership Development & Manager Training
- Merger and Acquisition Facilitation
- Sales Management and Growth
- Strategic Planning and Offsite Facilitation



Trusted Advisor to CEOs

Our coaching involves a personal and confidential advisory relationship with CEOs and senior-level executives. We bring a wealth of experience and an outside perspective that is free from political distortion, something that is unobtainable when discussing options with colleagues. Our clients are free to explore various business scenarios without concern regarding motives, leaks or allegiances – valid concerns when highly-sensitive business options must be contemplated.

CEO ADVISORY

WHY CEOs HIRE A COACH

CEOs hire us as a confidential sounding board and a trusted advisor for the most sensitive of business issues; they also hire us to work with their senior teams. In addition to CEOs, we also support their direct reports and other fast-track executives as well as valuable leaders who may have recently stumbled.

We frequently assist in such areas as:

- Prepare an executive for expanded leadership responsibilities
- Improve the courage and candor of leaders
- Help increase accountability and set expectations of subordinates
- Confidential counsel on difficult issues regarding trust, teamwork and performance
- Improve time management, 80-20 focus and leadership effectiveness
- Improve the bench strength and management succession plans
- Enhance speech delivery, interpersonal skills and formal presentation style
- Resolve conflict between teams, departments or individuals
- Navigate alternatives regarding an underperforming business unit or executive



CONFIDENTIAL SOUNDING BOARD

Leaders have long understood why it's lonely at the top. Nearly everyone has a story of betrayed confidences - not always malicious in intent - but damaging nonetheless. A moment of weakness or doubt shared with the wrong colleague could have career implications.

We are independent and at the core of our coaching relationship is a level of trust and confidence where the client can safely explore concerns regarding matters such as: Board relationships, leadership impact, performance issues, lack of trust within the team, and potential business combinations.

While the client always sets the agenda based on current issues, in nearly every exchange there is a discussion about leadership impact, personal growth, and business performance.

Executive Coaching

Executive Coaching is designed for companies seeking to enhance the leadership effectiveness and improve the business results of their executives. The program equips participants with the advanced skills required for expanded leadership roles. Clients receive candid feedback from our interviews, surveys and personal observations. Objectives and timelines are then developed to remain focused on the most promising areas for development. We encourage and expect participants to modify their approach, behavior and daily activities in order to achieve results that can be easily measured and to make improvements that can be observed by others.



EXECUTIVE COACHING



COMMON PROGRAM THEMES

- Strategic thinking and business planning
- Holding subordinates accountable for results
- Working effectively across teams
- Time management and organization
- Providing clear direction and team alignment
- Creating a winning environment
- Coaching and developing subordinates
- Goal setting and delivering results
- Executive deportment and personal style
- Board and investor relations
- Communication style, presentation skills and public speaking

OUR COACHES ARE HIRED TO

- Groom executives for the top levels of corporate leadership
- Help the executive who has strong subject matter skills, but who needs to improve interpersonal and team leading skills
- Improve teamwork and cooperation across business units, locations and divisions
- Work with an executive to become a better leader and motivator
- Improve the candor and courage of leaders
- Improve the bench strength of the mid-level management team
- Help improve morale and retention of top executives
- Resolve conflict between teams or individuals (such as a manager and subordinate or peer to peer)
- Prepare an executive for future advancement opportunities and new leadership responsibilities
- Help an executive navigate alternatives regarding an underperforming business unit or a significant issue with a subordinate
- Improve time management, focus and effectiveness



Professional Management Training

Most managers lack the experience and training to guide their people and their businesses through difficult situations. We prepare your managers with the skills and tools necessary to minimize risk, calm nerves and maintain a steady focus on their business, especially in times of change and transition. While most of our participants are highly skilled in their particular area of specialty, many lack the formal training in leadership effectiveness and professional management methods. Our programs provide participants with the advanced skills and tools necessary to think more strategically about leading their people and growing their businesses.

MANAGER TRAINING

MANAGERS IN TRANSITION PROGRAM

Our Managers in Transition Program helps build team cohesion by focusing on the challenging people issues associated with mergers and other transitions. These softer issues are often what will make or break the success of a merger.

Together, we'll work to preempt the turf wars and culture clashes that predictably develop following a merger or acquisition. We work to get all of the managers talking and working together as a team, and breaking down cliques before they have time to take root. Managers will develop approaches to address the lack of trust and the silent opposition. We help them understand that change can be an opportunity for growth and that those with an open mind, who are flexible and who have a good attitude tend to do better in this environment.

During transitional periods, management must remain focused on the people issues, productivity and client retention. These are all topics of our program and at the core of a successful business combination.



MANAGER TRAINING & DEVELOPMENT

High-performing employees are often considered for promotion to a managerial role. At this stage, their technical skills will be overshadowed by the need for leadership competencies, such as: communication skills, delivering results through others, managing multiple priorities, strategic thinking and business planning.

We offer a comprehensive program to develop the skills required of leaders. This involves a formal curriculum, online and workbook-based reinforcement, confidential executive coaching and comprehensive goal setting based on the results of pre-course interviews and surveys.

Pre-Merger Coordination and Facilitation

When companies reach the decision to combine, they still face many critical obstacles that could easily derail their plans. That's why CEOs enlist a trusted Merger Facilitator, a professional who is skilled at coordinating all of the due diligence and other pre-merger activities necessary to maintain momentum and drive the transaction to a successful, on-time close.



MERGER FACILITATION



THE PEOPLE ISSUES ARE VITAL

The success of any business combination rests largely on the people issues. We can help prepare your team in these areas:

- Pre-empt the culture clashes and turf wars.
- Facilitating workshops that result in team cohesion, the creation of cultural standards and new performance expectations.
- Assisting HR and Management with the design of new reporting structures and coordinating the leadership transition process.
- Coaching for speeches and presentations to Boards, shareholders and employees.

DRIVING THE PROCESS TO CLOSE

We help drive the transaction to a successful close, assisting in such areas as:

- Orchestration of professionals. A successful outcome requires considerable input and reliance upon a myriad of outside professionals. Schedules must be choreographed to ensure proper sequential staging of professionals who have interdependencies. Bankers, accountants, attorneys, technology vendors who must evaluate product mapping on different systems platforms, facilities people must be coordinated for reviews of potentially redundant locations, etc. We facilitate this process.
- Engage in shuttle diplomacy to address tough issues. Politically touchy issues that are awkward or risky for the merging parties to publicly approach can be tactfully and artfully addressed in private.
- Keep everyone focused on the big picture. The professionals (attorneys, bankers, accountants, etc.) are so busy representing the interests of "their" party that they can lose focus on the larger picture of getting both sides to make the mid-course adjustments and compromises necessary to complete the transaction.



Sales Growth

We provide a suite of programs that progressively build the skills and reinforce the disciplines of sales professionals and their managers. What makes our programs so unique is a combination of our approach, content, reinforcement and follow-up systems. These programs have guided some of the nation's most recognized companies to generate Billions of dollars in new business.

SALES GROWTH

SALES MANAGEMENT TRAINING

Most sales managers were hired because they were sales superstars, but few were formally trained to be managers. Sales experience is not enough...leading a team of sales professionals requires a far different skill set and outlook than that of a sales producer.

This program is designed to build the skills required of sales managers, including: managing the entire sales process, pipeline management, and coaching sales people who are struggling to meet budget. Ideally, this program should be completed prior to any companywide sales training or sales culture initiative.

SALES TRAINING

The biggest challenge with sales training is getting your people to actually use the new skills, tactics and approaches in the field; we've built a program that solves this problem.

Based on feedback from over a thousand participants, we've built a program that is powerful, yet incredibly flexible. Participants select the disciplines and tools that fit most naturally with their own style, personality and comfort level. Our ongoing reinforcement, manager support and accountability tools lead to more predictable and consistent sales results.



REFERRAL BUILDING

Everyone agrees that warm referrals are the preferred source of new business. But the problem is that most people are not consistently generating enough referrals.

This program guides participants through a process that results in a consistent flow of warm, qualified referrals. New business opportunities are generated by using the program's strategic approach to referral building and referral source management. This program represents the best method known to quickly build new business without having to make cold calls. The result is more business, with less selling.

John D. Callos
President & CEO

Mr. Callos advises CEOs and their executive teams on leadership issues relating to corporate strategy, sales and improving business results. His work involves confidential CEO advisory services, keynote speaking, executive coaching, strategic planning facilitation and corporate training. Mr. Callos is internationally recognized for his expertise in the areas of leadership development, executive accountability and sales process methodology. Mr. Callos is an ultra endurance athlete who has competed in world class events around the globe, including the Sahara Desert, Canada and Hawaii.



JOHN D. CALLOS

Mr. Callos works with business executives to improve their effectiveness as leaders and the results of the companies they lead.

His methods to improve performance and generate results have been featured in American Banker, Selling Power Magazine, The Orange County Register and business publications distributed to 30 foreign countries, including India's professional business journal, *The Effective Executive*.

Mr. Callos' business methods were featured in an international competition where he was awarded the first place trophy and the title of "*Business Guru of the Year*."

Mr. Callos has decades of senior management experience in the areas of corporate strategy, executive performance and sales productivity. He has worked in NYSE banks including Bank of America, Wells Fargo and others. Prior to IdeaBridge, Mr. Callos served as Executive Vice President of the Mainland Business Operations of a NYSE Bank, managing its business units, strategic planning and sales groups.

Mr. Callos served as Vice Chair of the Economic Development Commission and led a task force on economic revitalization for one of America's largest cities, the results of which have been published internationally.

Mr. Callos has been a frequent keynote speaker, both locally and abroad, for banks, insurance companies, trade associations and business schools. His presentations typically address such topics as: leadership principles, executive accountability, personal goal achievement, and sales growth strategies.

Mr. Callos earned a Bachelor of Science degree in Business from the University of Southern California (USC) and graduated from USC's Entrepreneur Program. He completed advanced coursework with the University of Virginia, Colgate Darden Graduate School of Business through an executive development program.

Mr. Callos was raised in Southern California where he earned the rank of Eagle Scout. When he's not conducting keynote speeches or meeting with CEOs and their executive teams, he will likely be found training and competing in ultra endurance events around the world.

Mr. Callos ran in the 155-mile Marathon des Sables, "*The Toughest Footrace on the Planet*", a self-supported race through the sand dunes of Morocco's North African Sahara Desert.

Mr. Callos competed in the invitation-only Ultraman World Championships, a 318 mile triathlon held on the big Island of Hawaii that includes a 6 mile open ocean swim, 260 miles of cycling and a 52 mile double-marathon run.

CLIENTS & PAST PARTICIPANTS



“I have found John Callos and IdeaBridge to be a valuable resource in enhancing the skills of our management team. Their coaching is results oriented and delivered with a high quality of energy. John does not offer a “quick fix” to issues, but instead creates a disciplined approach that will ensure success long after the engagement has ended.

“Working with IdeaBridge has been a great experience. It has provided me with the tools to make me a better manager in running all facets of my business and my career. Their approach is individualized, customized and straightforward; my association with them has been invaluable.

“IdeaBridge has consistently delivered focused, insightful counsel that has had a direct and measurable impact on the growth of our companies.

“IdeaBridge took our executives to new heights and allowed our people to focus on highly sensitive issues, including needed behavioral adjustments and skill deficits. Had these issues been broached through the standard protocol, the working relationships would have been irreparably damaged. IdeaBridge protected vital working relationships, made our personnel more important and valuable to the organization and positioned them for additional responsibilities.

“IdeaBridge has given me keen insights that have enabled me to think more strategically, communicate more effectively, and work more efficiently. In summary, their involvement with our company has taken me to a higher level.

“If you’re looking to improve your executive ranks or need personal executive coaching, there’s none better than IdeaBridge. Not only will you see the difference, but others will point out the changes as well.

“IdeaBridge’s individually-focused one on one training and coaching has helped my managers grow their skill sets quickly and prepare them for the next level.



IDEABRIDGE
Corporate Growth Advisors

IDEABRIDGE, LLC | (800) 986-1230 | WWW.IDEABRIDGE.COM

3020 Old Ranch Parkway, Suite 300
Seal Beach, CA 90740

Phone: 800/986-1230 Fax: 562/391-1863
www.IdeaBridge.com
Growth@IdeaBridge.com