

Karla Robertson

The Executive's NeuroCoach™



EDUCATION/CERTIFICATIONS

- B.S. Psychology & Marketing
- Professional Certified Coach (PCC)
- Master MBTI® Practitioner
- MBTI® Step I & II
- TKI, FIRO-B®
- Shadowmatch®
- SCARF

PUBLISHED AUTHOR

The Agile-Minded Executive:
Drive Better Results by Shifting How You Think

SERVICES

- Executive Coach
- Keynote Speaker
- Career Transition Coach
- Assessments

COACHING APPROACHES

- Face-to-Face
- Shadow
- Phone/Skype/Zoom

SPEAKER TOPICS (Sample)

- The Agile-Minded Executive
- Your Brain on Disruption
- Using the Power of a Storm
- Leading Beyond Circumstances
- Getting Your Message Heard
- Leading through Transformation

INDUSTRY BACKGROUND

- Consulting
- Consumer Products
- Healthcare
- Medical Devices
- Mortgage Banking
- Real Estate Development
- Telecommunications

Corporate Clients (Partial List)

- Willis Towers Watson
- Wells Fargo Home Mortgage
- Ready Capital
- Prometric
- Navitus
- Myers Development Co.
- Mercer
- L'Oreal
- Dean Health

EXECUTIVE COACH – KEYNOTE SPEAKER – PUBLISHED AUTHOR

KARLA'S LEADERSHIP PERSPECTIVE

Top leaders must have a developed and wise use of backbone and heart when engaging with others, an agile and adaptable mind, a solid sense of right and wrong, a talent for integrating rational and emotional intellect, the wisdom in how to gain and use opposing points of view to create the best solutions, the gift of lighting the spark of innovation in others, the courage to be candid when communicating, the ability to be decisive in the moment, the visceral fortitude to admit when one has made a mistake or had a hand in a wrongdoing, and the courage to know that to make anything happen, you have to get in the game, challenge your thinking and take your best shot.

COACH APPROACH

Karla's approach integrates brain science with business focus. She helps her clients win based on their definition of what winning looks like to them and their stakeholders. Her clients consistently define her candor, humor, directness and her ability to ignite insight in their minds and challenge their thinking as the hallmarks of her approach and value. She has earned trusted advisor status among her peers and executive clients by being a challenger, truth-sayer, sounding board and motivator. She works with senior level executives who, for example, wish to be more effective in: making presentations, building strong teams, getting their message heard, and dealing with emerging challenges in a volatile, complex and ambiguous economy. The relevance of her approach and work as a brain-based coach stretches across diverse industries and is the reason executives from top companies across the country seek her out. See testimonials at www.karlarobertson.com/testimonials

BIOGRAPHY

Karla Robertson's 25+ years in the corporate arena embodies specific expertise and success in sales, leadership, coaching and team building with particular focus in the mortgage banking and healthcare industries. As a Business Development Director with a leading national mortgage banking company, Karla was ranked #1 nationally for 6 consecutive years. She was responsible for breathing new life and increased results into existing programs through her innovative ideas and approaches and her ability to have them implemented. In addition to her role as a VP of sales with a leading pharmacy benefit manager, she also served as an advisor to the C-Suite and executive team to assist them in redesigning their sales process, their marketing message and how they approached the PBM business. She raised their sales team from "order takers" to consultative sales professionals. Through collaboration with her team, a coherent and innovative marketing message was created. The organization reclaimed their status as a leader in the industry and began to win business again.

Karla founded her company in 1999. She is a published author of ***The Agile-Minded Executive***, which drives to the heart of how our choices, not our circumstances, determine the course of our lives and how effective we are as leaders who get results. It reveals what influences our decision-making and provides powerful questions to help us make necessary mindshifts to stay relevant in our changing world. Due to her book's platform hitting a deep chord with audiences, she is gaining requests to be a keynote speaker at conferences and board meetings. Previously, Karla hosted her own internet-based talk show, "The Exelceration Zonesm" and has been quoted in The NY Times, MSNBC.com and other internet and national print publications.

Private: (Title/Industry)

- CFO – Retail-Consumer
- Co-Founder /Chief Creative Officer – Media
- CEO- Social architecture
- Chief Clinical Officer- Pharma
- Principal – Architecture
- President - Utilities
- SVP Mortgage Banking
- SVP - Banking
- VPs - Publishing
- SVP - Media
- Deputy Counsel - Legal
- GM - HVAC

Speaking Events: (Partial list) Keynote and Breakout

- CSEBA – CA
California Schools Employee Benefits Association
- SISC – CA
Self-Insured Schools of CA
- CAJPA – California
Association of Joint Powers Authorities
- NFMT – MD
National Facilities Mgmt. and Technology
- ISM – NY Institute for Supply Mgmt.
- ISM - NJ
- IHRIM – FL
International Assn. for Human Resource Information Mgmt.
- Ready Capital – NJ
- NYC Dept. of Education-
Office of Field Support – NY
- LeadNJ – NJ

MEMBERSHIPS

- ICF Member Coach
(International Coach Fed.)

PROFESSIONAL HISTORY

7/99 – Pres. Founding President—The Karla Factor LLC t/a Shifting Gears®
Executive Coaching & Keynote Speaking – Helping executives build healthier, more successful organizations by becoming better thinkers.

Never has there been a higher demand for executives who can mentally shift gears in the midst of ambiguity and complexity to get ahead of emerging demands and drive the actions that count. The key isn't to learn the latest "flavor of the month" to achieve success. The key is to start where decisions for actions and behavior are always made...in your mind. How you think becomes who you are and how you decide. The stories you tell yourself become the filter through which you make meaning of the world and all that happens in it. I work with executives to examine the systems thinking that is driving how they show up, interpret events that they confront every day and make choices for behavior and action. I help them become better thinkers who make better decisions and achieve better results to meet or exceed the goals, build strong teams and become better leaders and influencers.

1997-1999

Express Scripts, Inc.-VP, Sales-East Region

- Was #1 producer nationwide for large employer group.
- Redefined and created client acquisition process and raised sales presence to higher proficiency in consultative selling
- Increased business and re-established relationships with key consulting houses.
- Collaborated on creating new marketing message resulting in distinguishing our message in the marketplace which increased face-to-face meetings and receiving quality RFPs

1987-1997

Prudential Home Mortgage Company (now Wells Fargo Home Mortgage) 1992-1997-Marketing Director-Corporate Division

1987-1998

1987-1992-Business Development Manager-Wholesale Div.-#1 producer out of 70 BDMs for 6 consecutive years nationally

Accomplishments/contributions:

- Brought in over \$1B during my 10-year career.
- Created new marketing strategy for old product which resulted in increased volume.
- Created first seminar program for corporate clients which resulted in creating leads in this area of the business that hadn't been attainable before.
- Created and implemented new client relationship manual which resulted in improved client maintenance and retention and higher hit ratio of success on cross sell opportunities.
- Led task force to create program for the Deaf and Hard of Hearing

COMMUNITY SERVICE

- Having served Make-A-Wish Foundation of NJ for 16 years as a wish-grantor, Co-Chair of several fundraising dinners, and as a member of the Program Services Committee, I am now exploring other community service opportunities.