Coaching and Culture Change at New York Life

Anika Gakovic, Michael Molinaro, and Hy Pomerance

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This article discusses an approach for leadership development and change management that is based on commitment to the core values and mission of our business at New York Life. Several factors contributed to our reasons for change: the advent of a new Chairman, an internal executive retirement demographic, and a need to significantly accelerate leadership and management capacity in order to enable succession. Our intention is to share our experience in developing and implementing this program in a stable organizational and business environment. Specifically, we will address the role of the coach as the facilitator of a learning and change journey for high-potential employees; the diagnostic and learning activities that create space for new leadership competencies, relationships, and experiences; as well as techniques to motivate learners for joint ownership of individual leadership and organizational culture change.

BUSINESS CASE AND CONTEXT
New York Life is a US-based life insurance and annuity mutual company and a Fortune 100 company with AAA financial ratings. The “Company You Keep” provides a basis of meaning for both our policyholders as well as the employees of the company. For New York Life’s policyholders it refers to the firm’s financial strength, its ability to deliver on promises, its sound investment strategy, and the relationship with our agents. For employees, the New York Life brand stands for loyalty, dignity, and workplace that values collegiality and customer service in everything we do.

In July 2008, Ted Mathas became New York Life CEO. Ted immediately scanned the environment and recognized that despite the firm’s financial strength, the company was facing the worst economic crisis in decades. He decided to focus on the basics: execution, efficiency, and people. With core values in place for 165 years, Ted implemented a Talent Strategy that included succession planning and leadership development. The Talent strategy began with a deliberate focus on the top 350 senior people within the corporation. Prior to this, there was virtually no development or training opportunity for this population. Ted’s concern was obvious. With a significant retirement demographic and a fast changing business environment, he needed an organization that challenged the status quo, innovated, and was led by individuals who could see opportunities and take risks while maintaining the firm’s core values of integrity, humanity, and financial strength. These values translate into a social mission surrounding our business services and products. Life insurance is about doing the right thing. New York Life sells “Peace of Mind.” The firm’s values and ways of working are deeply embedded in this social connection. Therefore, all employees are expected to be able to describe the social benefit.
of life insurance because the customer is buying protection for his/her family. The customer mindset is about “preserving the family” and creating permanence for loved ones. Further, employees inside the organization feel connected to the social good that drives their customers to seek out New York Life’s products. On the other hand, the firm’s conservative mindset and risk-averse approach can bring a certain paralysis to decision making, lack of creativity, and a hierarchical approach to leadership.

That is the context within which we embarked on our Talent Strategy: Shift the mindset from one of rules and hierarchy to one of principles based on a “distributed leadership” model. Ted initiated a leadership agenda that began with asking questions. Noting that leadership is not about position in the hierarchy, Ted’s challenge to the company was to encourage more learning and innovation by challenging the status quo. Thus, a new “conversation” was launched across the company. Starting at the top, we initiated a series of discussions in large and small groups to understand the new set of leadership expectations and behaviors.

One of the first initiatives to address this need for change in how leaders think and behave was our Accelerated Leadership Program (ALP). The purpose of ALP is to identify and develop a series of cohorts of high-potential employees from the upper middle of the organization who could do two things: Advance the agenda of distributed leadership and solidify the talent pipeline when these employees do advance to executive leadership roles. The Leadership Development team within the Talent Development Group in Human Resources took on the challenge of designing the program architecture and delivering a tailored and integrated learning experience. At its core was a team of internal coaches. Following is our approach to designing the leadership development architecture and coaching system as well as our early observations, dilemmas, and lessons learned.

**DESIGNING AND LAUNCHING ALP**

As ALP is both a leadership development initiative and an effort to evolve the culture of the organization, the right level of sponsorship was sought for the program. A natural home for sponsorship was in the office of the CEO, as well as with the firm’s Executive Management Committee who committed to communicating the vision and purpose for ALP. A CEO invitation letter followed by a kick-off event which included the participants and their managers, positioned the business case for leadership development and investment in talent, and generated excitement about participating in the program.

The design of ALP was underpinned by a new Leadership Competency Model which had been launched a month prior to starting the program design. There are three primary skills areas within this new Leadership Competency Model: Leading...
Yourself, Leading Others, and Leading the Organization (see Tables 1, 2, and 3). While this broad framework itself is not new, the twelve behaviors that are further broken down into 36 skills do represent the basis for developing new leadership skills as well as for measuring leader effectiveness going forward. Based on a developmental philosophy that great leadership is first about understanding and building on strengths while being mindful of and addressing any gaps, the team moved to make choices on instructional design.

One early decision the designers made was the effective length of the program. Given the complex nature of the skills being considered along with the strong support for the program from senior management, there was both the need and the luxury for an extended multi-part design. The team agreed initially that a target of less than 18 months would be appropriate and required. As the design came together, the program emerged as 14 months long.

Another key decision about instructional design was the balance between cognitive and affective components. As a team we agreed on limited effectiveness of programs which were either highly...

Table 1. The New York Life leadership competency model – Leading yourself

<table>
<thead>
<tr>
<th>Leadership Behavior</th>
<th>Skill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Act with Integrity</td>
<td>• Set a personal example of what is expected from a leader at New York Life</td>
</tr>
<tr>
<td></td>
<td>• Take ownership for delivering on promises and commitments</td>
</tr>
<tr>
<td></td>
<td>• Treat everyone with respect and maintain an awareness of your impact on others</td>
</tr>
<tr>
<td>Communicate Openly</td>
<td>• Address tough issues directly with candor and honesty</td>
</tr>
<tr>
<td></td>
<td>• Share news, good and bad, on a timely basis to ensure that decisions are well-informed</td>
</tr>
<tr>
<td></td>
<td>• Create a safe environment where others can express ideas and give constructive feedback</td>
</tr>
<tr>
<td>Seek Challenges</td>
<td>• Set and pursue the highest standards of excellence</td>
</tr>
<tr>
<td></td>
<td>• Take on new challenges and gain experiences across different businesses and functions</td>
</tr>
<tr>
<td></td>
<td>• Persevere when dealing with complex or untried initiatives, even when there is a risk of failure</td>
</tr>
<tr>
<td>Learn From Experience</td>
<td>• Actively pursue learning from both successes and failures</td>
</tr>
<tr>
<td></td>
<td>• Admit mistakes and change behavior based on constructive feedback from others</td>
</tr>
<tr>
<td></td>
<td>• Let go of behaviors that are no longer effective</td>
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</tbody>
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cognitive in their developmental focus as well as the limited usefulness of those programs which overweigh the affective aspects of development. Examples of these would include some case-based, cognitively focused business school executive education programs, or highly experiential and feedback-focused leadership training. Therefore, the design bias in ALP was to create a true blended learning approach to development of these high potential employees. The term blended learning is often used in the field of instructional design to mean a mixture of delivery methodologies to support the instructional goals of a program. In this way of thinking, a blended learning approach to leadership development might include a mix of e-learning and classroom-based training targeted to achieve a narrow set of training or developmental goals. Our approach to blended learning was to focus on a blend of the cognitive and the affective (see Figure 1) rather than a focus on delivery methodologies, although such a mix could become a viable choice.

### Table 2. The New York Life leadership competency model – Leading others

<table>
<thead>
<tr>
<th>Leadership Behavior</th>
<th>Skill</th>
</tr>
</thead>
</table>
| Develop Talent      | • Invest the effort necessary to cultivate and recruit talented people  
                      | • Provide constructive feedback and opportunities that helps others develop  
                      | • Empower others to think critically and make decisions |
| Inspire Others      | • Demonstrate a visible presence that connects with and energizes others  
                      | • Motivate others to stretch beyond their comfort zones and exceed their own expectations  
                      | • Foster diversity and inclusion within work teams |
| Promote Diversity   | • Engage people from diverse backgrounds to bring new perspectives to business challenges  
                      | • Understand the needs of diverse talent and develop people from different backgrounds  
                      | • Communicate the business case and importance of diversity to the Company |
| Build Effective Teams| • Promote teamwork and collaboration across business units and functions  
                      | • Give feedback and guidance to individuals in ways that improve team performance  
                      | • Create an environment that values and rewards the contributions of the entire team |
The cognitive elements of the design are primarily delivered through a relationship with a United States business school that provide articles from their monthly business journal and its extensive library, case studies, e-learning modules, and live virtual classroom sessions with their faculty. This is mediated through a dedicated website that delivers content and keeps program participants connected to each other as well as tracks progress on assigned work.

The affective aspects of the learning are delivered in partnership with an international leadership skills development company with whom we have designed the face-to-face residential experiences. This learning often takes the shape of challenge activities, in which small groups work on and then process their approach with a facilitator against the background of our Leadership Competency Model.

<table>
<thead>
<tr>
<th>Leadership Behavior</th>
<th>Skill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop Strategy and Set Direction</td>
<td>• Translate Company objectives into specific strategies and initiatives</td>
</tr>
<tr>
<td></td>
<td>• Establish clear and compelling priorities and rally support for their achievement</td>
</tr>
<tr>
<td></td>
<td>• Develop and communicate a vision for the future with clear performance targets</td>
</tr>
<tr>
<td>Achieve Operational Excellence</td>
<td>• Track ongoing operations and processes to quickly remedy performance issues</td>
</tr>
<tr>
<td></td>
<td>• Actively support and reward ideas to increase efficiency, improve processes, and innovate</td>
</tr>
<tr>
<td></td>
<td>• Instill in others a sense of urgency and a focus on client service</td>
</tr>
<tr>
<td>Deliver Business Objectives</td>
<td>• Manage costs to maximize profitability and growth for the Company</td>
</tr>
<tr>
<td></td>
<td>• Establish key metrics to ensure business objectives are being met</td>
</tr>
<tr>
<td></td>
<td>• Effectively work across functions to capitalize on the experiences and expertise of others</td>
</tr>
<tr>
<td>Ensure Alignment with NYL’s Core Values</td>
<td>• Align business priorities with New York Life’s commitment to deliver on promises</td>
</tr>
<tr>
<td></td>
<td>• Resolve issues and conflicts with the Company’s best interests in mind</td>
</tr>
<tr>
<td></td>
<td>• Demonstrate how New York Life’s mission, products and services create value for policy holders</td>
</tr>
</tbody>
</table>

Table 3. The New York Life leadership competency model – Leading the organization

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While it is true that in a multi-part design such as ALP there are aspects which are weighted more heavily to either the cognitive or affective side, the team worked to create a balance in the time learners spent in each space, and to support cognitive-affective integration. Coaching was built into the program design to do this: to support both cognitive and affective aspects of the learning.

An additional development philosophy embedded in the program was the belief that “a great question beats a great answer,” and that really great questions have multiple, complex answers. In other words, rather than frame the learning objectives in the typical behavioral format which take the form of “Those who successfully complete this program will be able to…” the design team chose to frame the objectives as a series of questions which would be answered in multiple ways at multiple instances throughout the course of the program. These questions were linked back to our Leading Yourself, Leading Others, and Leading the Organization framework embedded in our Leadership Competency Model.

The questions were as follows:

- How do I understand myself as a leader?
- How do I shape the future of New York Life?
- How do I inspire others to excellence?

In turn, these questions became the basis for the overall design architecture of the program (see Figure 2) and the foundation for coaching work.
Coaching role
Because we believe that asking great questions and engaging in meaningful dialogue are the foundation of leadership development and culture change, the role of coaching was seen as central to the design of ALP. The coaching work unfolds in a developmental sequence, starting with facilitating and accelerating learning through these phases:

- **Personal Development.** Every ALP participant is assigned a development coach who works with them over the 14-month period to provide:
  
  - Improved self-awareness through multi-rater feedback based on the NYL competency model (discussed earlier and shown in Table 1) and psychometric testing (Hogan assessment suite including the strengths, challenges, and values inventories);
• Development planning support and assistance to link program goals to the participants’ individual development needs in their current role and their career;

• Pre-and post-residential support to both prepare participants for the experience they will undertake and help them process what they have just undergone in the residential module;

• Sustained momentum between program modules that helps internalize and deepen the learning; and

• A role model for coaching to build the leadership capability to coach others.

• In-Residence Coaching. In the context of the three large residential anchors of the program, participants are coached in groups of seven or eight by program facilitators who are experts in developmental exercises and small group process.

• Peer Coaching. Again, in the residential context participants are trained to provide feedback to their cohort peers regarding performance, behaviors, and various modes of their leadership approach. The peer relationships also establish a valuable network for navigating the company.

• Action Learning Coaching. Throughout the 12-week action learning component of the program, a coach is assigned to each team in order to help point to, understand, and manage learning in the context of complex problem-solving, teamwork dynamics, and project work.

We recognize that leadership development is not linear and unfolds through practice and feedback. Therefore, coaches help participants experiment with new behavior and apply their learning to their work by connecting the ALP lessons to reality, providing support to build new skills, and creating experience of progress by defining milestones and ensuring meaningful feedback. In the long-term, coaches will help participants evolve as leaders who can create their own authentic leadership style, and navigate new and existing relationships, establishing themselves as company influencers who will shape the business direction.

Early observations
Two key aspects supported the success of launching ALP: executive team sponsorship and clarifying the business context for leadership development. In terms of sponsorship, the ALP program began with a CEO letter and kick-off event that generated excitement by communicating the vision and business case for leadership, as well as positioning the development program as an investment in talent.

Noting that leadership is not about position in the hierarchy, Ted’s challenge to the company was to encourage more learning and innovation by challenging the status quo.
Regarding context, in order to manage leadership expectations and set the tone for evolving the culture, we discussed the distributed leadership competency model as the basis for ALP. Further, in order to link development to business reality and demonstrate support for learning, managers also attended the kick-off event and engaged their participants in dialogue about their strengths as well as underutilized competencies. This was the beginning of defining the coaching focus and development planning.

After successfully launching ALP, coaches began building the client relationship and readiness for learning by exploring personal goals, program vision, and coaching purpose, as well as rules of engagement – specifically, confidentiality of the coaching conversation and assessment data. Ensuring confidentiality of development conversations was critical for creating trust and openness with participants, especially for internal coaches who were exposed to human resource processes such as performance management and talent assessment. Therefore, we communicated clear role boundaries to all company stakeholders. Also, we handled any inquiries about participant data through conversation that reinforced the importance of confidentiality for learning through coaching. Further, we reiterated our commitment to confidentiality at the point of debriefing assessment data to ensure that participants felt safe to explore their leadership behavior habits and build their self-awareness. The purpose of emphasizing confidentiality was to create a safe space for dialogue with participants that would enable them to learn and grow as leaders. Also, an open and honest dialogue about participants and the company culture helped identify personal development needs and grounded the development planning in business reality.

We found that the 360 feedback customized to our new Leadership Competency Model worked well in combination with the Hogan inventory suite. This assessment data provided a way to increase leader self-awareness about both perceived behavior that was reflected in the 360 as well as reasons for the behavior habits that are addressed through the Hogan personality assessment. When introducing the Hogan, it was critical to explain that the focus was on normal adult personality and that there were no expectations that individual outcomes would follow a pre-determined pattern of a “right way to be.” This is a counter-intuitive notion for an insurance company where success is based on actuarial precision in diagnosing the right patterns. Similarly, the 360 feedback introduction included an overview of the thorough methodology used to create the competency model and the sponsorship from senior leadership. It was also important to clarify that the 360 purpose was to focus on leadership development instead of performance management. The intention was to minimize any participant anxiety about informing compensation decisions.

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An additional development philosophy embedded in the program was the belief that “a great question beats a great answer,” and that really great questions have multiple, complex answers.
After debriefing assessment and feedback data, we asked participants to articulate their personal goals, consider business objectives, and apply their understanding of the data to create a development plan. By engaging the manager in dialogue, the development planning was grounded in outcomes valued by the company as well as ensured accountability and support. Further, in order to facilitate development progress, participants are keeping a learning journal which helps them process the program experience, capture insights for future reference, and inform the coaching dialogue.

As ALP participants engaged in the process of evolving as leaders, we found dialogue to be a powerful method for discovery and learning. Our participants are embracing the challenge of asking great questions and building self-awareness. This focus on reflection and conversation is counter-intuitive in a work environment that emphasizes getting things done. Further, the development journey is based on experimenting with being a leader and leaving their comfort zone to identify action opportunities, practice new behavior, and debrief leadership experiments with their coaches. This requires letting go of knowing the answers and being right, which is a challenge in a risk-averse culture. It is an example of how ALP will help the company culture evolve from a hierarchical approach to leadership towards one where decisions are made at all levels (i.e., distributed leadership).

Initial feedback from participants shows that relationships with program peers are adding value to their ALP experience. Coaches are bringing this development opportunity into focus by helping participants process the peer interactions as well as identify and debrief opportunities to experiment with new relationship skills. In order to achieve learning integration, coaches are connecting the peer learning to the work context and to the other ALP elements (discussed earlier and shown in Figure 2). The ALP peer community is evidently strengthening beyond the program architecture, as participants have created a happy hour schedule and engage in regular email exchange of ideas. This reinforces the importance of a robust nomination process to ensure meaningful peer interactions (discussed in the next section).

Dilemmas and lessons learned
ALP participant selection was critical for ensuring the quality of the development experience for everyone and for positioning the program for success. We used an iterative process involving our Human Resources Business Partners (HRBP, a formal, internal group) as liaisons with people managers and an approval process that engaged the CEO and the Executive Management Committee. The first iteration of nominations was based on talent review discussions which ensured a consistent calibration of criteria and identification of high-potential talent. The next step in the nomination process involved the HRBP as liaisons who initiated We recognize that leadership development is not linear and unfolds through practice and feedback.

Ensuring confidentiality of development conversations was critical for creating trust and openness with participants, especially for internal coaches who were exposed to human resource processes such as performance management and talent assessment.
dialogue with people managers. The final approval of nominations engaged the CEO and the Executive Management Committee as sponsors of the program. This nomination process ensured the right people were selected for the leadership development opportunity. However, it required talent differentiation that touched a cultural nerve because of a legacy behavior norm of getting along by not standing out. The nomination process also created tension by requiring HRBP members to have a different type of conversation with people managers. From this we learned about our own development needs and operating model improvements for Human Resources. Ultimately, the nomination quality was validated with positive feedback from participants about the value added to their learning through peer relationships.

Another development dilemma is balancing personal goals with business demands. This is also the paradox of leadership and a coaching challenge. For example, participant aspirations for career mobility create succession planning demands for their managers and possible anxiety for them—both because of support necessary to implement career mobility as well as questions that arise about the manager’s career options. Similarly, the coaching work raises the expectations of participants for what their manager does to support their leadership development. Therefore, we learned to contextualize the coaching by being sensitive to the organizational dynamics and business environment in how we communicate with our participants and stakeholders. In the long run, we are working to evolve the company culture towards all leaders facilitating coaching conversations.

An additional challenge for the coaches is to create a flow of client conversations and depth of the relationship that will keep participants engaged in the program over the 14 months while balancing the leadership development with their work demands. Coaches agreed on a communication plan to ensure participants were integrating and internalizing the learning. This involved creating a structure of touch points around key program elements (e.g., residential modules, reading and writing assignments) as well as leaving room for participants to reach out to discuss insights and work issues. As discussed earlier, highlighting confidentiality in order to create participant trust and openness, as well as to avoid any role conflict for internal coaches, was critical for building coaching relationships. Ultimately, these efforts allowed us as coaches to create a consistent and tailored development experience for all participants.

Leveraging internal faculty to deliver ALP is a great development opportunity for the Talent Development team and a way to connect the company context. One challenge is assessing who can do what; for example, team members have different strengths for individual development coaching or facilitating action learning and group reading discussions. A related challenge is to connect
the variety of individual and group coaching work done by the coaches and program facilitators. We learned that building a coaching community made it possible to understand team member strengths, support professional development, and ensure we are achieving program objectives and delivering a great development experience for participants. Specifically, to build our coaching community and grow as professionals, we kicked off our work with a “Faculty Pep Rally” that involved discussing program vision and purpose, sharing who we were as individuals, and declaring why we were committed to the leadership development work. Further, we agreed on supervision expectations and rules of the road for how we will work together as a team. For example, we implemented monthly meetings to discuss coaching methodology, address issues, and learn from each other. Similarly, group facilitators meet to discuss ALP reading assignments and agree on the approach to debriefing the learning with participants. Finally, we rely on email updates and an online program portal to stay current with the program and to be able to integrate the learning experience for our participants.

CONCLUSIONS AND THE FUTURE

ALP and the coaching work are educating the company about the strategic importance of leadership development and the role of leaders in developing talent for the future. In addition, they are creating trust and engagement necessary to execute business goals. Coaches are critical for maximizing program impact by helping participants integrate their development experience and commit to lifelong learning as leaders. Accountability is a key success factor. Therefore, to ensure learning transfer and sustainability of leader development, we are working on individual and organizational accountability by aligning messaging about success expectations, recognition, and career advancement. We are also taking an enterprise perspective by centrally driving consistent talent development practices and standards across the company to ensure alignment with organizational goals. ALP is only a beginning of a new way of working for participants who will stay engaged as program alumni by participating in mentoring, program facilitation, and action learning. They will continue to seek and discover development opportunities in everything that they do. Therefore in the future these leaders will emerge as coaches, change agents, and role models for distributed leadership.

ALP is also a test of the Talent Development team’s capability to deliver a sophisticated learning solution and organizational readiness to absorb an intense leadership development and culture change effort. We realize that building a leader pipeline will not happen overnight. Our culture change effort will require patience and persistence for at least five years before we see the results. Initial feedback from participants and business managers is very positive. We have noted the perceived quality of the learning experience, a willingness to experiment with new behavior, and commitment to…

Our participants are embracing the challenge of asking great questions and building self-awareness. This focus on reflection and conversation is counter-intuitive in a work environment that emphasizes getting things done.
evolving as leaders. We are working to define metrics based on the new Leadership Competency Model and business objectives that will further demonstrate impact of ALP. Our urgency for change accelerates as our current company leaders retire and the industry landscape gets more complex and competitive. The evidence of ALP success will come from having prepared leaders who are ready to step up as successors in executive leadership roles, grow the business, and continue the brand legacy of the “Company You Keep” for New York Life employees and customers.

Our urgency for change accelerates as our current company leaders retire and the industry landscape gets more complex and competitive.
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Anika Gakovic has ten years of experience in leadership development, change management, team building, employee engagement, strategic planning, and organizational design. Anika joined New York Life in 2009 as Corporate Vice President in Executive Development and previously worked in Leadership and Learning Development roles at HSBC, UBS Financial Services, MetLife, and JP Morgan Chase. Anika completed her PhD and MA in Industrial Organizational Psychology at University of Houston. Anika’s presentations and publications focus on a range of topics including executive development, employee engagement and motivation, and driving people strategy through learning and change management. Anika served on the Board of Directors for New York HR Planning Society (NYHRPS), and participates as a coach for the Business Plan Competition at New York University Stern School.

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