

Proposal

# CROSS RIVER BANK

## SENIOR LEADERSHIP DEVELOPMENT PROGRAM

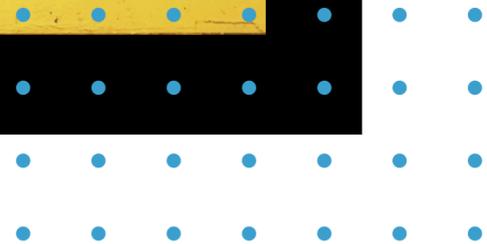
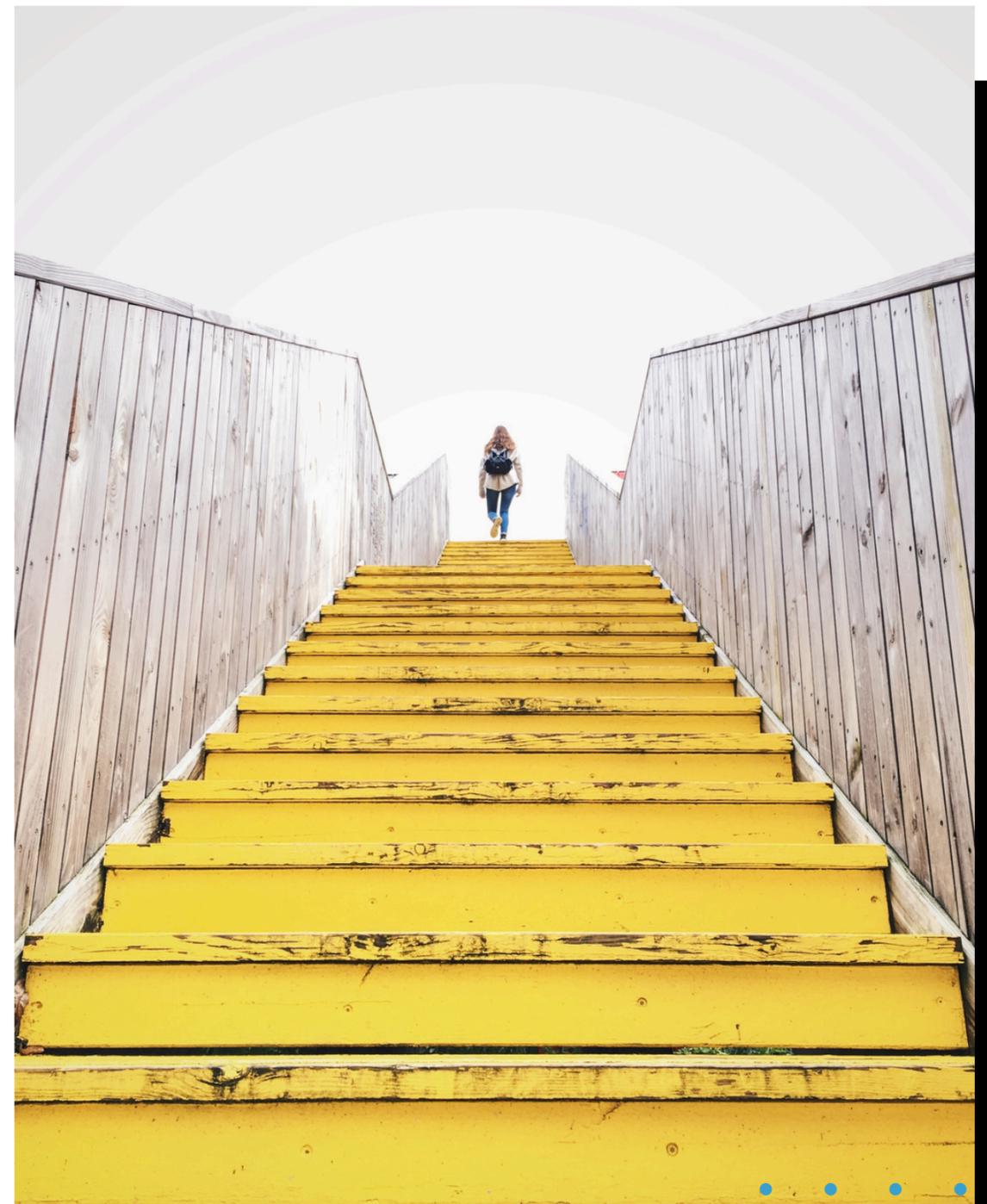


May 23, 2025

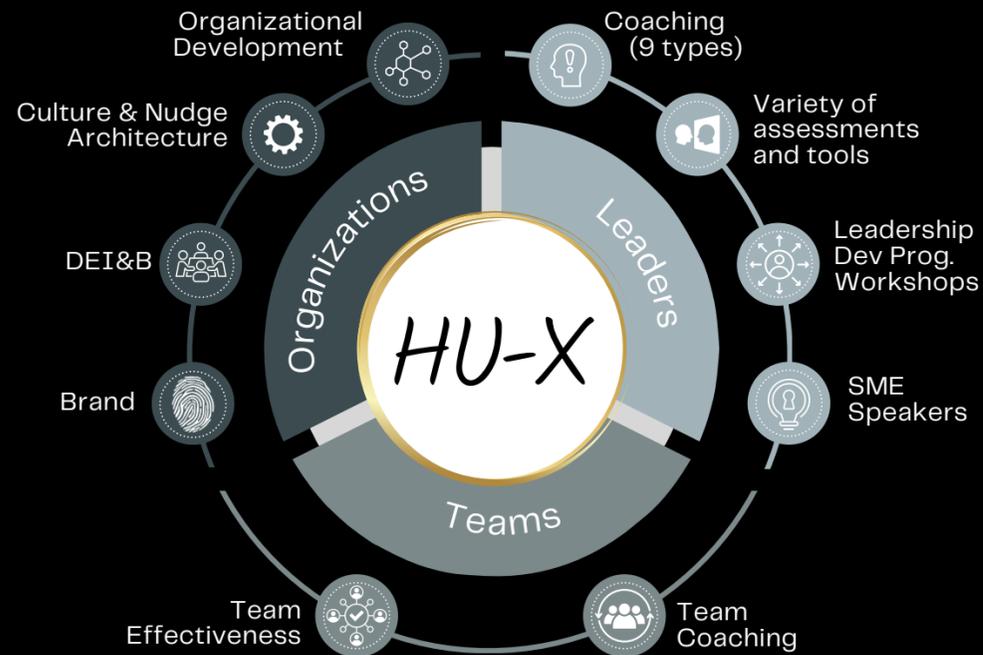


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# MEET HU-X



## WHO WE ARE



90 diverse practitioners from across the globe: LD / OD consultants, designers, executive coaches, professors & deans, SME keynote speakers...

## HOW WE PARTNER



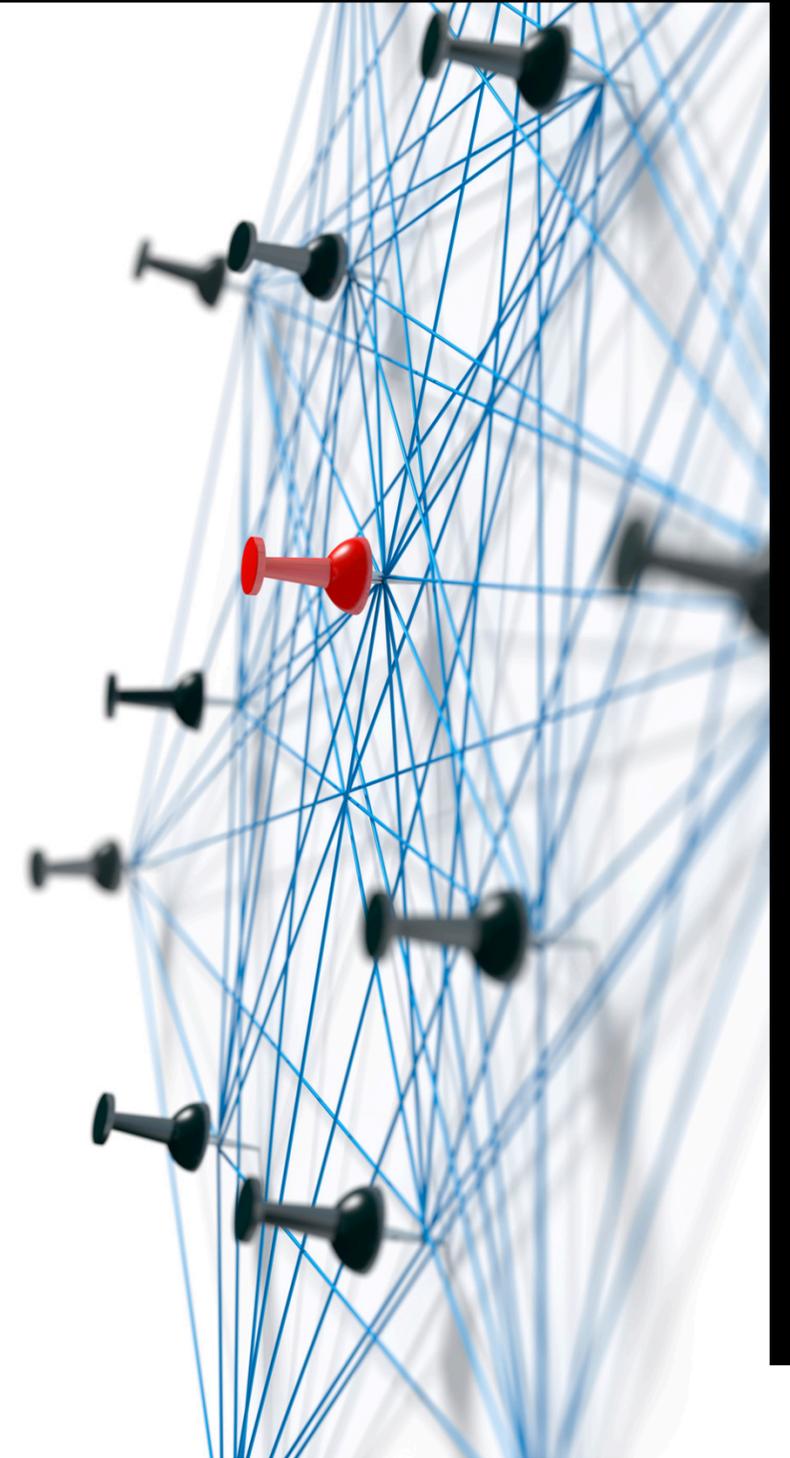
Build your dream team - you select the right practitioners for your project

# DESIGN PRINCIPLES

- 1. Experiential Learning:** The program will prioritize hands-on activities, simulations, and real-world applications to maximize engagement and retention.
- 2. Practical Application:** Focus on developing skills and habits that can be immediately implemented in the participants' daily work.
- 3. Scalability and Outcome-Oriented:** The program is designed to be scalable across cohorts and measured by tangible outcomes and impact.
- 4. Customization:** The program will be tailored to address specific challenges and opportunities within your organization.
- 5. Systems Thinking:** Emphasize understanding the interconnectedness of different parts of the business and how decisions impact the broader system.
- 6. Agile and Future-Oriented:** Incorporate principles of agility, experimentation, and adaptation in an AI-driven world.

# WHAT WE HEARD

- Clarifying what it means **to be a senior leader at CRB**
- Accelerating readiness to step into **larger roles**
- Engaging in **self-reflection** and **personal development**
- Developing **leadership habits** that contribute to team and organizational success
- **Leading change** and executing strategy through **ambiguity**
- **Innovating** in a highly **regulated** and exponentially evolving business environment
- **Breaking down silos** and fostering cross-functional collaboration among senior leaders



# PROGRAM APPROACH

The Senior Leadership Program at Cross River Bank is designed to empower leaders to grow on three levels: individually, as a cohort, and through team and organizational impact—while deepening their networks across the bank.

## Core Approach

At the heart of the experience is the opportunity to work on actual issues and learn from each other. Each participant will be asked to bring a personal business case or leadership challenge they are currently facing—something unresolved and meaningful to them. This case will serve as a focal point for peer feedback and coaching throughout the program.

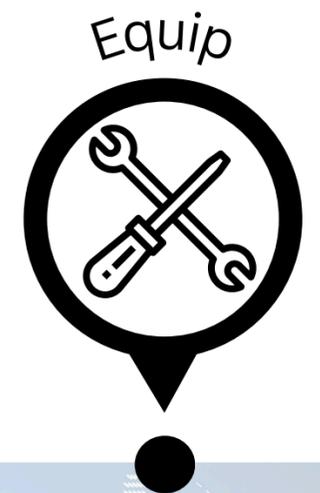
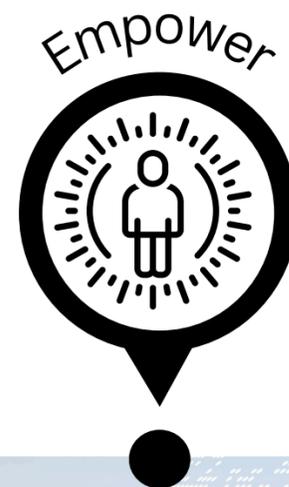
## Program Objectives

The program aims to:

- Develop core leadership skills
- Expand and strengthen participants' network
- Address Cross River Bank's need for holistic thinking, strategic leadership, and cross-functional collaboration
- Break down silos and foster greater collaboration among senior leaders

## Practical and Applicable

- **Work on Real Problems:** Participants will tackle live challenges from their own work environments. Through structured conversations with peers, they will gain new insights and potential solutions.
- **Build New Skills and Habits:** Case studies will serve as a catalyst for developing new leadership practices and behaviors.
- **Develop Leader-as-Coach Capabilities:** Participants will practice coaching each other in ways that they can immediately apply with their own teams.



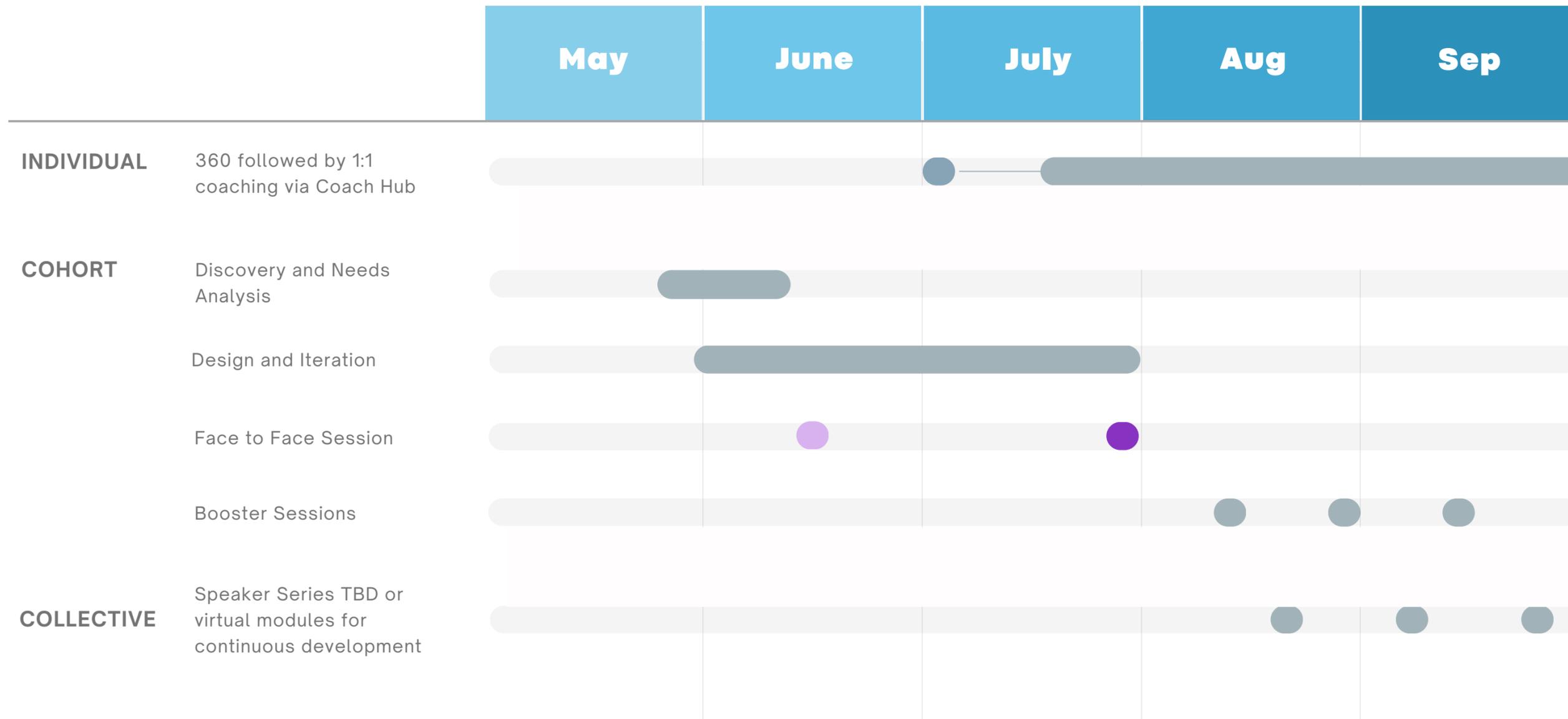
# POTENTIAL PROJECT TIMELINE 1

Benefits:

- Alignment with current projected timeline

Drawbacks:

- Entering summer and vacation season. Risk of delays with running the 360 and individual coaching as well as conflicts scheduling the NY session, booster sessions, and speaker series
- Eric Berger is unable to facilitate.



# POTENTIAL PROJECT

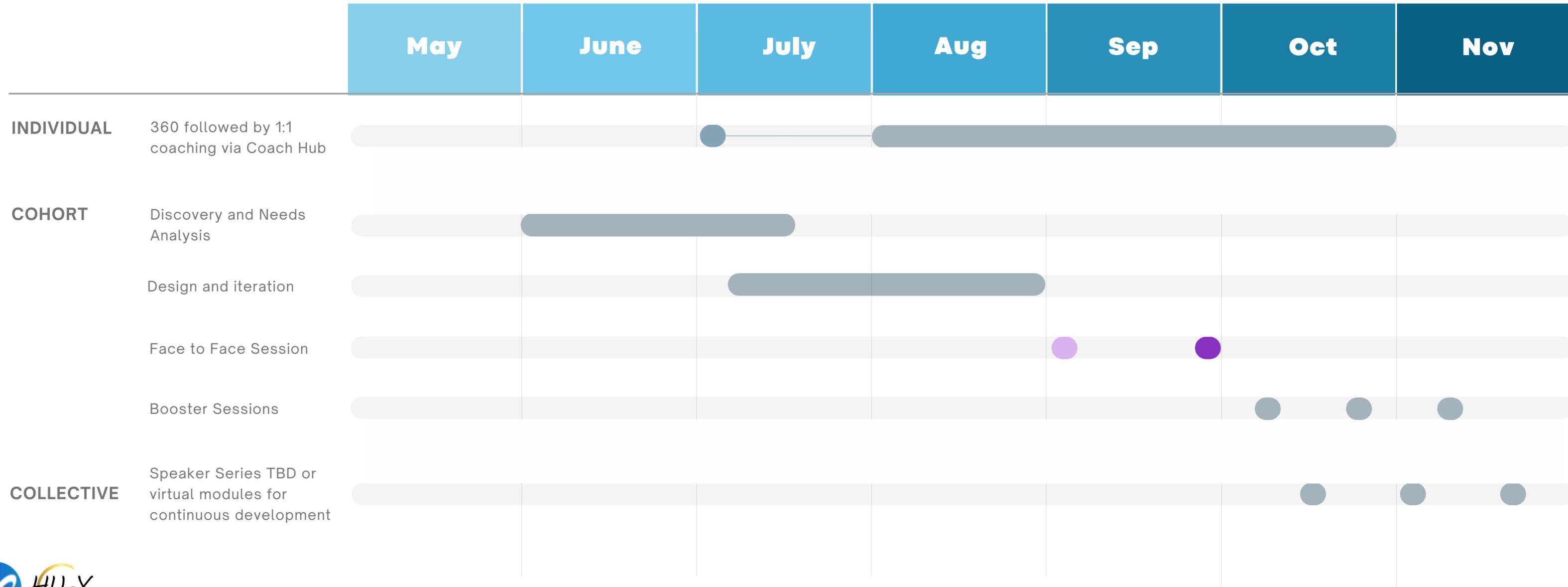
## TIMELINE 2

Benefits:

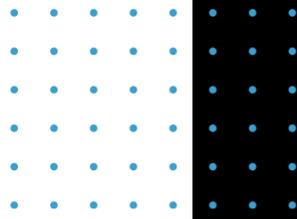
- Allows enough time to make adjustments after the pilot
- Easier to schedule and less risk of attrition due to the summer season
- Eric Berger can deliver both the pilot and the first session.
- May help in providing participants more time to complete the 360 assessment

Drawbacks:

- Pushes the pilot and delivery further out



# NY PILOT DRAFT AGENDA



## PREWORK

Template to think through, describe, and bring with them their own challenge.

## AM - CONTEXT, CHALLENGE, COURAGE

8:30-9:30

### CEO KICKOFF + DEBRIEF + SETTING THE TONE

**CEO:** \* Why are we here? \* Organizational strategic direction (share something new, even small). \* Creating value for our clients. \* Expectations of senior leaders in the room. \* You will take this company into its future...

**Debrief:** What did we hear from the CEO? How might we get the most out of this one day together?

9:30-10:00

### INTRO TO PARTICIPANT BUSINESS CHALLENGES

Participants share their challenges with their table team

10:00-10:15 Break (15min)

10:15-12:00

### SIMULATION

An immersive, hands-on simulation experience surfacing underlying dynamics that influence decision-making, collaboration, and business outcomes.

Key themes: ownership, breaking down silos, scaling vs. sustainability, customer-centric innovation

12:00-1:00

Lunch (60min)

## PM - REWIRING FOR STRATEGIC LEADERSHIP

1:00-2:30

### DEBRIEF + MINDTRAPS

1. **Debrief** the simulation. What came up for you? What were the challenges? What mindsets may have kept you from seeing the big picture / making better decisions, etc.
2. Surfacing the three **Mindtraps** and habits to unlocking them through participants' experiences in the sim

2:30-2:45 Break (15min)

2:45-5:00

### THREE HABITS FOR SENIOR LEADERS

1. **Seeing the bigger picture** – From Control to Systems Thinking
2. **The power of better questions** – From Rightness to Curiosity
3. **Breakthrough conversations** – From Simple Stories to Multiple Perspectives

5:00-5:30

### TURNING INSIGHTS INTO ACTION

Share commitments with table team

5:30-6:30

Networking with Senior Team

6:00-9:00

Reception & Dinner with C-suite



# MAPPING MODULES TO DISCUSSED OBJECTIVES

Module	CORE ELEMENTS					
	Breaking Down Silos	Strengthening Connectivity & Network	Individual and Team Leadership	Leading Change	Strategy alignment and execution	Future-Focus
Setting the Stage/CEO	√			√	√	√
Business Leadership Challenge	√	√	√	√	√	
Simulation	√	√	√	√	√	√
Mindtraps	√		√	√	√	√
Three Habits for Senior Leaders: (1) From Control to Systems Thinking	√	√	√	√	√	√
Three Habits for Senior Leaders: (2) From Rightness to Curiosity		√	√	√		
Three Habits for Senior Leaders: (3) From Simple Stories to Multiple Perspectives		√	√	√	√	√
Turning Insights Into Action	√	√	√	√	√	√
Hu-X 10 Leadership Habits - TBC for booster sessions	√		√	√		√

# Investment

DESIGN	# Consultants	Day Cost / Consultant	# Days	Total Cost
<b>Needs analysis + Design (4 days):</b> <ul style="list-style-type: none"> <li>Business strategy alignment &amp; contextualization</li> <li>Interview key stakeholders</li> <li>Build overall program arc (flow and structure)</li> <li>Customize program design specifically for CRB needs</li> <li>Material development (e.g., workbooks, takeaway cards, customized games), if applicable</li> </ul>	2	\$4,000	4	\$32,000
<b>Total Design:</b>				<b>\$32,000</b>
DELIVERY	# Consultants	Cost per day	Days	Total Cost
<b>FACE TO FACE SESSION</b>				
<b>Face to Face Session:</b> <ul style="list-style-type: none"> <li>Facilitate program from the front of the room and as MC, threading together the program arc</li> <li>Stay attuned to participants and adjust content real-time, when needed</li> <li>Fuel insights, debrief and synthesize, coach for action</li> </ul>	2	\$7,500	1	\$15,000
<b>Onsite prep + connecting with leaders on the evening before the program</b>	2	\$7,500	0.5	\$7,500
SMALL GROUP DEVELOPMENT & CONTINUOUS LEARNING	# Coaches	Cost per session	Sessions	Total Cost
<b>Booster Sessions (continuous learning):</b> <ul style="list-style-type: none"> <li>3 sessions with the full group (2hr in-person or 1.5 virtually)</li> </ul>	1	\$5,000	3	\$15,000
<b>Total Hu-X Delivery:</b>				<b>\$37,500</b>
Sim (Recommendations)	# Seats	Cost per seat	Sessions	Total Cost
<b>*Charged at cost:</b> Estimated cost for simulation via Forio (Harvard, Emory, Colorado Boulder)	24	\$165	1	\$3,960
<b>Total Base Cost:</b>				<b>\$73,460</b>
ADD ONS	# SMEs/Consultants	Cost per session	Sessions	Total Cost
<b>COHORT DEVELOPMENT: VIRTUAL SMEs / WORKSHOPS</b>				
<b>Virtual SME* keynotes and workshops</b> (e.g., AI and Ethics, AI Regulatory Environment, AI Innovation, AI Talent Readiness and Planning, Conflict Resolution)	3	\$15,000 - \$50,000	3	\$45,000 - \$150,000
GROUP COACHING	# Coaches	Cost per session	Sessions	Total Cost
2 sessions per group X 5 groups (4 or 5 in each group) = 10 (2hr in-person / 1.5hr virtual)	1	\$2,500	10	\$25,000
INDIVIDUAL COACHING	# Participants	Cost per session	Sessions	Total Cost
3 coaching sessions per participant	N/A	\$550	3	N/A

- Price does not include T&E or any materials (workbooks, etc.) which will be charged at cost.
- SME pricing may vary depending on their pricing and degree of customization.



# SIMULATIONS FOR CONSIDERATION

COMPANY		KEY TOPICS	DURATION	COST
<a href="#">SimGate (Regis)</a>	Customizeable			TBD
Forio + <b>Harvard Business School</b> (Prof. Michael Roberto & Prof. Amy Edmondson)	<a href="#">Everest</a>	Teamwork & Leadership <ul style="list-style-type: none"> <li>• Leadership, Team Building &amp; Strategy Forming</li> <li>• Communication &amp; Organizational Behavior</li> <li>• Group Dynamics &amp; Decision-Making</li> <li>• Psychological Safety</li> </ul>	2.5-3.5hr	\$165/pp
Forio + <b>Emory University Business School</b>	<a href="#">Easy Meals</a>	Leadership & Communications <ul style="list-style-type: none"> <li>• Leadership</li> <li>• Communication</li> <li>• Team Dynamics</li> <li>• Collaboration</li> <li>• Crisis Management</li> </ul>	2.5-3.5hr	\$165/pp
Forio + <b>University of Colorado Boulder</b> (Prof. Matthew Koschmann)	<a href="#">Wildfire</a>	Group Communication & Decision-Making <ul style="list-style-type: none"> <li>• Group Decision-Making</li> <li>• Communication</li> <li>• Conflict Resolution</li> <li>• Teamwork &amp; Leadership</li> <li>• Time &amp; Crisis Management</li> </ul>	2.5-3.5hr	\$165/pp

- Forio simulations charged as cost
- SimGate will require customization - making it particularly meaningful/effective - any may involve additional costs associated with consultants' design time

# NEXT STEPS

## 01 Review

Review the proposal and finalize details with Hu-X.

## 02 Design

Upon agreement, Hu-X begins needs analysis and program design.

## 03 Pilot

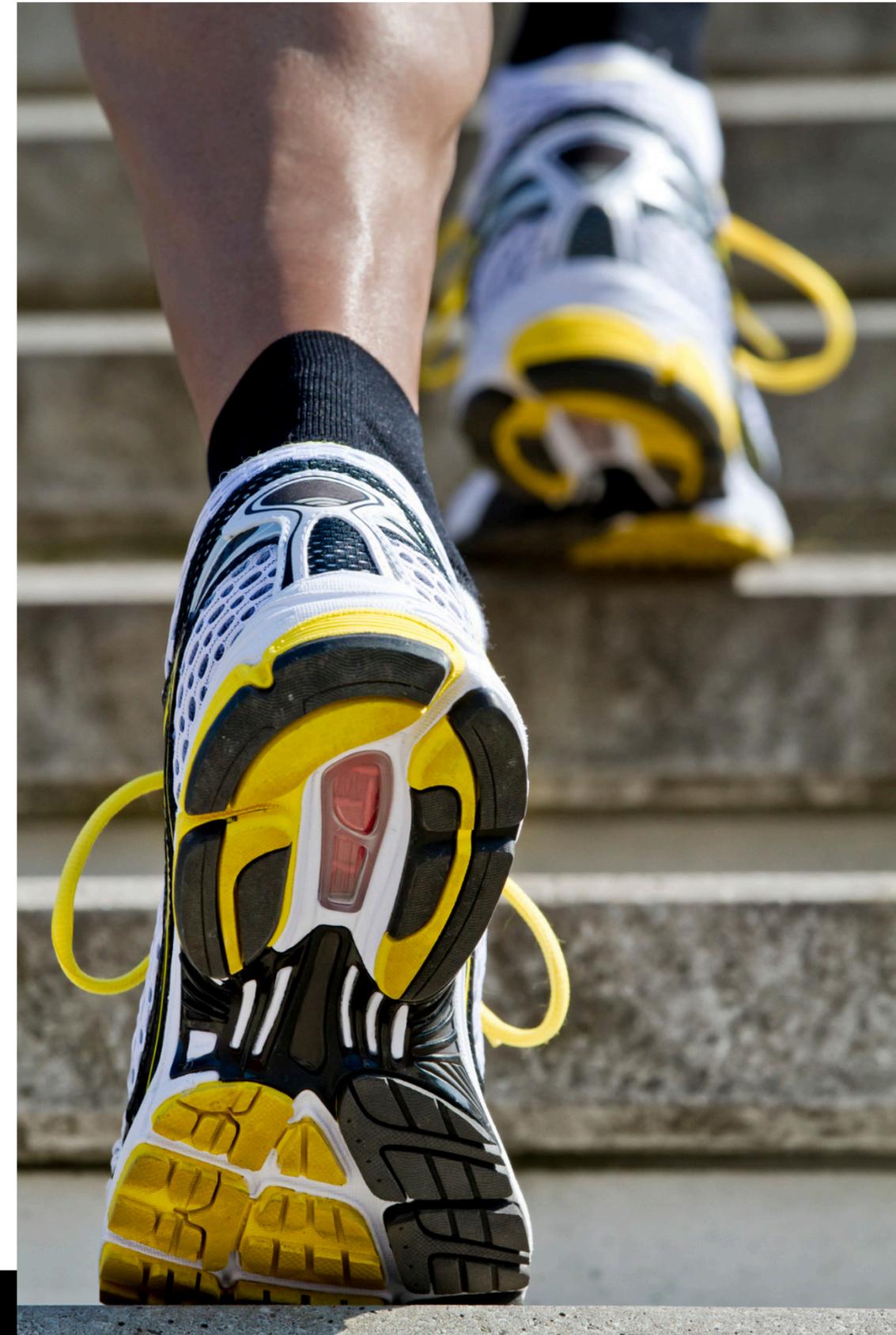
Conduct a pilot session to surface insights and refine the program.

## 04 Select

Identify and confirm facilitators to lead sessions across the USA, UK, and Israel.

## 05 Run

Deliver the full program in selected regions.



# SELECTED PRACTITIONERS

## Proximity to NY

Name	Background	Region
Kelly Bean	Former Dean, Executive Development, UCLA	US, VA
→ Eric Berger	Former Chief Learning Officer, Visa Adjunct Professor, Georgetown Law	US, NY
→ Kevin Engholm, Psy. D	Former Head of Executive Development, Citi	US, NJ
Noam Farago	Senior Director of Talent Management and Organizational Development, PTC Therapeutics	US, NJ
Jay Moore	Former Chief Learning Officer, GE	US, CT
Valerie Morel	Former Head of Global Transformation, Prudential	US, NY
Jessica Powers	Seasoned Consultant, Facilitator, and Coach	US, NY
Shonna Waters, PhD	Former Vice President of Executive Advisory at BetterUp	US, VA





## Kelly Bean

### VA, USA

- ✦ LEADERSHIP & TEAM COACH
- ✦ DESIGNER
- ✦ FACILITATOR
- ✦ PROGRAM DIRECTOR

#### Education:

- Ed.D (2026), Organizational Leadership, Franklin University
- MA, Human Resources, University of South Carolina
- BA, Business Administration, University of South Carolina

#### Certifications:

- Coaching, FLOW Coaching Institute
- Presence Based Coaching, Doug Silsbee
- Hogan
- Korn Ferry 360
- Senior Birkman Consultant
- Leadership Versatility Index
- TalentSage Suite of Assessments

Kelly has led initiatives in many organizations from start-ups to Fortune 500s in the areas of personal leadership development, executive development, team effectiveness, organizational development, strategy formulation and talent management. She has led the design and delivery of global executive development programs for organizations such as Sony, AECOM, Panasonic, Princess Cruises, HiBob, Bacardi, USArmy, Coca-Cola, Avanade, and Smith's as well as many others.

She held Dean and CEO positions at four of the top global business schools, leading non-degree executive education at UVA Darden, UCLA Anderson, WashU Olin and WashU at Brookings, and Emory Goizueta. Kelly was responsible for leading P&Ls of up to \$50M and teams of up to 75 people. She is the past chair of the board of UNICON, a global consortium of executive education organizations, and regularly researches, teaches, and consults in the higher-education industry. She is currently an independent director at Kepner-Tregoe and has an Executive-in-Residence appointment at the University of Miami Herbert Business School.



## Eric Berger

NY, USA

- ✦ PROFESSOR
- ✦ CONFLICT RESOLUTION

### Education:

- MPA, Harvard University
- MTS, Harvard University
- BA, Queen's University

### Certifications:

- Hogan
- Certified Agile Leadership (CAL-1)
- Lominger 101

Eric Berger was the Chief Learning Officer at Visa, where he lead strategic learning initiatives to drive organizational growth and leadership excellence. Eric also serves as an adjunct professor at Georgetown Law, sharing his expertise in negotiation, leadership, and organizational development. Eric joined Visa in 2023 after a distinguished 12-year tenure at Citi, where he held senior positions overseeing Leadership and Executive Development as well as Consumer Bank Learning. His work at Citi was instrumental in shaping the company's leadership pipeline and fostering a culture of continuous learning.

Earlier in his career, Eric was a Senior Consultant in Deloitte Consulting's Human Capital practice and managed the Kennedy School Negotiation Project at Harvard University, where he focused on bridging research and practice in negotiation and conflict resolution, particularly in complex international disputes. As a former Director of External Training at the Harvard Mediation Program, he has delivered negotiation and conflict management training for senior executives and public leaders worldwide.

Eric is passionate about culture change and is dedicated to building organizations' capacity to attract, develop, and empower leaders who drive measurable impact.



## Kevin Engholm

NJ, USA

- ✦ LEADERSHIP & TEAM COACH
- ✦ LEADERSHIP AND ORGANIZATIONAL DEVELOPMENT

### Education:

- Psy D., Organizational Psychology, Rutgers University
- MA, Organizational Psychology, Rutgers University
- BA, Psychology, magna cum laude, Bethel College

### Certifications:

- Integral Coaching, New Ventures West
- Hogan Personality Assessments, Hogan Assessments
- Korn Ferry Leadership Solution (KFLS), Korn Ferry
- Styles of Influence (SOI), TeamSight
- Organization Workshop and Merging Cultures Workshop, Barry Oshry
- Emotional Competence Inventory (ECI), Korn Ferry
- MBTI, OKA
- Managing Organizational Transitions, Linkage, Inc.

Kevin Engholm is an internationally experienced Talent, Learning, and Diversity expert, as well as an Executive Coach, with a career spanning nearly two decades at Citi. Most recently, Kevin served as LATAM Head of Talent, Learning, and Diversity, where he led a team of 93 professionals across 21 countries to deliver strategies that supported over 51,000 employees. His work emphasized advancing high-potential and diverse talent, developing regional programs, and achieving operational efficiency, reducing costs while maintaining impact.

Kevin also held roles such as Head of Learning for Citi's Institutional Clients Group, overseeing learning strategies for 125,000 employees, and Director of Executive Development, where he shaped flagship leadership programs and executive coaching initiatives. Prior to Citi, Kevin spent nine years at Prebon Yamane in roles that included Training and Organizational Development and Chief of Staff for Latin America.



## Noam Farago

NJ, USA

- ✦ ORGANIZATIONAL DEVELOPMENT
- ✦ DESIGNER & FACILITATOR
- ✦ EXECUTIVE & LEADERSHIP COACH

### Education:

- MA, Organizational Psychology, Columbia University
- BA, Psychology and Communication, University of Haifa

### Certifications:

- Gallup-Certified Manager, Gallup
- Gallup Strength Coach, Gallup
- HBDI

Noam Farago is a distinguished professional in Organizational Development and Talent Management, with a career spanning leadership roles across top organizations. Currently, as Senior Director of Talent Management and Organizational Development at PTC Therapeutics, he drives strategic initiatives to build leadership capabilities and align talent strategies with business needs. At Amdocs, he managed organizational development efforts across multiple regions, supporting 7,000 employees and providing facilitation and coaching to senior leadership teams. Earlier in his career, he worked with Ketchum Change, where he focused on helping organizations enhance employee engagement, internal communications, and change management.

Noam is passionate about creating impactful talent and leadership solutions that foster long-term organizational growth. He emphasizes collaboration and innovation, working closely with teams and stakeholders to address complex challenges. Known for his ability to design tailored programs and initiatives, he has consistently delivered results that enhance organizational effectiveness and drive meaningful change.



## Jay Moore

### CT, USA

- ✦ LEADERSHIP DEVELOPMENT
- ✦ CHANGE MANAGEMENT
- ✦ LEARNING STRATEGY DEVELOPMENT AND IMPLEMENTATION

#### Education:

- B.S. in Marketing from Siena College
- MBA from Rensselaer Polytechnic Institute
- M.S. degree in e-Commerce from the University of Maryland University College
- Certified Master Black Belt in Six Sigma
- Currently enrolled at Brown University's Leadership & Coaching program with anticipated completion in the spring of 2025.

Jay is a seasoned executive with over 30 years of experience at GE, where he made significant contributions to the CEO office, Business Unit CEOs, senior executives, and early career program participants. His expertise spans across various critical areas, including oversight of GE's legacy Corporate University "Crotonville" and leading the Separation Management Office for Corporate Learning during GE's historic spin-offs.

As an accomplished Chief Learning Officer, Jay has held diverse business roles in Sales/Marketing, Six Sigma, Global Supply Chain, and Lean & C Suite leadership development. His extensive experience includes designing and delivering programs, as well as developing learning strategies and curricula.

Jay's passion lies in solving complex problems while fostering cultural shifts with diverse teams at scale. He excels in coaching and globally scaling leadership development initiatives, leveraging his deep understanding of organizational dynamics and change management.



## Valerie Morel

NY, USA

- ✦ CONSULTANT & THOUGHT LEADER
  - ORG EFFECTIVENESS
  - ORG DEVELOPMENT
  - TALENT MANAGEMENT
  - CULTURE TRANSFORMATION
- ✦ EXECUTIVE COACH

### Education:

- MA, Social-Organizational Psychology, Columbia University
- MSc, Bachelors of Science and Management, Lyon Graduate School of Business

### Certifications:

- ACC, International Coach Federation
- Certified iCoach Global, Zicklin School of Business
- Team Coaching Certification, ICL
- Hogan Assessment Certification, Performance Programs, Inc.

As Vice President of Employee & Capability Development at Prudential Financial, Inc. Valerie led the global transformation effort of the organization's leadership development brand. Prior to joining Prudential, Valérie led and expanded the Business Transformation & Change Center of Expertise at Bayer North America building Change Management and Divestiture Planning capabilities.

She also worked in the People & Performance Practice of Capgemini Management Consulting, with global clients such as Warner Bros, Pfizer, and National Grid. Valerie co-authored points of view and new development programs, she was a Faculty Member of Capgemini Global University and Bayer Business Consulting Development as well as a Guest Lecturer at Tisch School (NYU, USA), ESA, and Graduate Schools of Business (Lyon, Grenoble, France). She is an Executive Coach at Columbia Business School.



## Jessica Powers

NY, USA

- ✦ EXECUTIVE COACH
- ✦ FACILITATOR
- ✦ FOCUS AREA: LGBTQ+

### Education:

- MA, Organizational Psychology, Columbia University
- BA, Sociology, Oberlin College

### Certifications:

- Korn Ferry 360
- Mediation Teacher, The Independence Project

Jessica Powers is an Executive Coach who works with leaders to create meaningful transformation and sustainable high performance. She has worked with leaders in startups as well as large financial services, media, technology, entertainment, energy, and international development.

Jessica loves working with leaders to deeply connect their personal stories and values with how they lead. She is passionate about helping leaders make a positive and healthy impact on their people and their business from a lens of well-being. Leaders work with her to grow their self-awareness and lead from a deep sense of values and purpose. She often coaches leaders to grow their confidence, lead healthy and engaged teams, navigate difference, and develop emotional intelligence.

Before becoming a coach, Jessica worked in film and music production, and as a fundraiser and event producer for the National Center for Lesbian Rights.



## Shonna Waters

### VA, USA

- \* ORGANIZATIONAL PSYCHOLOGIST
- \* SPEAKER
- \* FACILITATOR
- \* COACH

#### **Education:**

- PhD, Industrial/Organizational Psychology, University of Minnesota
- BA, Psychology, University of Maryland

#### **Certifications:**

- Leadership and Coaching, Georgetown University Institute for Transformational Leadership
- SHRM-SCP
- ACC, International Coaching Federation

Shonna is an experienced technology executive with over two decades of expertise in human capital transformation. Her career includes roles as a university professor, coach, operational leader, researcher, and scientist. Shonna's mission is to make scientific knowledge about individual, team, and organizational performance accessible at scale, driven by the belief that untapped potential fuels growth.

Shonna is the former Vice President of Executive Advisory at BetterUp, where she helps C-level customers leverage science and technology to achieve critical business outcomes. Previously, she led the development of BetterUp's technology alliances and strategic partnerships. Shonna has managed large, complex projects and led diverse global teams.

Throughout her career, Shonna has designed and implemented human capital systems, from pre-hire assessments to performance management and rewards programs for mid to large-sized organizations. Her approach blends science and practice to drive better outcomes for people and businesses. Building and developing people, teams, and businesses is her passion and source of endless reward.

# SELECTED PRACTITIONERS

## ISRAEL



Name	Background	Region	Languages Spoken
Brenda Benaim	Former Head of L&D, Bloomberg	EMEA, Israel	English
Didi Oshrat	Psychologist and OD Consultant	EMEA, Israel	English, Hebrew
Merav Rozenman	Former Israel Defense Forces	EMEA, Israel	English, Hebrew



## Brenda Benaim

### Tel Aviv, Israel

- ✦ OD CONSULTANT
- ✦ FACILITATOR
- ✦ TEAM DEVELOPMENT
- ✦ PROGRAM DESIGN
- ✦ INDIVIDUAL & TEAM COACH

#### Education:

- MA, Technology in Education, University of Sydney
- Graduate Diploma of Education, Griffith University
- BA, Applied Linguistics & Communications, Bond University

#### Certifications:

- PSI Emotional Intelligence
- Insights Discovery
- Hogan Assessments
- NEWS Team Coaching and Training
- Design Thinking Facilitator

Brenda is a passionate and sought after Organizational Development Consultant & Facilitator. With over 20 years of experience in leadership roles across the globe such as Global Head of Leadership & Talent Development at Bloomberg, Business Development Executive at IBM, Morgan Stanley, and Organizational Development and Talent Development consultant at Amdocs, Wix, Google and others, Brenda developed her brand as a thought-leader in OD and brings significant value relating to leadership development and employee growth & experience.

Brenda is best known for her ability to connect with people at all levels, inspiring teams and individuals to grow and challenge themselves, while focused on improving employee productivity and organizational efficiencies.

Her multicultural background (American, Australian and Israeli) coupled with her global corporate experience gives Brenda the ability to relate with a diverse set of employees, and creates the necessary safe environment for valuable discussions, learning and development.



## Didi Oshrat

### Israel

- ✦ OD CONSULTANT
- ✦ FACILITATOR
- ✦ COACH

#### **Education:**

- MA, Organizational Psychology, University of Haifa
- BA, Psychology, Tel Aviv University

#### **Certifications:**

- Everything DiSC
- Organizational Coach, Momentum Group
- Facilitator, The Five Behaviors

Didi Oshrat is a dynamic organizational development coach with over 15 years of transformative experience helping leaders and teams unlock their full potential. As a seasoned psychologist and executive consultant, he specializes in turning organizational challenges into opportunities for growth and collaboration. Oshrat's unique coaching methodology bridges psychological insights with practical business strategies, enabling professionals to lead without formal authority and build powerful workplace relationships. His approach is laser-focused on helping organizations create cultures of open dialogue, innovation, and continuous development. Through tailored workshops, executive coaching, and strategic team-building interventions, he empowers leaders to transform their teams from the inside out.

What sets Didi apart is his ability to design change platforms that not only address immediate organizational needs but also create sustainable mechanisms for ongoing growth. His clients consistently praise his intuitive understanding of organizational dynamics, his engaging facilitation style, and his commitment to delivering actionable, high-impact solutions that drive real, measurable transformation.



## Merav Rozenman

### Israel

- ✦ EXECUTIVE & TEAM COACH
- ✦ DESIGNER AND FACILITATOR

#### Education:

- PhD (est. 2026), Psychology, Reichman University
- MA, Organizational Psychology
- BA, Honorary Interdisciplinary Program

#### Certifications:

- Organizational Psychologist, IPA
- Certified senior group facilitator

Merav has extensive experience in leadership consulting, having worked with diverse organizations, including the Israel Defense Forces (IDF) as a Senior Consultant. She has also contributed her expertise at AKT Human Capital Solutions. Her approach combines theoretical insights with practical applications, ensuring that her interventions are both thought-provoking and actionable. Merav is known for her ability to adapt workshops to meet specific organizational needs, earning her high praise for professionalism and methodological rigor.

Through her work, Merav has made a lasting impact on organizations by helping them navigate disruption, enhance employee engagement, and build resilient leadership frameworks. Her unique blend of academic research, practical experience, and thought-provoking insights positions her as a leading voice in the field of organizational psychology and leadership development.

# SELECTED PRACTITIONERS

## Proximity to UK

Name	Background	Region
Elsie Akinsanya	Former MD, Citi	England
Philip Brady	Former Head of Manager Capability, Citi	Ireland
Neeve Guinnane	Former HR Leader, Meta, LinkedIn	Ireland
Alex Lazarus	Held leadership roles at Walt Disney, Virgin, Fox	London
Michal Malka-Perry	Former HR Director, Amdocs	London
Rachel Mooney	Over 15 years HR leadership experience, Google, Vodafone	London
Doug Scott	Former Head of Executive & Director Development with GE's Leadership University "Crotonville" in New York	England



## Elsie Akinsanya

### England, UK

- ✦ LEADERSHIP & TEAM COACH
- ✦ FACILITATOR

#### Education:

- MA, Human Resource Management – University of Westminster (UK)
- BA (Honors student) in English and Linguistics – University of Jos (Nigeria)

#### Certifications:

- Coaching and Mentoring – Oxford Brookes University
- Fellow – Chartered Institute of Personnel & Development

Elsie was a Managing Director and Global Head of HR at Citibank, responsible for over 2500 employees in 90+ countries globally. As a member of the Executive Committee, she was a trusted advisor to the CEOs and senior leadership of the businesses. Most recently, Elsie was the HR Head for Emerging Markets, responsible for 29 countries across Africa and the Middle East. Before Citi, Elsie worked for Fidelity International and Quintiles, among other firms. With her global experience, Elsie is able to coach those from different geographies and cultural contexts sensitively.

Elsie was named as a top 100 Ethnic Minority Role model for two consecutive years in the [Financial Times](#). Elsie focuses on providing executive coaching services for senior professionals as they progress in their career journey. Specifically over the past decade, her focus has been coaching senior professionals' transition into executive leadership positions and working with them to connect with their teams and C-suite courageously and authentically.



## Philip Brady

### Dublin, Ireland

- ✦ EXECUTIVE COACH
- ✦ LEADERSHIP DEVELOPMENT
- ✦ KEYNOTE SPEAKER

#### Education:

- BSc, Finance and Venture Management, Maynooth University

#### Certifications:

- Diploma in Life and Business Coaching, Irish Life Coach Institute
- Personal Trainer Level 3, Health and Physical Education, ECA Belfast

Philip is a leadership development expert with over 10 years of experience in coaching, executive development, team effectiveness, and succession planning. During his tenure at Citi, Philip led the EMEA Leadership Development curriculum, working with leaders up to one level below the regional CEO. He coached senior leaders on high-potential and succession lists, facilitated leadership programs for emerging leaders, and consulted with the EMEA Operations and Technology Senior Leadership Team supporting a population of over 14,000 employees. In his last role at Citi, he served as Global Manager Capability Practice Area Lead, driving global learning initiatives, including the rollout of Diversity, Equity, and Inclusion (DEI) programs using cutting-edge adaptive learning technologies like Area9.

Philip is known for his strategic mindset, collaborative style, and ability to adapt his approach to individual and team needs. His coaching clients include senior leaders from global financial institutions, consulting firms, law enforcement, and technology companies, reflecting his broad expertise in leadership development.



## Neeve Guinnane

London, UK + Portugal

- ✦ TEAM AND EXECUTIVE COACH
- ✦ GROUP AND COMPANY EVENT FACILITATOR
- ✦ DESIGNER

### Education:

- MA in Human resources Management, Kingston, UK
- BA, University of Galway, Ireland

### Certifications:

- Diploma in Coaching, Positive Success Group
- Advanced Diploma in the Neuroscience of coaching, World Association Coaching with Neuroscience
- Mindfulness
- Reiki Master
- Yoga Instructor

Neeve has over 20 years of experience developing leaders in top global tech companies such as Meta and LinkedIn. Most recently, she was Director Human Resources Business Partner for EMEA and LatAm at LinkedIn partnering with Clients across the Globe, coaching 'C Suite' Executives, Senior VPs and Women in Leadership.

Neeve helps leaders get closer to their career and life goals through discovery conversations, assessing what is and what might be. She uses various coaching techniques and her deep understanding of the neuroscience of growth, change, and creating new habit that stick.



## Alex Lazarus

London, UK

- ✦ KEYNOTE SPEAKER
- ✦ LEADERSHIP & TEAM COACH

### Education:

- MSc in Coaching & Behavioural Change at Henley Business School
- BA in Humanities

### Certifications:

- Diploma (Distinction) Coaching for Performance, The Coaching Academy
- CPD Neuroscience in Coaching, The British Psychological Society



Alex Lazarus is a global consultant supporting leaders and their organisations to operate optimally in the fast-changing marketplace. In business, Alex worked at Richard Branson’s Virgin HQ, Fox, and Walt Disney. As an award-winning Marketing Director, her role included leading teams, strategy, launching TV channels, awards, franchise management and partnerships.

Alex partners with leaders and executive teams worldwide to catalyse personal and organisational transformation. Her clients –often under intense pressure and immense responsibilities in dynamic environments–benefit from her supportive style, rigorous training, cutting-edge diagnostics and creative strategies to optimise performance. Through her bespoke approach, Alex empowers her clients to expand their behavioural and emotional range, enabling them to achieve goals and tackle leadership challenges with curiosity and grace.



## Michal Malka-Perry

### London, England

- ✦ LEADERSHIP DEVELOPMENT
- ✦ ORGANIZATIONAL EFFECTIVENESS
- ✦ ORG EFFECTIVENESS STRATEGIES

#### **Education:**

- MA, Consulting and Organizational Development, The college of Management , Tel Aviv
- BA, Behavioral Sciences and HR Management, The college of Management , Tel Aviv

#### **Certifications:**

- Group Facilitation with Arts
- Certified Coach, N.E.W.S international
- Certified Lumina Practitioner
- Organizational Constellation practitioner
- Buddhist yearly program, Broshim
- Adaptive Leadership course, CLA

Michal Malka Perry is a seasoned organizational consultant and leadership coach with over 18 years of global experience spanning technology giants, dynamic startups, and multinational corporations. She has held senior roles at companies like Amdocs, where she led HR and organizational development teams supporting over 14,000 employees. Michal specializes in shaping workplaces through strategic organizational development, leadership coaching, and the implementation of transformative programs. She has designed and facilitated global leadership programs, coached C-level leaders, and advised senior management on strategic and change processes.

Michal leverages strategic insight and personalized coaching to help leaders define their vision, align teams, and drive lasting success. She combines strategic thinking with practical program design, enabling leadership excellence and high-performing teams. Committed to fostering impactful workplace cultures, she partners with organizations to create environments where leaders and teams excel.



## Rachel Mooney

### London, England

- ✦ PEOPLE STRATEGIES
- ✦ LEADERSHIP DEVELOPMENT
- ✦ ORG EFFECTIVENESS STRATEGIES

#### Education:

- MS, Applied Neuroscience, King's College London
- MBA, Org Change & Innovation, The Open University
- BA Hons, Psychology, Univ College Dublin

#### Certifications:

- Certificate in NeuroCoaching, NeuroLeadership Institute

Rachel Mooney has over 15 years of experience in human resources across various global organizations, including Google and Vodafone. She has a proven track record of driving business impact through strategic people and organizational initiatives, effectively navigating environments from start-ups to rapid scale-ups and mature turnarounds.

With a background in neuropsychology, Rachel utilizes innovative, science-based interventions to foster high-performing teams and leaders. She excels in dynamic settings where innovation and continuous improvement are essential. Her previous roles include significant positions at Snow Software, where she developed organizational and culture strategies, and Vodafone, where she served as HR Director for group corporate functions and shared services.

Rachel's expertise in applying neuropsychological principles enhances her ability to improve organizational performance and leadership effectiveness.



## Doug Scott

### England, UK

- ✦ LEADERSHIP DEVELOPMENT EXPERT
- ✦ FACILITATOR

#### **Certifications:**

- Leadership and Coaching, Georgetown
- University Institute for Transformational
- Leadership
- SHRM-SCP
- ACC, International Coaching Federation

Doug is an accomplished business leader with deep experience and a background in psychology, positioning him at the forefront of Leadership Development and Coaching. He served as a Leader of Executive & Director Development with GE's Leadership University "Crotonville" in New York. During his tenure at GE, which spanned over 10 years, Doug held roles such as Global Manager of Learning & Development and Commercial Program Manager. He was responsible for Corporate Commercial Leadership Development across EMEA and CIS. Earlier in his career, while at AstraZeneca, Doug led a southern region leadership coaching team. He was responsible for coaching and implementation of sales strategy across managers and their reports.

Doug has an enviable track record in developing leaders across the world, in many industries and at all levels. His style dissolves barriers and allows change to happen swiftly and sustainably. A certified Neuro Linguistic Programming (NLP) Master Practitioner, he creates clarity from confusion, helping you see the simple from the complex. Doug's humble yet powerful style delivers engaging and transparent communications at all levels, from C-Suite & Board to Emerging and Future leaders.

# SUBJECT MATTER EXPERTS

## ARTIFICIAL INTELLIGENCE

Name	Background	Speaking Topics	Region
Nick Davis	#1 Best selling author, <i>Future Ready</i> , Faculty chair at Singularity University, Chief Platform Officer of the Mid-Ohio Food Collective	Innovation	US, OH
Ethan Mollick, PhD	Wharton Professor renowned for his expertise in innovation, technology, and entrepreneurship	AI and it's Impact on Work, Education, Entrepreneurship, Innovation, and more	US, PA
Rob Nail	Innovator and Entrepreneur, Advisor to Stanford University Innovation Center, former CEO of Singularity University	Exponential Technologies and Their Impact, Future of work, Designing and Communicating the Future of AI, Leading in the Age of Disruption	US, CT
Phanish Puranam, PhD	Professor at INSEAD and the London Business School. AI expert.	AI for Business Leadership	APAC, Singapore
Lynn Wu, PhD	Wharton Professor specializing in transformative impact of emerging technologies on business and society as well as AI and regulations.	AI in the Workplace	US, PA



## Nick Davis

OH, USA

✦ FUTURE READY WORKSHOP

### Education:

- B.S., Sustainability Studies, Harvard University

### Certifications:

- Cybersecurity for Managers, MIT
- Data Science, Columbia University
- Open Innovation and Corporate Entrepreneurship, Esade
- Advanced Management, UCLA

Nick Davis is Chief Solution Officer at Forbes Ignite and Chief Platform Officer of the Mid-Ohio Food Collective, a Feeding America member foodbank. Nick also serves as the Faculty Chair of Corporate Innovation at Singularity University where he directs the research and thought leadership development around Corporate Innovation. Nick is author of the Amazon #1 Best Seller Future Ready: A Changemakers Guide to the Exponential Revolution.

For the past 15 years Nick has worked in a combination of Executive Education, Corporate Innovation, Venture Capital, and building and leading multiple high growth startups. Nick is a recognized thought leader in corporate innovation management and strategy, civic and social innovation, as well as entrepreneurship.

Previously, Nick was Director of Corporation Innovation at RocketSpace, External Innovation Leader for PWC in the US, and Co-Founder of Scalefunder, Inc., which was acquired by Ruffalo Cody in 2014. He is also a veteran of the US Navy where he worked in Military Intelligence.



## Ethan Mollick

PA, USA

- ✦ KEYNOTE SPEAKER
- ✦ PROFESSOR AND AUTHOR
- ✦ AREA OF EXPERTISE: AI

### Education:

- PhD, MIT Sloan School of Management
- MS/MBA, MIT Sloan School of Management
- BA, Harvard

Ethan Mollick is the Ralph J. Roberts Distinguished Faculty Scholar, Rowan Fellow, and Associate Professor at the Wharton School of the University of Pennsylvania, where he studies the effects of artificial intelligence on work, entrepreneurship, and education. His academic research has been published in leading journals, and his work on AI is widely applied, leading him to be named one of TIME Magazine's Most Influential People in Artificial Intelligence. Ethan also writes to a wider audience about AI, including in his book, *Co-Intelligence*, which was a New York Times bestseller and a best book of the year from The Economist and Financial Times.

He has focused on the ways in which AI and simulations can transform classroom education, leading to him being named MBA Professor of the Year in Poets and Quants. In addition to his research and teaching, Ethan is the Co-Director of the Generative AI Labs at Wharton, which build prototypes and conduct research to discover how AI can help humans thrive while mitigating risks. Prior to his time in academia, Ethan co-founded a startup company, and he advises numerous organizations.



## Rob Nail

CT, USA

✦ TECH FUTURIST & INNOVATOR

### Education:

- M.S.Eng, Manufacturing Systems, Stanford University
- B.S., MEchanical & Materials Sciences University of California, Davis

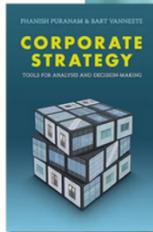
### Certifications:

- Soul Machines Certified Gold Conversationalist
- Stakeholder Centered Coaching Certificate, Marshall Goldsmith Stakeholder Centered Coaching

Rob Nail is an innovation consultant, leadership coach, investor, and wannabe surfer, but mostly, a proud husband and father. Previously, he Co-founded Velocity11 in 1999, building robotics and automation for drug discovery and cancer research - acquired by Agilent Technologies in 2007, where he attempted to be a catalyst for change at a big company.

He gave up in 2009 to go surfing. He came back to change the world as Associate Founder and the former CEO of Singularity University (SU). Today he facilitates programs on technology, innovation, and intrapreneurship at SRI's Nomura-SRI-Innovation Center (NSIC), and is a Venture Partner on AI Safety at Lionheart Ventures.

Rob's personal mission is to spread hope for an amazing future through inspiring stories, credible roadmaps, and collaborative networks.



# Phanish Puranam

## Singapore

- ✦ PROFESSOR
- ✦ SPEAKER
- ✦ AREA OF EXPERTISE: AI

### Education:

- PhD, Wharton School, UPenn

### University Positions:

- Academic Director of PhD Program at London Business School and INSEAD
- Visiting Professor at Northwestern University, UPenn, London Business School, Oxford University, Indian School of Business, and IIM-Ahmedabad



Phanish Puranam is a visionary in the realm of organization science, where he delves into the intricacies of maximizing organizational effectiveness. His quest? Unraveling the mysteries of how algorithms, from the realms of machine learning to blockchain and even the metaverse, shape our organizational landscapes. It's not just about understanding them as tools; it's about exploring how they become templates and even teammates in the dynamic dance of human-AI collaboration.

Phanish Puranam, Roland Berger Chair Professor of Strategy & Organization Design at INSEAD, is currently on sabbatical for the 2023-2024 academic year, serving as a Distinguished Visitor at Stanford University GSB and Visiting Professor at Imperial College Business School. Leading the charge at INSEAD's Organizations and Algorithms research program, fueled by the Desmairis Fund, Phanish is not just a mentor; he's a catalyst for future academic luminaries. Together with a global cohort of collaborators, they're pushing the boundaries of what's possible in understanding and harnessing the power of algorithms in organizational contexts.

He directs executive programs on "Transforming your Business through AI" and "AI for Business," and teaches MBA electives like "Org2.0: People Analytics" and "TechWork" at INSEAD. Additionally, he advises global corporations, public sector agencies, and serves as a Special Advisor on organization design and analytics for the UNHCR.



## Lynn Wu

PA, USA

✦ PROFESSOR

### Education:

- PhD, Management Science, MIT Sloan School of Management
- MS, Computer Science, MIT
- BS, Electrical Engineering and Computer Science, MIT
- BS, Finance, MIT Sloan School of Management

### Recognition:

- Early Career Awards from INFORMS and AIS
- Best paper honors from Information Systems Research, ICIS, CHITA, and Kauffman
- Wharton Dean's Teaching Award for excellence in education

Lynn Wu is an Associate Professor at the Wharton School of the University of Pennsylvania, where she teaches MBA, undergraduate, and doctoral courses on the transformative impact of emerging technologies on business and society. Her research focuses on the intersection of artificial intelligence, analytics, and innovation, exploring how these technologies reshape business strategy, productivity, and workforce dynamics.

Lynn's research has appeared in top journals across economics, management, and computer science. Her work is widely cited by major media outlets such as NPR, The Wall Street Journal, The New York Times, The Economist, and Forbes.

Prior to academia, she worked as a software engineer and research scientist. She has also collaborated with leading technology companies (e.g., IBM, Google, Meta, SAP), advised government organizations (e.g., the Department of Justice, the World Bank), and consulted for innovative startups.

With a unique blend of academic rigor and industry expertise, Lynn is passionate about uncovering insights at the frontier of technology and business, helping organizations navigate the challenges and opportunities of a rapidly evolving digital economy.

# SUBJECT MATTER EXPERTS

## Varied Specialties

Name	Background	Speaking Topics	Region
Iris Firstenberg	Distinguished Adjunct Professor at UCLA Business School.	Leadership for Extraordinary Outcomes, Team Dynamics	US, NY
Dion Flynn	Writer / actor on the "Tonight Show"	Executive Presence and Improvisation Tools for Leaders	US, NY
Prof. Gary Fraser	Dean and Professor, UCLA Business School	DEIB, leadership	US, CA
Derek Herrera	Bronze Star Medal recipient, Navy and Marine Corp Veteran	Resilience, Innovation, Unlocking Team Potential	US, CA
Adam Kingl	Author, Executive Director at London Business School, Former MD at Duke Corporate Education	Future of Work, Leadership and Innovation, Generational Paradigms, Creativity, High-Performing Teams	EMEA, UK
Thomas Kolster	Author, advisor to leading companies, keynote speaker in over 70 countries	The Future of Advertising, Purpose-Driven Marketing, Creative Approaches to Brand Impact	EMEA, UK
Bob Kulhan	Adjunct Professor at Duke and Columbia Business Schools	Improvisation for Business Leaders	US, NY



# SUBJECT MATTER EXPERTS

## Varied Specialties

Name	Background	Speaking Topics	Region
Alex Lazarus	Held leadership roles at Walt Disney, Virgin, Fox	Impact and Leadership, Adaptive Leadership, High-Performing Teams, Managing Change, Group Dynamics	EMEA, UK
Anat Lechner, PhD	Professor at NYU Stern School of Business	Strategy and Innovation	US, NY
Carol Lempert	Go-to speaker for companies such as Google, JP Morgan	Executive Presence and Communications	US, NJ
Robert Lippert, PhD	Renowned financial economist, author, and professor (e.g., Emory)	Executive Education: mini-MBA and Finance	US, SC
Steven MacGregor, PhD	Bestselling Author, McKinsey Senior Advisor, Professor	Sustainable High-Performance, The Future of Work	EMEA, Spain
Chris Males	Sought after speaker and coach for C-level executives, professional athletes	High Performance and Resilience	APAC, Australia



# SUBJECT MATTER EXPERTS

## Varied Specialties



Name	Background	Speaking Topics	Region
Jamil Qureshi	Performance Coach to the very top athletes in the world (golf, football - European and American)	Psychology of Peak Performance	EMEA, UK
Bernhard Reis	Former Chief Strategy Officer, Intel	Strategy workshops and coaching for leaders	NA, USA
Julius Thomas	2X NFL Pro Bowler, Cognitive Science, Performance Consultant and Coach	Elite Athlete Turned Performance Optimization Expert and Neuroscience Professor	US, FL
Dan Wang, PhD	Professor at Columbia Business School	Social Networks, Global Migration and Organizational innovation	NA, USA
Shonna Waters	Adjunct Professor, Georgetown. Former VP of Exec Advisory, BetterUp	Manager as Coach, Psychological Ergonomics, HR Analytics, Effective vs. Ineffective Leadership	US, VA
Jules White	Senior Advisor to the Chancellor on Generative AI & Professor of Computer Science, Vanderbilt University	Generative AI, Cybersecurity, Blockchain Technology	US, NY



## Prof. Iris Firstenberg

NY, USA

- ✦ WORKSHOP FACILITATOR
- ✦ SPEAKER
- ✦ CONSULTANT

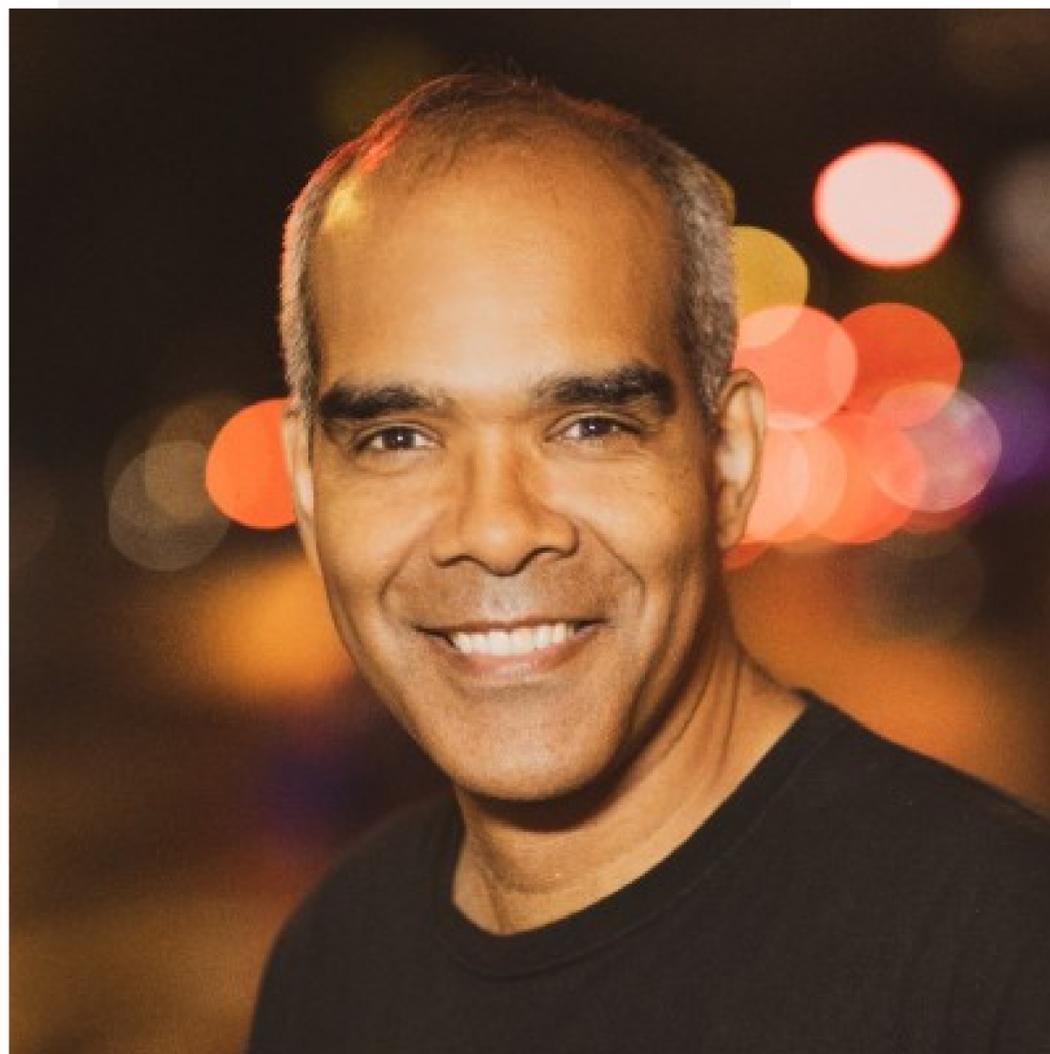
### Education:

- Ph.D, Cognitive Psychology, UCLA
- M.A., Cognitive Psychology, UCLA
- B.A., Linguistics and Psychology, UCLA

Iris specializes in strategies for creative problem solving and innovative thinking. An Adjunct Professor, she teaches in the UCLA Anderson MBA programs, UCLA Anderson Executive Education programs, and the UCLA Department of Psychology.

In addition, she conducts custom on-site courses and seminars for organizations on the topics of creativity and innovation. Her sessions provide exciting, thought-provoking, and practical strategies to help turn creative ideas into innovative business solutions. The framework she teaches is the result of research in multiple fields with examples from real-world situations that illustrate the concepts and dynamics at work. Learn to bring the future to the present in all aspects of your life, to lead yourself, your team, and your organization into the future.

Dr. Firstenberg is the recipient of the UCLA Faculty Distinguished Teaching Award.



## Dion Flynn

NY, USA

- ✦ IIMPROV WORKSHOP FACILITATOR
- ✦ KEYNOTE SPEAKER

### Education:

- BA, Theatre, University of Albany
- MA, Acting, NYU

### Videos:

- [Obama & Putin Phone Conversation on "Tonight Show"](#)
- [The Improvisor's Mindset](#)

### Praise:

- "One of the funniest guys I know."  
Jimmy Fallon
- "One of our favorite creative thinkers."  
Oprah Magazine

Dion Flynn is a gifted writer and actor known for his sharp wit and engaging characters. He excels at crafting memorable sketches and monologues, earning him a respected place in late-night television, including over 100 appearances on the Tonight Show. Prior to his entertainment career, Dion served in the military.

Dion Flynn is a renowned facilitator and trainer specializing in corporate workshops that leverage the principles of improvisational comedy. With a unique approach that blends humor and practical skills, Dion helps professionals enhance communication, creativity, and team-building within their organizations.

Dion's workshops are highly engaging and interactive, providing a safe and fun environment for participants to practice essential skills such as listening, public speaking, spontaneity, empathy, acceptance, awareness, presence, vulnerability, and confidence. His sessions are designed to foster personal and professional growth, enabling individuals to develop their unique voices and improve their presentation abilities.



## Dean/Prof. Gary Fraser CA, USA

- ✦ DEIB EXECUTIVE COACH
- ✦ WORKSHOP FACILITATOR
- ✦ SPEAKER

### Education:

- Ed.D., University of Pennsylvania
- MBA, NYU Stern (recipient of New York University's President's Service Award + President of the Association of Hispanic and Black Business Students)
- BA from Syracuse University (captain of the Intercollegiate Debate Team)

### Certifications:

- Multiple...

Dr. Fraser is the Dean of the MBA program at UCLA and former Associate Dean of Diversity and Inclusion at NYU Stern' School of Business where he is worked to enhance Inclusion, Diversity, Belonging, and Equity for all members of the NYU Stern community. He also teaches courses on the topic, including *Leading Inclusive Teams* in the Executive MBA program. Dr. Fraser frequently consults to several organizations including Credit Suisse, TIAA, Ace Hotel, Pearson Education, Harvard Business Publishing, the Graduate Management Admissions Council, the Consortium for Graduate Studies in Management, London Business School, University of California-Berkeley, and the Toigo Foundation.

Dr. Fraser is the founding board chair of Collegiate Charter High School of Los Angeles and has previously served on the board for the Los Angeles chapter of Minds Matter and Forte'- a national organization dedicated to the educational advancement of women into business careers.

Finally, Dr. Fraser is one of the founding members of HU-X (we're lucky to have him!).



## Derek Herrera

CA, USA

- ✦ KEYNOTE SPEAKER
- ✦ CONSULTANT

### Education:

- MBA, UCLA Anderson School of Management
- B.S., Systems Engineering, United States Naval Academy

### Honors and Awards:

- Bronze Star Medal with V (Combat Distinguishing Device), President of the USA
- John Wooden Global Leadership Award, UCLA School of Management
- Navy and Marine Corps Achievement Medal

After graduating from the US Naval Academy in 2006 he spent his first six years in the Marine Corps building and leading teams of Marines, Sailors and Soldiers in locations including Iraq, Haiti, the Middle East and Afghanistan. On June 14th, 2012, Derek was shot and paralyzed from the chest down while leading his Marine Special Operations Team on patrol in the Helmand River Valley, Afghanistan.

After his injury, Derek obtained his MBA and found his new life mission; to improve life through innovation. Since then he has founded multiple medical device companies including UroDev Medical (formerly Spinal Singularity), Habit Camera, and Bright Uro. He has also been fortunate to give back as a Board Member for the Marine Raider Foundation, MedTechVets, and the American Technion Society.

Derek's desire to connect with and enable high-performing teams and deep understanding of resilience resonates with audiences from all walks of life. Derek is available to help build, educate, and inspire teams to unlock their highest potential.

# Adam Kingl

## London, UK

- ✦ KEYNOTE SPEAKER
- ✦ AUTHOR

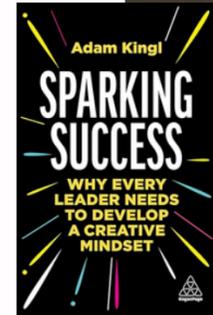
### Education:

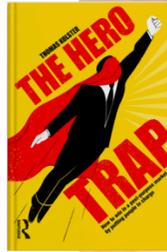
- MBA, London Business School
- MA, UCLA
- BA, Yale University



Adam Kingl has spent decades working in innovation, strategy, culture and leadership. He is an adjunct faculty member at the UCL School of Management, London Business School and Ashridge-Hult International Business School. Previously, Adam was the Regional Managing Director for Duke Corporate Education, leading the organisation's business in Europe, and advising clients on issues of adaptability, performance, creativity, and purpose. Adam was also the Executive Director of Thought Leadership and Learning Solutions at London Business School for a decade.

Adam's keynote presentations are an illuminating conversation that not only inspire strategic innovation but also unleash creativity and unlock issues within organisational culture. He speaks with warmth and compassion on paradigms of work and leadership, encouraging organisations to have different and better conversations, creating a simple and approachable path to transforming business success.





# Thomas Kolster

## London, UK

- ✦ KEYNOTE SPEAKER
- ✦ AUTHOR

### Education:

- BS, Copenhagen Business School

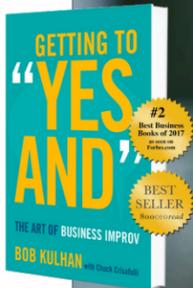
### Speaking Topics:

- Brand building
- Sustainability
- Marketing and activation
- Campaigns and advertising
- Organizational change and self-development
- Leadership
- Future of business
- Creativity and innovation



Thomas Kolster is a frontrunner and one of the most recognised thinkers globally where marketing, business and sustainability meet. Kolster is an international keynote speaker who has been featured in over 80 countries for companies like Meta, adidas, P&G, and IKEA, to conferences like TEDx, SWSW and Advertising Week. As the founder of the Goodvertising Agency, he advises Fortune 500 companies, start-ups, non-profits and governments on more creative strategic approaches to brand and business impact. His pen rarely rests as he writes for the likes of The Guardian, Ad Age, and Adweek.

Kolster continuously challenges the status-quo with his vocal, and often provocative, views on values, purpose, and leadership. In an over-crowded do-good market, people don't buy your values or your "why", but rather who you can help them become.



# Bob Kulhan

NY, USA

- ✦ BUSINESS IMPROVISATION
- ✦ WORKSHOP FACILITATOR

## Education:

- BS, Business Administration and Management

## Certifications:

- Presenter - Digital Summit 2021: Creating Engaging Learning Experiences for the Virtual World, ProEd
- Presenter - Conference on Management & Executive Development (CMED) 2020, ProEd

## Videos:

- [What's Improvisation](#)
- [Improv 101: The "Yes, and..." Principle](#)

Bob Kulhan is an Adjunct Professor at the Duke University Business School as well as Columbia University Business School.

For over 21 years he has performed and taught improvisation all over the world. He is sought after leader in developing experiential learning that transforms people's ability to look at problems from multiple perspectives, react, and adapt.

Bob's workshops unlock professionals' potential to "perform at the top of their intelligence" and have access to all that they know while at the same continuously adapting to changing environments.

His Workshop in Managerial Improvisation blends experiential exercises, adapted from traditional improv, with classroom lectures, case studies and discussion.



## Alex Lazarus

### London, UK

- ✦ KEYNOTE SPEAKER
- ✦ LEADERSHIP & TEAM COACH

#### Education:

- MSc in Coaching & Behavioural Change at Henley Business School
- BA in Humanities

#### Certifications:

- Diploma (Distinction) Coaching for Performance, The Coaching Academy
- CPD Neuroscience in Coaching, The British Psychological Society



Alex Lazarus is a global consultant supporting leaders and their organisations to operate optimally in the fast-changing marketplace. In business, Alex worked at Richard Branson’s Virgin HQ, Fox, and Walt Disney. As an award-winning Marketing Director, her role included leading teams, strategy, launching TV channels, awards, franchise management and partnerships.

Alex partners with leaders and executive teams worldwide to catalyse personal and organisational transformation. Her clients –often under intense pressure and immense responsibilities in dynamic environments–benefit from her supportive style, rigorous training, cutting-edge diagnostics and creative strategies to optimise performance. Through her bespoke approach, Alex empowers her clients to expand their behavioural and emotional range, enabling them to achieve goals and tackle leadership challenges with curiosity and grace.



## Anat Lechner

NY, USA

- ✦ WORKSHOP FACILITATOR
- ✦ SPEAKER

### Education:

- MBA, Strategic Management and Health Care Management – Wharton, UPenn
- PhD, Comparative Studies in Literature – University of Chicago
- MA, Comparative Studies in Literature – University of Chicago
- Diplome d'Etudes Approfondies, French and Comparative Literature – Universite de Poitiers
- BA, English and Classics – Haverford College

### Certifications:

- ACC, International Coach Federation
- Hudson Institute of Coaching Certified Executive Coach
- AI Certification for L&D, 360 Learning
- Chinese Politics, The Hong Kong University of Science and Technology

Anat Lechner is a Professor of Business Management at the Stern School of Business, New York University, a partner at Lechner Consulting LLC, and the Co-Founder of Huedata Inc., a Color Intelligence company.

Professor Lechner's research focuses on developing companies' disruptive innovation capabilities and outcomes. Her work encompasses various areas including leading strategic change and developing work environments supportive of creativity and innovation. A former Research Fellow at McKinsey & Co. Dr. Lechner is regularly featured on media outlets like NYT, WSJ, BBC, Fortune and others. Her client list includes global Fortune 100 firms in the Financial Services, Pharmaceuticals, Chemicals, Energy, Food, High Tech, design and Retail industries. She holds an MBA and a PhD in Organization Management from Rutgers University, NJ.



# Carol Lempert

NJ, USA

- ✦ EXECUTIVE PRESENCE COACH
- ✦ DESIGNER (PRESENCE AND COMMUNICATIONS)
- ✦ EXECUTIVE PRESENCE WORKSHOP FACILITATOR

## Education:

- MA, Communications, York University
- BA, Theater, Wayne State University

## Certifications:

- Life Coach - YWCA
- MBTI
- Certified Virtual Presenter - eSpeakers

Carol is a keynote speaker and learning designer with 20+ years of business experience. She believes that great communication, high performance, strong presence and inspiring leadership are intrinsically linked—and learnable.

Carol is a go-to speaker for many Fortune 100 companies. Clients include Danaher and its 27 Operating Companies, Google, Guardian Life, JP Morgan, Kearney, Definitive Healthcare, LumiraDx, FinDev Canada, Medidata, and University of Michigan Ross School of Business. She is currently a teaching fellow at Florida International University's Center for Leadership.

She is also a sought-after expert on presence and has been interviewed and quoted in: Forbes, The Financial Post, The National Post, The London Free Press, Readers Digest, Thrive Global, Authority Magazine and Speaker's Magazine.



## Robert Lippert

SC, USA

- ✦ WORKSHOP FACILITATOR
- ✦ SPEAKER

### Education:

- PhD, Finance and Economics, University of South Carolina Business School
- BSBA, Finance, Xavier University

Dr. Robert Lippert is a renowned financial economist with over two decades of global business experience. He co-authored "The New CFOs: How Finance Teams and Their Leaders Can Revolutionize Modern Business." Lippert has held faculty positions at Emory University, Georgia State University, Rutgers University, and the University of South Carolina, winning numerous teaching awards. He has consulted and taught in over 50 countries and is a sought-after keynote speaker.

Lippert excels in executive education, helping organizations develop strategies for financial success. He creates and delivers courses for prestigious institutions like DukeCE, Emory, UCLA, UNC-Chapel Hill, and the Wharton School of Business. His clients span various industries, including automotive, energy, healthcare, financial services, and technology.

Additionally, Lippert has held executive roles, including CFO and Vice President of Strategic Planning for a publicly traded company. He earned a BSBA from Xavier University and a Ph.D. in Finance from the University of South Carolina.



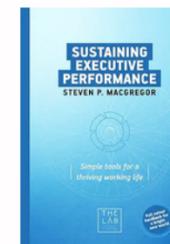
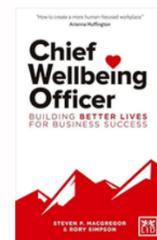
## Steven MacGregor

### Barcelona, Spain

- ✦ KEYNOTE SPEAKER
- ✦ AUTHOR
- ✦ PROFESSOR

#### Education:

- PhD, Engineering Design Management  
University of Strathclyde
- Visiting PhD Scholar, Stanford, Carnegie Mellon, and the University of Calgary
- Masters of Engineering, University of Strathclyde



Dr. Steven MacGregor is an international speaker, bestselling author, wellbeing pioneer and leadership development expert. He has over 20 years of experience in wellbeing and leadership, is a Senior Advisor for McKinsey & Company and has worked with dozens of the world's leading organizations.

He delivers inspiring keynotes and workshops around the globe, sharing his vision of life/work with health, wellbeing, and sustainable performance at the core. He draws on a PhD in design thinking, an Honorary Professorship at the Glasgow School of Art and several hundred sessions teaching at the world's best business schools.





## Chris Males

### Australia

- ✦ WORKSHOP FACILITATOR
- ✦ EXECUTIVE COACH

#### Education:

- B.S., Exercise Physiology, Sports Science, and Coaching

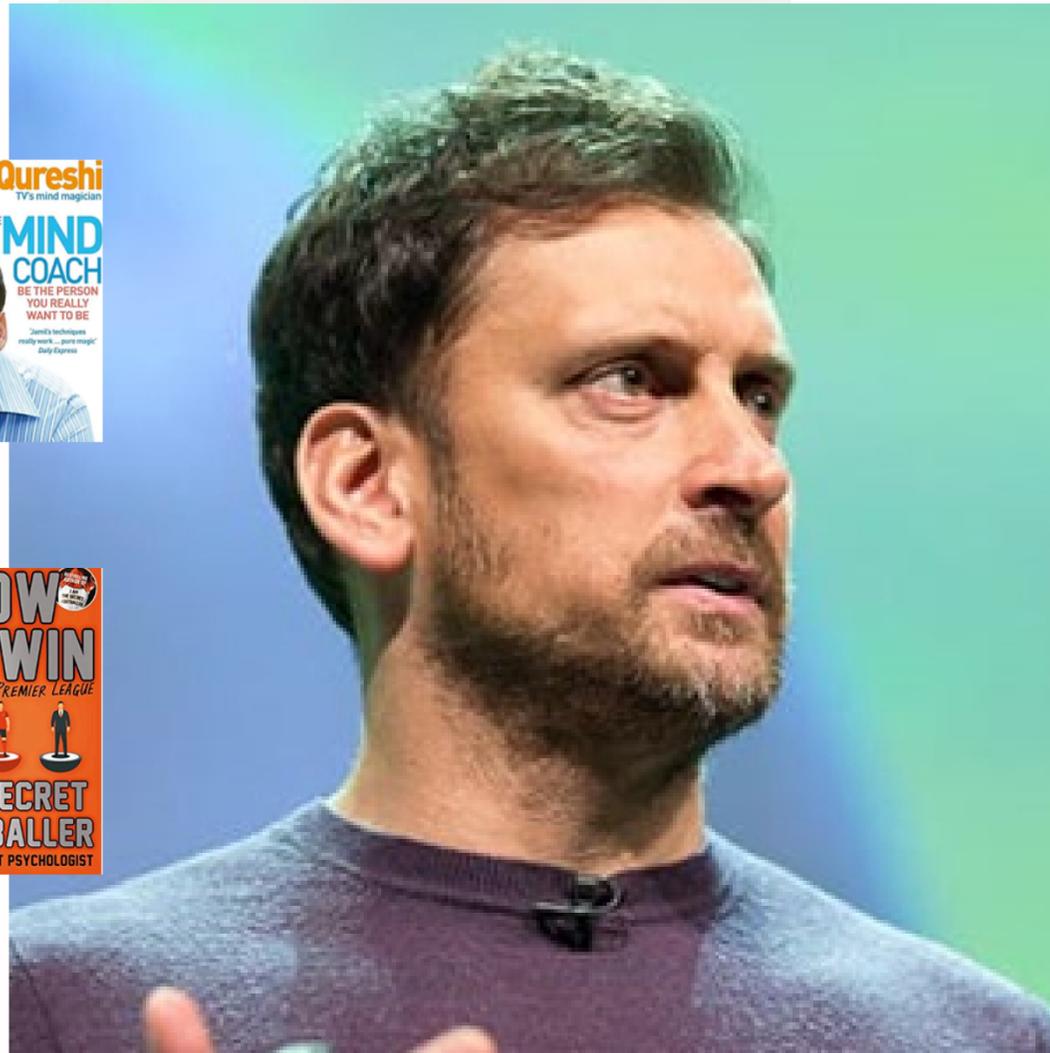
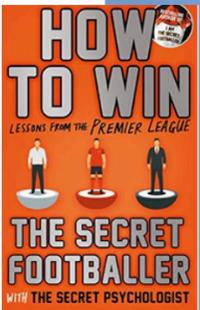
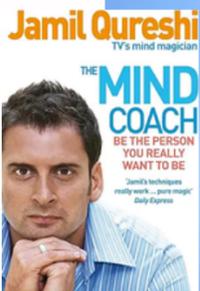
#### Certifications:

- 100 Coaches Program, Marshall Goldsmith

Chris is the former Global Director of Performance Coaching at TIGNUM, the world leading Sustainable High Human Performance development firm. In this role Chris lead a cadre of highly specialized executive high human performance coaches in delivering the TIGNUM methodology and content to executive groups and individual executives desiring to increase their impact on themselves and on others their teams and their families.

As a sought after speaker and high performance coach Chris has helped numerous C-level executives, business professionals, professional athletes, and military personnel maximize their performance and impact. Originally from Australia, Chris's unique background as a former athlete, coach and trainer, combined with his passion for executive high performance, allows him to help his clients develop their best Performance Mindset so they can have high mental agility, improved performance resilience, and succeed in their most critical moments of influence and impact. In 2020, Chris was inducted into the Marshall Goldsmith top 100 Coaches program, an organization of some the best executive coaches, leaders and business thinkers from around the world.

Chris has coached the President of Novartis, SVP of Customer Development at Unilever and many more.



## Jamil Qureshi

### London, UK

- ✦ TALENT DEVELOPMENT
- ✦ ORGANIZATIONAL DEVELOPMENT
- ✦ FACILITATOR

#### Speaking Topics:

- Turning Ambition into Achievement
- Blame Looks Backwards, Responsibility Looks Forwards
- Engagement – Rhetoric or Reality
- The Disruptive Leader
- Sustainable Relationships



Jamil Qureshi is a world-renowned speaker and performance coach, specializing in leadership, cultural change, and team performance. He has designed and delivered leadership programmes at board level for global corporations such as Coca Cola, Hewlett Packard, Emirates Airlines, Cisco, and GSK, and played a key role in Lloyds Banking Group's award-winning 'Journey to World Class' programme<sup>13</sup>. His expertise extends beyond the corporate world, as he is one of the few external psychologists ever allowed to study astronauts on the 2008 NASA Space Programme<sup>23</sup>.

Qureshi's versatility and impact as a speaker are evident in his diverse engagements. He has addressed audiences that included two former US presidents at the K Club in Ireland and was chosen as the supporting speaker for Tony Robbins in Dublin<sup>7</sup>. His ability to connect with various audiences is further demonstrated by his appearances at NASDAQ in New York, where he shared the stage with General Peter Pace, the highest-ranking military officer in the US armed forces, followed by a stand-up performance for a celebrity audience at the Groucho Club the next day<sup>37</sup>. Qureshi's global reach is exemplified by his feat of speaking in six countries within just two days, showcasing his dedication to sharing his insights on performance psychology and leadership across the world



## Bernhard Ries

CA, USA

- ✦ WORKSHOP FACILITATOR
- ✦ EXECUTIVE COACH

### Education:

- MS – Computer Science, Technical University, Munich Germany

### Certifications:

- PCC, International Coach Federation
- Hudson Certified Coach
- Birkman Assessment
- Team Diagnostics

Bernhard has over 30 years of experience in the Tech Sector in roles spanning across software engineering, product & brand marketing, business development and corporate strategy. Most recently he was the Head of Intel's Corporate Strategy Office reporting directly to the CEO and leading a team of senior strategists to drive the transformation of the company.

Bernhard's expertise lies at the intersection of strategy, communications, and organizational development. Through leadership roles in diverse areas of technology and by operating on three continents (Europe, North America & South America) he has mastered different facets of business and how to best work in diverse cultural settings. His strong belief is that business performance always comes back to leading with a sound strategy while paying equal attention to developing people and activating the power of good leadership to sustain execution.

Bernhard was the recipient of the 2022 ICF PRISM award for coaching excellence.



## Julius Thomas

FL, USA

- ✦ SPEAKER
- ✦ PERFORMANCE COACH

### Education:

- Psy. D, Clinical Health Psychology, Nova Southeastern University
- MA, Clinical Healthy Psychology, Nova Southeastern University
- BA, Human Resource Management, Portland State University



Julius Thomas knows what it takes to excel. As a former All-Pro NFL tight end, Julius faced the intense physical and mental demands of professional sports, achieving success with the Denver Broncos, Jacksonville Jaguars, and Miami Dolphins.

After retiring from football, Julius channeled his passion for peak performance into academia. Now a neuroscience professor and doctoral candidate in clinical health psychology at Nova Southeastern University, he combines cutting-edge research with his athletic experience. As Vice President of the Society for NeuroSports and a member of the Football Players Health Study at Harvard, he offers a unique perspective on optimal performance.

Julius' achievements include 2x Pro Bowl selection (2013, 2014), led the NFL in receiving touchdowns (2013), key contributor to the Broncos' record-breaking 2013 offense

Julius excels in merging complex neuroscience with actionable insights, connecting with diverse audiences through keynotes, workshops, coaching, and research. He empowers individuals to unlock their full potential and achieve sustained success.



## Dan Wang, PhD NY, USA

- ✦ WORKSHOP FACILITATOR
- ✦ SPEAKER

### **Education:**

- PhD, Sociology, Stanford University
- BA, Sociology, Columbia University

Dan Wang is an Associate Professor at Columbia Business School and Co-Director of the Tamer Center for Social Enterprise. He specializes in social networks, global migration, and organizational innovation. Wang teaches MBA courses on Strategy Formulation and Technology Strategy, and leads Executive Education modules. He earned his BA from Columbia University and PhD from Stanford University.

Wang has received several teaching awards, including the 2020 Dean's Award and the 2018 Singhvi Prize at Columbia Business School. He was also named to Poets and Quants' 2018 list of "Best 40 Business School Professors under 40." In 2021, he received the Robert W. Lear Service Award, given by the graduating class for his commitment to the MBA student body.

His research, published in numerous prestigious journals, focuses on global migration, social activism, and entrepreneurship. He's a recognized expert on "reverse brain drain" and its impact on innovation and entrepreneurship. His work has been cited in The New York Times, Bloomberg, The Wall Street Journal, and NPR and has been recognized with multiple awards from the Academy of Management. He has also been awarded both the Dissertation (2012) and Junior Faculty Fellowship (2017) from the Kauffman Foundation. He has also contributed to practitioner-oriented publications such as Strategy+Business, and written Op-Eds for CNN.



## Shonna Waters

### VA, USA

- \* ORGANIZATIONAL PSYCHOLOGIST
- \* SPEAKER
- \* FACILITATOR
- \* COACH

#### **Education:**

- PhD, Industrial/Organizational Psychology, University of Minnesota
- BA, Psychology, University of Maryland

#### **Certifications:**

- Leadership and Coaching, Georgetown University Institute for Transformational Leadership
- SHRM-SCP
- ACC, International Coaching Federation

Shonna is an experienced technology executive with over two decades of expertise in human capital transformation. Her career includes roles as a university professor, coach, operational leader, researcher, and scientist. Shonna's mission is to make scientific knowledge about individual, team, and organizational performance accessible at scale, driven by the belief that untapped potential fuels growth.

Shonna is the former Vice President of Executive Advisory at BetterUp, where she helps C-level customers leverage science and technology to achieve critical business outcomes. Previously, she led the development of BetterUp's technology alliances and strategic partnerships. Shonna has managed large, complex projects and led diverse global teams.

Throughout her career, Shonna has designed and implemented human capital systems, from pre-hire assessments to performance management and rewards programs for mid to large-sized organizations. Her approach blends science and practice to drive better outcomes for people and businesses. Building and developing people, teams, and businesses is her passion and source of endless reward.



## Jules White

NY, USA

- \* PROFESSOR
- \* AI SPEAKER & ADVISOR

### Education:

- PhD, Vanderbilt University
- BA, Brown University

Dr. Jules White is a prominent academic and innovator at Vanderbilt University, serving as Senior Advisor to the Chancellor, Director of the Initiative on the Future of Learning & Generative AI, Professor of Computer Science, and Associate Dean of Strategic Learning Programs. A recipient of the National Science Foundation CAREER Award, he has published over 170 research papers and received multiple Best Paper Awards. His research areas include large language models (like ChatGPT), cyber-security, and mobile/cloud computing, with applications in healthcare and manufacturing. He directs the Mobile Application computing, optimization, and security Methods (MAGNUM) Group at Vanderbilt.

Dr. White has also made significant contributions to education by creating one of the first online courses for Prompt Engineering on Coursera, which has attracted over 470,000 enrollments. He led Vanderbilt's online MS in Computer Science program to the #1 ranking by Fortune. As an entrepreneur, he holds multiple patents and has raised over \$12 million for several venture-backed startups. His research has earned industry accolades, including an Innovation Award at CES 2013 and recognition at SXSW Interactive. Dr. White's work has been featured in major media outlets like The Wall Street Journal, CNN, and The Guardian, solidifying his impact in computer science and artificial intelligence.



**THANK  
YOU!!**

