



# Sterling Insights.

Competent

Respected

Innovative

Informed

Equipped



I am continually impressed by the consistency of your message on the potential of people to grow within themselves and collectively. This dedication of purpose that you and your team exude is what I believe allowed us to be so successful.

Greg Barr, Vice President,  
Solar Turbines



Your deep commitment to a better world compels you to do the right things. I believe you are an excellent thinker and an immensely skilled facilitator. You are also very clear and understandable for those who will listen and participate.

Ray Patchett, City Manager,  
City of Carlsbad



### **Sterling Insights**

**For** organizations, companies and communities **who** struggle to anticipate and adapt to the pace and scope of global change, **we deliver** professional services that create breakthroughs in robustness, resilience, responsibility, and renewal.

**Our services** focus you on integrating economic, social, and environmental considerations for your sustainable success.

## **Competent**

The Sterlings bring over 35 years combined strategic planning and organization development experience to their domestic and international work.

Corporate, government, and community clients have taken advantage of the Sterlings' spectrum of strategic improvement tools, methods and wisdom.



I have no hesitation in recommending Sterling Insights to organizations to design, facilitate, and capture high impact interactive events intended to reach transformational outcomes and achieve new levels of organizational learning.

Randy Russell, Vice President,  
Balanced Scorecard Collaborative



By showing us how to create a comprehensive vision and providing a systemic framework for thinking about sustainability, your team was most successful in motivating the Alpine stakeholders to develop their own vision for the community.

Paul Rohal,  
Alpine Planning Group





## Informed

In 1996 Joe began helping Ernst & Young, LLP learn and implement the collaboration methods used in what became the worldwide network of Accelerated Solutions Environments. He worked extensively with E&Y's think tank, the Center for Business Innovation, in Cambridge, MA, and was a contributor for three years in the IBM Institute for Business Value. Joe holds a BA degree in Humanistic Psychology, and his recent studies include systems modeling at MIT, and Master Class training on strategic planning and management from the Balanced Scorecard Collaborative.

Rita holds a marketing MBA, a Certificate in Change Management from National Training Labs, and received advanced training in change management from Implementation Management Associates. Her last internal position was Global Leader for Change Management at Solar Turbines. Her current study includes applications of biomimicry to business management.



## Innovative

One of the Sterling's recent innovations is the "Region Game" played by ~60 participants on a 1000 square foot map of the San Diego-Baja Region. The game simulates complex regional dynamics so stakeholders and policy makers can:

- ❖ Learn about regional realities and trends
- ❖ Practice working out solutions
- ❖ Find ways to win as a region
- ❖ Have fun while learning together

In 2006, Joe and Rita published a comprehensive pandemic planning guide for families and neighborhoods. Joe recently co-facilitated the first World Resource Simulation Center event.



## Respected

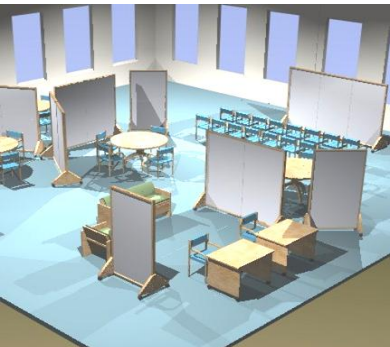
For leadership and humanitarian service the Sterlings have been recognized by:

- ❖ US Congress, CA State Senate and CA State Assembly
- ❖ County of San Diego
- ❖ Alpine Chamber of Commerce
- ❖ KGTV Channel 10 Leadership Award

For design and implementation of Alpine's Revitalization process they received the

- ❖ East County Decade of Service Award

The San Diego Foundation's "Regional Vision Initiative" was initially designed by Joe Sterling and Peter MacCracken. The "Free Agent Ecosystem" founded by the Sterlings in the early 2000's is a network of professional colleagues operating by a shared set of ethical guidelines and processes.



## Equipped

Sterling Insights utilizes a fully equipped portable design facility that can be set up for short-term or long-term use to facilitate client outcomes. These tools transform any conference space into a collaboration and creativity zone. Groups (10-60+) can experience accelerated results and increased productivity using these tools.

For two years this equipment was installed at the City of Carlsbad to improve their strategic planning and "Connecting Community Place & Spirit" work. Other organizations in Southern California that have used this gear include: Solar Turbines, IDEC, Toyota, the town of Alpine, and the US Medical Licensing Examination board.



Your story gave me greater insight into your humanity. Your principles of leadership have inspired me in the challenges I face today, and are equally applicable to all areas at times of crisis.

Bill Boyajian, President,  
Gemological Institute of America, Carlsbad



Your exciting, innovative approach to capturing information played a crucial role in the success of the conference. 'Illuminating', 'visionary', and 'vibrant' were just a few of the words participants used to describe your work.

Sallie Craig Huber, Director,  
Management Sciences for Health



# What We Do

Sterling Insights serves clients that are working on complex company or community issues and opportunities, but who struggle with the collaboration and creativity needed to succeed. We bring experience, best practices, and proven tools to our clients' unique requirements in seven key service areas:

## Strategic Planning & Facilitation

Sterling Insights has been helping leaders, business unit executives, communities, and non-profits develop and revise their visions and strategies for 20 years. Our facilitation approach dramatically accelerates results, regardless of whether the group has 10, 100, or over 1000 members. We facilitate clients through a three stage process: strategic analysis; strategy ideation and decision; and implementation planning. Our clients develop actionable visions, practical strategies, organizational objectives and alignment, and plans that are executable within the organization's constraints.

## Change Management

Charles Darwin said about life that there are three choices: adapt, migrate or die. The more effectively you adapt as changes come, the more likely you are to thrive. Our change management approaches help you shepherd vision and strategy through implementation. By guiding, coaching, training, and facilitating groups before and after strategic decisions are made, an organization will implement faster and with less resistance. Change Management is critical during reorganizations, mergers, acquisitions, culture changes, implementation of new technologies, and when responding to crises.

## Organization Development

Organizations, like natural organisms, must function in relationship to their "ecological" system, i.e. their internal and external environment. We apply various tools to map the "system" within and surrounding the organization. This is one tool to help clients develop strategic insight, formulate change strategy, and accelerate results. We design change processes to send positive effects rippling throughout an organization. "Virtualization" of the work place and work force has created new organizational opportunities and challenges for which we have cutting edge tools and methods.



## Graphic Facilitation

We create pictures worth thousands of words. Our suite of graphic services translates complex concepts, plans, and messages into colorful visual metaphors, models, and illustrations that improve understanding, communication, and action. Our remote graphic services bring more life to your conferences, phone calls, meetings, and webinars, in real-time, all by Internet.

## Story & Influence

The power of communication resides in the stories we tell. They are the single most powerful form of communication between people. We work with senior executives and others who want to get to the next level of leadership and influence, be more effective communicators, and increase responsiveness, change and innovation in their audiences. We help leaders connect one-on-one when speaking in front of hundreds using our proven approach. The result, our clients empower and inspire audiences through their voice and their stories.

## Coaching

The leaders, established and emerging, that we coach gain confidence in an environment of trust and support. We collaborate with executives who want to improve communication skills, charisma, and their leadership messages. They learn to establish presence, stay on point, and craft key communications for peers, employees, customers, shareholders, and the public.

## Training

We provide learning experiences that are tailored to your unique development requirements. First, we assess the purpose and specifics of each skill development request to make sure that training is the right solution. Then we work collaboratively with you to tailor our training to your needs and build in training effectiveness measures. Your employees acquire the critical knowledge and skills to achieve your short and long-term goals.



We were able to develop breakthrough strategies. Without your expert help, we would have never accomplished our goals.

Michelle Avary, Business & Strategy Manager,  
Toyota Motor Sales USA





## Who We Serve

**Sterling Insights** has been serving corporate and community clients since 1991. They have worked with organizations in the US, Europe, Latin America and Asia. Being headquartered in San Diego County, Sterling Insights has deep knowledge of the region's social, economic, and environmental history, trends, and dynamics.

### Corporate

- American Express
- Balanced Scorecard Collaborative/Palladium Group
- Cap-Gemini Ernst & Young
- Covad Communications
- Credit Suisse First Boston
- ENCAD
- Farmers Insurance Group/Zurich Financial Services
- Fast Company Magazine
- IDEC Pharmaceuticals
- IBM Institute for Business Value
- Management Analysis Corp.
- Molnlycke Healthcare
- Nissan North America
- Peregrine Systems
- Profitline
- Quantum
- Radiant Systems
- Safeskin
- Solar Turbines, Inc.
- Stellcom
- Strategic News Service, Future in Review
- Toyota Motor Corp. (Japan)
- Toyota Motor Sales, USA
- Visible-Think/Fortune Magazine
- Vodafone, Netherlands
- Western Federal Corporate Credit Union
- Wieden+Kennedy

### Public & Non-Profit

- Alpine Revitalization
- City of Carlsbad
- City of El Cajon
- City of San Diego
- Global Energy Network Institute
- Lions Club, Downtown San Diego
- Maga Design/U.S. Navy SPAWAR
- Management Sciences for Health
- MIT Enterprise Forum, San Diego
- New School of Architecture & Design
- Pepperdine University
- Stanford University
- The San Diego Community Foundation
- San Diego Grantmakers
- San Diego County Regional Airport Authority
- San Diego/Tijuana Border Initiative - United Way
- San Diego County Water Authority
- Society for Human Resource Management
- US Green Building Council
- United States, Joint Chiefs of Staff
- Wharton Business School, University of Pennsylvania



I think your method could be fruitfully used as an introduction to a strategic vision process, handling conflict or building a community. You made an impression on our community.

Who knows what ripple effects will result!

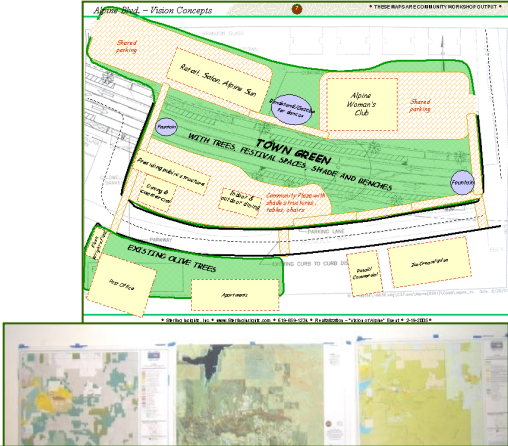
Ann Feyerherm, Ph.D., Director,  
Pepperdine University

# Case: City of Carlsbad, CA



- Vision and scenario development, strategic planning, balanced scorecard, City Council goal setting
- Community building, sustainability planning
- Designed and facilitated multiple events - 10 to 150 participants
- Innovative City approaches to development industry, auto dealers

# Case: Revitalization Alpine, CA



- **Community vision development, mobilizing participation, supporting implementation, facilitating balance of competing priorities**
- **Alpine Revitalization community support web site [www.4RCommunity.com](http://www.4RCommunity.com)**

# Case: Vodafone, Netherlands



- Designing the future of an 800 person business unit in the Netherlands
- 2-day vision and strategy session with 16 executives
- 3-day implementation and team building event for 80 division managers

# Case: Toyota Financial Services



- **Strategic planning process design and facilitation for a Toyota business unit**
- **32 Participants, 2 Days, Torrance, CA**
- **Work environment and tools, visual and text synthesis documentation**

# Case: World Resource Simulation Center Oceanside, CA



- **June 2009 - Alpha-test of prototype facility for simulating global conditions, trends, and sustainability solutions with global and regional impact – conducted at Quantum Learning Network**
- **Provided large-group event design and facilitation, 1000 sq.ft. floor map of San Diego County, graphic facilitation**  
[www.WRSC.org](http://www.WRSC.org)

# Case: Management Sciences for Health



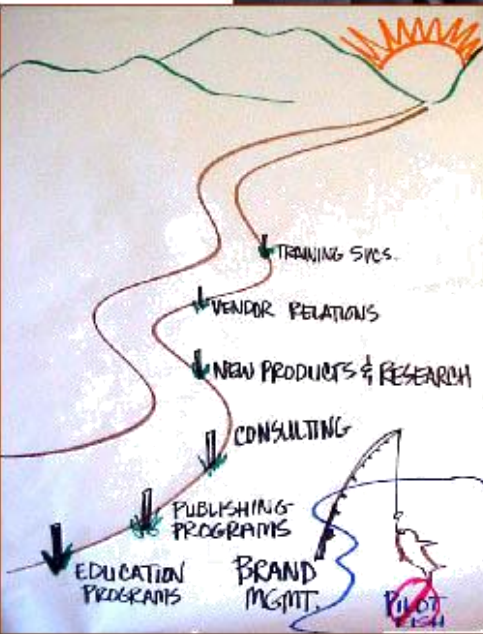
- **Visual synthesis and documentation, conference design, room layout, presenter coaching, graphic facilitation**
- **150 Participants, 2 Days, Washington, D.C.**



- **Facilitation of 3-Year Strategic Plan process**
- **Utilized video-conferencing tools to facilitate breakout groups in multiple East Coast locations simultaneously**



# Case: Palladium - Balanced Scorecard Collaborative



- Facilitated the co-authors of the Balanced Scorecard and their leadership team to implement a scorecard for their own consulting firm
- Strategic illustration and strategy mapping



## Meet The Team

Sterling Insights core team of top flight contributors:

- Joe Sterling
- Rita Sterling, MBA
- Eileen McNichol Clift
- Karen Dietz, PhD
- Jeff VanderWielen, PhD
- Clint Burdett, MS, MA, CMC
- Yolaine M. Stout



### Joe Sterling

**Contributor** Joe Sterling has been designing and facilitating visioning and strategic planning engagements for corporate, non-profit and municipal clients since 1991. Joe helped Ernst & Young learn the methods used in what became a worldwide network of Accelerated Solutions Environments (ASE). He worked extensively with the E&Y Center for Business Innovation, and was a contributor in the IBM Institute for Business Value.

**Innovator** A current innovation project is the “San Diego Region Game” played by up to 100 participants on a 1000 square foot floor map of San Diego County. The game simulates complex regional dynamics so stakeholders and policy makers can create visions and sustainable solutions to long-standing regional problems. Over the last several years Joe has been supporting The San Diego Foundation in formulating a process for engaging all regional stakeholder to create and update a comprehensive 50+ year vision for the County. This effort applies lessons learned from facilitating visioning work in Carlsbad, Alpine, and City of San Diego. In 2006, Joe and his wife, Rita, published a comprehensive pandemic planning workbook for families and neighborhoods.

**Synthesizer** Joe has a unique ability to visually synthesize, in real-time, complex concepts, strategies, and dynamic systems into “strategic illustrations”. Dozens of major corporations and government agencies have engaged Joe to help them understand their own issues, visions, and plans. Recent projects include graphic synthesis of the San Diego County Water Authority’s 2009 Water Conservation Summit. He has also crafted interpretations of the latest work by Drs. Norton and Kaplan, authors of The Balanced Scorecard and Execution Premium; and a visual timeline of Google’s global sales and marketing organizations. He was the official scribe for the Future in Review conference at the Del Coronado Hotel in 2007 and 2009.

**Collaborator** Joe is one of the architects of the Free Agent Ecosystem™ toolbox that provides independent consultants with ethical and business frameworks to enhance their collaborations. Over 80 San Diego consultants, mostly in organization development and training, have been using these approaches since 2001. They talk about it as an operating system for ethical deal making and collaborative service delivery.



We received extremely complimentary remarks regarding the San Ysidro Community’s reaction to the [Livable Neighborhoods] workshop. It is because of the combined efforts of all those who participated in the event, including your direct contribution, that the event was a success.

Patricia Hightman, Deputy Executive Director  
City of San Diego Redevelopment Agency



## Rita Sterling, MBA

**Organizational Development** Rita has been an Organization Development consultant and corporate trainer since 1985. Corporate, government and non-profit organizations including Great American Bank, Rohr Industries (BF Goodrich), IDEC Pharmaceuticals, Kimberly Clark, City of Carlsbad, Fullerton College, American Express, and Toyota have all benefited from her insight and skill. Prior to becoming a principal at Sterling Insights, Rita's last internal position was Global Leader for Change Management at Solar Turbines.

**Up to Date** Rita stays current in several disciplines including the emerging fields in sustainability. She routinely digests new works by leading authors and synthesizes them down to their essence to help clients move farther faster. She trains colleagues on the breakthrough methods she discovers. While her formal education includes an MBA from Western Michigan University, she has kept her skills sharp with certifications in Change Management (National Training Labs and a second from Implementation Management Associates). She was trained as a Baldrige Examiner by California Council for Quality & Service. She knows what it takes to get things done in organizations.

**Humanitarian Service** With her Joe Sterling she was recognized for leadership and humanitarian service after the 2003 San Diego wildfires, by: US Congress, CA State Senate and Assembly, County of San Diego, Alpine Chamber of Commerce, and is a recipient of the KGTV Channel 10 Leadership Award. In 2008 she received the Decade of Service Award for community service in Alpine, CA. She has held board positions in regional non-profits including the Organization Development Network and the American Society of Training & Development.



## Eileen McNichol Clift

**Public Relations & Project Management** – Eileen's ability to build rapport, engage and learn from a wide array of personalities, from the sheriff's deputy on the beat to executive leaders, makes her a highly effective sleuth of important information and connections between people. Her experience in case management in legal, real estate, and medical settings, give her the breadth of skills needed to help keep the small things on track while working on big issues.

**Research** – Eileen is co-creator, with the Sterlings, of the San Diego-Tijuana Region Game. This interactive simulation draws upon data from all over the region covering issues, historical trends, and future projections. Eileen's research and appreciation for a wide array of seemingly disparate bits of regional information were instrumental in developing this powerful experience that can inform so many kinds of decisions and actions.

**Regional Experience** – Eileen's knowledge of the region comes in no small measure from decades of work around the greater San Diego area. She has worked in various roles with professionals around San Diego County to sustain customer satisfaction, diplomatically resolve issues between organizations, and improve business processes. Eileen earned a degree in Speech Pathology from San Diego State University.



I want to thank you for all your contributions to my life personally and professionally. The Free Agent Ecosystem concepts have been wonderful in guiding my work. Storytelling has had a major impact... Again, thanks for all you do and continue to do for the extended community. Ozzie Gontang, Group Chair, Vistage International



## Jeff VanderWielen, Ph.D.

**Organizational Psychologist** Jeff has over 15 years of experience in individual, team and organizational development practice. He is a specialist in facilitating large-scale change, improving group effectiveness, and advising leadership. The focus of his work is assisting leaders to achieve business results by increasing the vitality and performance of individuals and teams.

**Helping Business and Community Stakeholders** Jeff guides leaders to develop clear vision and viable strategies for sustainability. His recent work includes facilitating a future vision and alliance among several public agencies for sustainable water supplies in the San Diego region. He has also conducted a benchmarking review of water conservation and education best practices. Jeff helps leaders make a deeper personal commitment to their role as change agents to bring forth a sustainable future where they work and live.

**Track Record** Jeff worked as an internal consultant in the City of San Diego's Organization Effectiveness Program in the mid-1990s, then joined Ernst & Young to manage large-scale change and organization development efforts. He has facilitated the development of a five-year vision and strategy for a large North American power company, facilitated organization design efforts for the formation of a national healthcare system, developed an organizational blueprint and resource plan for the marketing division of a leading software company.

**Learning** Jeff is an adjunct professor of Organization Development at National University. He earned his Ph.D. in Industrial/Organizational Psychology from the California School of Professional Psychology.



## Karen Dietz, Ph.D.

**Folklorist, trainer, and storyteller** Karen has been helping improve the performance of individuals and organizations for over 20 years. She propels client's leadership, culture, communications to higher effectiveness. Walt Disney, Chase Manhattan Bank, and City of Santa Monica have engaged her to build story repertoires that connect employees, customers, and stakeholders. With Karen, leaders have been able to identify their organization's core story in order to better articulate brand and positioning strategies.

**Public Sector Projects** Karen worked with the New York and New Jersey State Councils on the Arts where she helped crystallize ethnic and community identity; identified and promoted the local oral culture, arts, craft and transmission of knowledge to unite and sustain community identity. In California she facilitated the City of Bakersfield's Year 2000 Vision. In that project she worked with a variety of ethnic communities to help them design their own future, unite diverse community leadership, and solidify community identity.

**Recent Roles** Karen's last position was CEO of a high profile national association. In that role, she increased the efficiency of internal processes and turned the organization onto a path of profit and growth after several years of decline. In that role she reorganized, automated association operations and member services, reformatted the national conference, and updated many programs. Karen co-created the Free Agent Ecosystem™ with the Sterlings in 2000. The FAE encourages collaboration among San Diego's management consultant community.

**Education** Karen attended the University of Pennsylvania, receiving her MA and Ph.D. in Folklore. In addition, she has received some of the best training available from many traditional and renowned storytellers on the characteristics of compelling stories.



Expertly facilitated and beautifully captured! The time and attention you gave to us were clearly worth every penny and more. I will indeed be recommending your services to others, and I am sure members of our board will as well.

Nancy Jamison, Executive Director, San Diego Grantmakers





## Clint Burdett, MS, MA, CMC

**Strategy Formulation Facilitator** Clint has worked with senior management teams for over 20 years to formulate and implement strategy. Both as the decision maker responsible for implementation and as a facilitator, he leads teams through their deliberations, adding his wealth of experience from many industries.

**Excellent Outcomes** Clint worked with Hester Industries to merge with ConAgra, with 7 Eleven to develop its Balanced Score Card, with Webex to refine its sales strategy and segmentation, with Medicine Shoppe International to design independent pharmacy store layout and resolve its business design, and with many small to medium size firms to develop their long term growth strategies. Several of Clint's coaching clients have been promoted to Senior Vice President.

**Community Builder** Clint continues to hone his facilitation and leadership skills by volunteering his time as the Board Chair or CFO of charity organizations and in the Institute of Management Consultants USA as the Certification Chair. Clint was recognized for his leadership in crisis during the 2008 Witch Fire by the County of San Diego and awarded the IMC USA Community Service Award. Clint knows how to help professionals excel under pressure.

**Global Perspective** Clint attended Vanderbilt University earning an MS in Engineering Management and went on to the US Naval War College earning a MA in Strategic Studies. He was the Chief Negotiator for Reorganization of NATO's Military Command Structure. He has taught hundreds of senior executives the strategic planning process for the AMA. Clint has served as a Trustee or Director on several Boards.



## Yolaine M. Stout

**Civic Service and Conservation** – Yolaine is a vigorous contributor to her local community as a volunteer for nonprofits and an active member of numerous local government committees. Her efforts led to the creation of a 320 acre nature preserve in Alpine, called Wright's Field, and the 2000 acre Crestridge Ecological Reserve in Crest.

**Non-Profit Expertise** – Yolaine has over 20 years' experience in nonprofit development, management, fundraising, and strategic planning. In 2008, she received her certificate in fundraising management from the Center on Philanthropy at Indiana University. She has directed and or founded numerous nonprofits including the Back Country Land Trust, the Alpine Community Foundation.

**Lessons from Nature** – Yolaine and Rita Sterling are developing tools and solutions for organizations based on how nature solves complex problems and creates sustainable living systems. Topics include: competition, resilience, zero waste, cooperation, adaptation, planning, innovation, and more.

**Language Professional** – An honors graduate from UC Berkeley with 25 years teaching experience, Yolaine's writing is clear and persuasive. Her grant proposals have raised over \$1 million for open space acquisition.



Thanks again for the great facilitation of the Development Review Process working group. It was really amazing that we finished in 4 sessions and everyone stayed so focused and upbeat. Much, in large part, due to your fine facilitation, graphic recording, and keeping us on track with a little homework!  
Sandy Holder, Director, Community Development Division, City of Carlsbad



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