



JEFF KAPLAN, PH.D., MBA, MCC

Dr. Jeff Kaplan has been working in the fields of education and psychology for 25 years. Jeff has spent the majority of the last 15 years coaching, training and consulting. He has developed and facilitated over 200 training programs on team development, communication/assertiveness, interpersonal dynamics, and corporate wellness; coached over 200 managers and executives on issues related to emotional intelligence, particularly self & organizational awareness, executive presence, and relationship management; and he has consulted with organizations in healthcare, manufacturing, biotech, pharmaceutical, education, law, government, and others, receiving local and national media coverage (*SmartCEO*, *Philadelphia Inquirer*, *Philadelphia Business Journal* as well as various other media). Jeff is extensively trained and highly skilled in the creative design, development, and measurement of change processes. Jeff's consulting work has been primarily focused on strategic development, organizational & cultural change, and interpersonal relationships. As an executive coach, he is known for his innovative approaches to help managers and executives break free from habitual thought and behavior patterns and think, decide, and act mindfully.

Jeff has created various train the trainer and leadership development programs, led cultural change initiatives, and he trains and supervises facilitators and coaches. He created a coaching program for Penn State's Smeal College of Business EMBA students; coaches Wharton MBA and Executive MBA students; cofounded Breakthrough Coaching, a company focused on teaching advanced coaching skills to experienced coaches; started and oversees the coaching division for Habit Change Company, which provides health coaching to hospital patients, executives, and managers; co-developed and teaches a 126-hour coach training program taught online, at Neumann University, Atlantic Health and other locations; and helped spearhead a three-year leadership development program for a billion dollar healthcare system located in Philadelphia, PA.

INDIVIDUAL BACKGROUND

EDUCATION

Ph.D., School Psychology, Temple University (1995)
M.B.A., Business Administration, Penn State University (2007)
M.Ed., Education, Temple University (1995)
M.A., Counseling Psychology, Boston College (1990)
B.S., Psychology w/minor credits in Computer Science, University of Maryland (1987)

COACHING CREDENTIALS AND CERTIFICATIONS

ICF Master Certified Coach (MCC)
Certified Habit Change Coach (CHCC)
Certified Professional Co-Active Coach (CPC)
Certified MentorCoach (CMC)
DISC
Integrated Market Communications and Brand Management Coach, Penn State
Hay Group Emotional Intelligence Inventory (EII)
Booth 360
Lominger (a division of Korn Ferry) VOICES 360
Numerous other business and psychological certifications

COACH RELATED ACTIVITIES

- President, ICF Philadelphia Area chapter (2011)
- President, COO & Cofounder, Habit Change Company (2005 - present)
- Founder & Trainer for Breakthrough Coaching, Advanced coaching skills for experienced coaches. ICF accredited for CCEUs (2009 to present)
- Co-Developer & Trainer for Habit Change Coach Training & Certification, 125-hour training program, pending ICF approval as ACTP
- Trainer for MentorCoach Training School (accredited by ICF), teaching the 31-week Foundations program for new coaches (2004 - 2007) -- taught coaching to over 100 master's and doctoral level clinicians located across the globe
- Support Group leader for new coaches, MentorCoach (2004 - 2006)
- Developed and teach coaching skills program for Chester County managers and supervisors
- Co-led and executive coach for three-year executive leadership development initiative for billion dollar health system while it was going through restructuring
- Executive MBA Coaching Program – founded and managed program for Pennsylvania State University Smeal College of Business Executive MBA program (\$250,000/yr PSU investment)
- Private business coaching executives and entrepreneurs in U.S. & Europe
- Freelance coach for: Ken Blanchard Companies, Take Charge Consulting, DLS Coaching, & Penn State University

REFERENCES

Sandy Gomberg, Former CEO, Temple University Hospital, sandra.gomberg@comcast.net, (215) 920-5976

Linda Post, Medical Director, United Healthcare Community Plan of Ohio, Linda.Post@uhc.com

Lon Justice, Vice president and General Manager, Agilent Chemical Analysis Group (CAG), lon_justice@agilent.com, (408) 553-7197

Bob Lux, CFO, Temple University Health System, robert.lux@tuhs.temple.edu, (215) 707-3802

Stan Frankel, Vice President, Clinical Development, Micromet, srf2129@columbia.edu

CLIENT INFORMATION

SKILL AND METHOD OF PROBLEM DIAGNOSIS

- As a psychologist, use scientist-practitioner approach to identify and solve problems.
- Use appreciative inquiry and other methods that recognize discovery as part of the intervention.
- Use 360 assessments and other tools to assist in diagnosis and information sharing.
- Received advanced training through academia, workshops, certification programs, and retreats.

ABILITY TO ACHIEVE RESULTS

- Coaching satisfaction & effectiveness surveys, outcome measures (using predefined objectives), and observations from others have consistently demonstrated positive results.
- Multiple promotions, salary increases, and affirmative feedback from coachee's bosses have also been consistently positive.
- Been asked to provide additional services at every organization I provided coaching, including being only one of two coaches on one particular project.

OUTCOME-BASED CLIENT INFORMATION (LAST 5 YEARS)

Note: Projects with multiple outcome objectives listed more than once

WORKFORCE CHANGE MANAGEMENT AND TRANSITION

- Designed and facilitated two-day and follow-up one-day strategy retreat for \$750 million hospital going through restructuring. Also provided coaching to the CEO.
- Provided organizational analysis, 360 assessments, and coaching for top leadership at public school system during leadership changes.
- Coached Director level manager of large biotech company during two rounds of workforce change management.
- Provided transition coaching to several executives in healthcare, law, and education.

PROCESS IMPROVEMENT

- Organized and led company-wide process improvement initiative for small healthcare company.
- Assisted healthcare boutique law firm with process and efficiency issues as well as business development.
- White belt certified in Six Sigma.

STRATEGIC AND OPERATIONAL PLANNING

- Designed and facilitated 2-day and follow-up 1-day strategy retreat for \$750 million hospital. Also provided coaching to the CEO.
- Chief Operating Officer for Habit Change Company (5 years), overseeing all operations.

CONFLICT MANAGEMENT

- Conducted conflict management programs for school districts.
- Developed and facilitated supervisor training for government agency which included conflict management skills.
- Provided board-level intervention for school district which had conflicts among Board members and between Board and Superintendent. Conducted qualitative 360 degree assessments for all Board members and superintendent, submitted and presented findings, and coached Superintendent and school board President through change initiative.

GROUP AND ORGANIZATIONAL START-UP

- Cofounded small start up with 40 employees.
- Led one-year initiative for partners in law firm to combine skills and operate strategically and together, maximizing resources and strengthening their brand.
- Facilitated over 100 groups on personal change initiatives.

LEADERSHIP COACHING

- Coached CEO of two different Philadelphia hospitals.
- Coached CEO of large construction company
- Coached CFO, Chief of Staff, and EVPs of billion dollar hospital system.
- Coached senior leader, designed and led retreats for large bio-tech firm.
- Coach other senior leaders in manufacturing, finance, pharmaceutical, and education.

CULTURAL CHANGE MANAGEMENT

- Led two-year cultural change initiative for suburban Philadelphia school district.
- Coached senior manager for large pharmaceutical company going through cultural change after an acquisition.
- Coached senior leaders on cultural issues -- between the leader and the organization or within the organization.
- Assisted with organizational diagnosis then co-designed and co-led cultural change initiative for large casino and hotel in Atlantic City.

DATA COLLECTION AND FOCUS GROUP PLANNING

- Conducted focus groups and assisted in other data collection methods, such as one-on-one interviews, surveys, and observations for organizations in education, entertainment, and healthcare.
- Part of market research analysis for health program that I designed and led for Board members, executives, managers, members, and potential members of home healthcare/insurance company.

ORGANIZATIONAL ASSESSMENT AND DIAGNOSIS

- Conducted system-wide organizational diagnosis for school district, hotel and casino, hospital, and Ivy league university. Includes one-on-one interviews, focus groups, report writing, presentation, and, in some cases, executing an intervention strategy.

LEADERSHIP TRANSITIONAL

- Provided assistance during transition of superintendent of school district and at pharmaceutical company.
- Coached Senior VP of large manufacturing company through upline leadership change.
- Coached senior executive of large biotech through leadership changes as well as coaching him through succession planning.
- Coached senior leader at hospital system through a change in title and role then led strategy retreat for his new team.

MEETING DESIGN AND FACILITATION

- As part of diagnosis and intervention in school board conflicts, provided research, feedback, and strategy for running school board meetings.
- Coached several leaders across industries to design and run effective meetings.

GROUP AND ORGANIZATIONAL EFFECTIVENESS

- Coached board members to improve effectiveness and efficiency of meetings.
- Led one-year strategy meetings, one-on-one and group coaching for partners of law firm to improve organizational effectiveness and business outcomes.
- Coached CEO and co-facilitated meeting for senior management of hospital to improve their effectiveness.

TEAMBUILDING ASSISTANCE

- Conducted assessment then designed and led one-day retreat for executive director and senior physicians at hospital-based outpatient family practice.
- Designed and facilitated annual teambuilding retreat for 1st, 2nd, and 3rd year residents of outpatient

family practice (7 consecutive years).

- Designed and led teambuilding retreat for Executive VP and new team of a billion dollar hospital system.
- Co-developed and co-led over 20 teambuilding programs for small and large organizations.

HIGHLIGHTS OF COACHING PROJECTS

- Coached over 100 senior managers, executives, and board members of medium and large organizations located across the globe, with a specialty in emotional intelligence. Typical issues include boss, peer & direct report relationship management, executive presence, influence, facilitating meetings, and managing change.
- Co-created 125-hour coach training and certification program taught at universities at the graduate level. This training focuses on increasing the coach's self-awareness while teaching them skills across 18 coaching competencies. This has since expanded as a required course for NU's Masters in Strategic Leadership.
- Co-led three-year leadership development & executive coaching initiative for billion dollar health system while it was going through restructuring.
- Created and ran an executive coaching program for Penn State's Smeal College of Business Executive MBA students – this program continues to exist, providing up to 34 coaching sessions for every executive MBA student. It has expanded to include on campus MBA students.
- Co-created Breakthrough Coaching which provides advanced coach training for senior coaches.
- Taught coaching to over 100 master's and doctoral level clinicians located across the globe.
- Taught coaching skills for supervisors at Chester County Government, now a required leadership track.