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INTERIM EXECUTIVE

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Leadership

A summary of the various types of leadership positions I have held with accomplishments. A list of leadership training and coaching I have been involved with.

Corporate Roles

SVP GLOBAL INFRASTRUCTURE, CITIBANK PRIVATE BANK 1997 - 2002

While at Citibank, there were two major programmes I led that were examples of complex, international leadership. In both cases the original idea for the programmes came from me and I was able to put together teams to realise the results. At Citibank I was also privileged to work with Warren Bennis to design a leadership academy in the bank.

The Private Bank had a very successful niche business supporting US Based law firms – in fact they had 68% of the AMLAW 100 as clients. In the late 1990's law firms were becoming more global. My proposal was to replicate the entire banking model first in London, then in Singapore. The project involved enrolling private bankers, service staff, operations staff and product specialists first. The team grew to 24 specialists worldwide. Then negotiations began with third-parties to design how the service could be delivered. Although the bank did not have all the required functions necessary to deliver the service, the team found ways to accomplish it working through other banks. After 6 months the first service was opened in London. A programme manager then took the idea to Singapore.

When customers joined the bank, there were 28 basic products they could open. Generally, they only opened one or two types of accounts. Over the lifetime of the customer, they would usually open three more for a total of five. I proposed an idea to change the onboarding process to allow them to open as many of the 28 products as they wanted in one effort and to open any more with a simple phone call. I met with tremendous resistance from bankers, service staff, product specialists, in fact just about everybody. Armed with data from the product areas, and customer comments about the current process I proposed we merge the 28 applications into a single application form. Biggest resistance then came from the lawyers. So I took all 28 forms one weekend and merged all the documents, cutting out the duplicate paragraphs – in fact almost 70% of the paragraphs were duplicated. 90% of the customer form data was duplicated, no wonder customers didn't want to open more than 2 at the beginning. I won over the lawyers. I built a consensus and then slowly a core team formed that ran with the idea (including the head lawyer). Within 3 months I only attended their weekly steering meeting and insisted on the goals being adhered to. In the end, 35 people were adamant they would make this work. We dropped from 28 application forms to 2 (due to regulatory reasons we could not do a single form) and designed a simple service form that captured all the information needed from the customer in one effort. When launched, the number of accounts opened by new customers averaged 6 and revenue from these products increased by 37% over the first 9 months.

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VP REENGINEERING, AMR - AMERICAN AIRLINES, 1981 - 1995

My leadership skills started to improve when I was mid-30s at American Airlines. I was being mentored by two senior executives (although I did not realise that at the time). I was given a number of roles where I had to generate the case for, and obtain people-commitment to lead major change. At progressively senior roles I did this in IT, process improvement, human resources, airport operations and global training. Finally I started the American Airlines leadership academy which was a fledgling idea but was disbanded when the original CEO retired.

LEADERSHIP WORK

Since becoming independent in 2002, I have been involved with leadership development. I started with the Zenger-Folkman Extraordinary Leader program based in Salt Lake City. Here I was able to understand the data and research current-at-the-time and to see how powerful leadership traits were compared to other managerial traits. I assisted ZF put together their first program, including the training course. ZF already had a remarkably good 360° review process in place. As one of the first coaches I was certified to coach others. Soon we had about 8 coaches worldwide, three of whom I had certified in the program. The certification model they used was the same as used by Steven Covey who was a neighbour and worked with ZF from the outset.

After delivering ZF leadership for a number of years I wanted to move out of corporates and into more personal leadership and coaching so formed the Authentic Peak Performer Forum (now rolled into the Achievement Academy). This allowed me to provide leadership coaching to aspiring individuals around the world who had no access to coaching, or funds to pay for it. I created my own 360° review online using a white-label service out of Denver.

LEADERSHIP ACTIVITIES

As long ago as 1989 I formed a civil rights charity in the US and chaired it for the first few years. I have also provided leadership to major change initiatives in charities such as the New York City Susan B. Komen Race for the Cure, New York Ballet and have lectured on leadership in business at the University of Victoria, PACE University and Columbia University. I continue to look for new opportunities to lead for change.

In recent years, I have been looking for ways to change the narrative of leadership development. In some places, particularly the UK, there is much confusion over management and leadership and many are missing the point. Also, the study of leadership has drifted towards the cultural 'hero' and ordinary people are feeling disenfranchised because they will 'never be another Steve Jobs'. In fact everyone has the ability to lead. We need to address the world's major issues, but global solutions take way too long to deliver. We need many, many, many local projects around the world all leading up to a better future. That's the leadership I promote.