



Strategic Leadership COLLABORATIVE

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STEPHEN L. COHEN Ph.D., C.P.T.

Steve Cohen is Founder and Principal for the Strategic Leadership Collaborative, largely focused on advisory services for the training and education sector; namely, Board membership, strategic planning and business coaching. Complimentary expertise includes: leadership development, performance and succession management, senior team strategy alignment, and industry research. Prior to this, he served as Senior Vice President of Global Solutions for Right Management's Leadership Development Center of Excellence; Vice President/General Manager for Carlson Marketing's Custom Learning group; Executive Vice President for Dove Consulting's Learning Solutions Group; Founder and CEO of the Learning Design Group; Executive Vice President for Product Development and the Interactive Technology Group for Wilson Learning; and Co-Founder and Executive Vice President for Assessment Designs Int'l.



Consulting Experience

Dr. Cohen is a 40+ year veteran of the human resources management field, having founded or led, and sold a number of talent management firms focused on education and learning with a strong concentration in leadership strategy and development. Steve earned worldwide recognition for his accomplishments in this field when named as one of the industry's "thought leaders" by the American Society for Training & Development, now the Association for Talent Development. Built on a solid academic and research foundation, his experience has brought the appropriate amount of discipline and rigor to every one of his engagements. During his career, he has advanced the strategies of corporations around the globe, creating hundreds of groundbreaking performance improvement and learning solutions in the areas of leadership, performance management, and personal effectiveness.

For the first 30 years of his career, Steve focused on talent assessment and development. As one of the learning industry's experts on the "art, science, and business" of program development, Steve has strategically directed the creation of over 100 off-the-shelf training products as well as nearly 1,000 custom learning systems. In addition, he has pioneered online and blended learning solutions for over 30 years. Steve is considered one of the world's most forward-thinking experts on leadership learning strategies, competency modeling, curriculum development, and integrated performance improvement systems. He has shared this expertise with well over 150 major corporations, providing them with strategic insight into leadership development and talent management solutions.

Steve's organizational consulting experience is broad and deep, having consulted in many industries such as: technology (e.g. IBM, Cisco, Dell, Microsoft, Motorola, Texas

Instruments, Xerox); financial services (e.g. American Express, Bank of America, Wachovia); pharmaceuticals (e.g. Johnson & Johnson, Pfizer, Schering-Plough, AmerisourceBergen, Wyeth); consumer/food products (e.g. American Greetings, Campbell Soup, Colgate-Palmolive, Disney, General Mills, Mars); transportation (e.g. Ford, General Motors, Textron, Navistar, UPS); and government (e.g. F.A.A. Dept. of Transportation, U.S. Treasury, Dept. of Defense). He also has significant international experience having consulted in more than 15 countries.

While he has kept his toe in the corporate talent development arena, in the last 10+ years, he has spent the majority of his time advising and counseling education and training suppliers all over the world on how to build and grow their businesses. Given his history of having founded and/or led 8 different industry suppliers, he has been frequently called upon to provide Board advisory services, strategic planning guidance, and business coaching consulting.

Following are representative samples of the initiatives he has been called upon to address for some of these clients.

Client Work

Business Planning and Growth: As noted, because of his extensive experience in the education and training industry, Steve has been called upon as a leading strategy and business planning consultant for both existing and newly formed training and education firms who are focused on long term growth and profitability. The vast majority of this client work has involved some element of research, Board service, strategic growth planning, and executive business coaching. A representative sample of these initiatives includes:

- Development of a benchmark research report on the pre-hire assessment industry for a private equity firm interested in identifying potential “toolkit” suppliers to be used by its portfolio companies.
- Research and facilitation of a process to identify and re-shape a going forward product and service strategy for a long-time assessment and training business.
- Research and facilitation of a 5-year strategic growth plan for a non-profit Florida-based CDFI (Community Development Financial Institute).
- Research, development and facilitation of a 3-year strategic growth plan for a global e-learning business located in Norway and Scotland focused on the oil and gas industry.
- Facilitation and development of a 3-year strategic growth plan for a newly merged organization of three former consulting/training firms in the global governance, risk and compliance industry.
- Transition and business coaching for a new CEO given the leadership reigns by the founder of a leading international learning and development business.
- Facilitation for the development of the Vision, Mission and Values for a group of automotive dealerships planning to expand nationally and cascading it throughout the organization.
- Development of a 5-year strategic growth plan, and subsequent update, for a national for-profit education company serving at risk and special needs children.
- Creation of a business and 3-year strategic plan for a training and learning services firm focused on developing behavior management skills for duty-to-care professionals in the health care and education industries.

- Research and development of a business plan for a regional economic development corporation to establish a leadership education economic sector to promote social and economic development in its region.
- Creation of a short and long-range strategic plan for a leading state university's newly formed leadership institute.
- Development of a research document which assessed the state of the nursing education industry in the U.S. to update clients of an investment banking firm.
- Working with the hotel division of a large hospitality conglomerate to create their training and learning strategies.
- Development of an organizational and leadership assessment for a relatively new fast growing regional performing arts center.
- Building a Service University business plan for an international hospitality organization.

Leadership Strategy and Development: His experience as a supplier over the years has involved directing the discovery, design, development, and delivery of off-the-shelf and custom leadership and customer service strategy and learning programs for audiences ranging from individual contributors to first-line supervisors to senior executives. A representative sample of these initiatives includes:

- Development of a competency model, creation of an assessment inventory based on the model, and a developmental action planning process for senior leaders in the electronic payments industry, followed by a one-hour feedback session to each participant.
- Design, development and delivery of a director level "leaders developing leaders" curriculum for two industry leading global pharmaceutical and consumer health products organizations.
- Design, development and delivery of two 1½ day workshops for senior leaders on coaching and collaboration for this leading financial payments business.
- Creation of a service excellence video-based product for one of the world's leading business schools publishing division.
- Design and development of a CEO/GM leadership conference for the customers of a major international farming cooperative.
- Design and development of a high potential leader curriculum for the next C-Level executives for a large space and defense contractor.
- Design, development and delivery of a Leadership Academy for the top emerging global leaders for a specialty chemicals manufacturer.
- Design and development of a front-line customer service program for the learning institute of one of the world's most well-known guest service brands.
- Global implementation of an action learning program for 1500 senior leaders of a world-leading pharmaceutical company.
- Creation of supervisory and management development programs for worldwide distribution in a leading entertainment/consumer products company.
- Development of first, second and senior level programs for a new leadership talent management system in a leading global hospitality organization.
- Creation of a centerpiece transition leadership program for director level executives of a world-renowned confectionary and consumer foods company.

- Coaching of several relatively young entrepreneur leaders of small, but fast growing businesses.
- Design and development of a front-line customer service training program for a national multi-branded portfolio of automobile dealerships.

Strategic Leadership Expertise

Steve has demonstrated a proven track record for building equity by growing top and bottom-line performance for eight different consulting enterprises in the education and training industry he has either founded, led and/or sold. His significant entrepreneurial skill, business acumen, and hands-on people development capability has earned him one of the best reputations in the industry. Because of this experience and expertise, he has been called upon to consult with some forty training and education firms needing strategic guidance in sales and marketing, product development, technology enabled learning, industry and competitive analysis and long-range planning. In addition, he has worked "inside" a large corporate enterprise contributing to its highly successful talent development efforts.

Steve has also had the good fortune to work with world renowned authors in converting their intellectual capital to hands-on learning and development experiences. Among those for whom he has built training programs based on their books are: Tom Peters (*Liberation Management*), Jim Kouzes (*The Leadership Challenge*), Bill Ury (*Getting to Yes*), Michael Watkins (*Right from the Start*), Len Schlesinger/Jim Heskett/Earl Sasser (*Achieving Extraordinary Service*), Steve Drotter (*The Leadership Pipeline*), David McNally (*Even Eagles Need a Push*), Louis Patler (*If It Ain't Broke, Break It*), and Nick Tasler (*The Impulse Factor* and *Why Quitters Win*), among others.

He has served on many Boards of education and training organizations and currently is a member of the Board of Trustees of Hobart and William Smith Colleges, having served as the Chairs of its Human Resources & Compensation, and Governance Committees. Over his career, he also has served on 22 different Advisory Boards in the training and education industry, including: Interaction Associates; Better Communications; ExperiencePoint, Herrmann, Int'l., Integrity Solutions, NetSpeed Learning, TrainingFolks, Lexipol, and Grace Hill, the latter two being Boards of private equity firm, The Riverside Company. He has also served on the Boards of three other firms under The Riverside Company umbrella, Crisis Prevention Institute, Employment Law Training/NAVEX and OnCourse Learning, having participated in preparing each of them for eventual sale and/or merger. Furthermore, Steve has been an avid volunteer to the industry, having served in leadership and individual contributor positions for organizations such as Association of Talent Development (ATD, formerly ASTD) and the Instructional Systems Association, receiving numerous awards for such contributions. He currently authors a monthly blog for ATD on leading and growing talent management consulting businesses.

Education and Training

Steve received his B.S. in Psychology from Hobart College and earned both Masters and Doctoral degrees in Industrial/Organizational Psychology from the University of Tennessee. He has also obtained the Certified Performance Technologist designation from the Int'l. Society for Performance & Instruction, and completed the Carlson Executive Education Program through the University of Minnesota.

Publications and Appearances

Steve has authored more than 150 articles, chapters, and presentations on a wide spectrum of talent management topics, including two blogs he has written for the Association of Talent Development, noted immediately below.

<https://www.td.org/insights/growing-talent-development-firms>
currently monthly, 2014-present

<https://www.td.org/Publications/Blogs/Learning-Executive-Blog/2015/06/Intellectual-Capital-An-Introduction-for-Senior-Leaders>, 2016.

Selected examples of this work, including his recently published book, are:

Cohen, S. L. *The Complete Guide to Building and Growing a Talent Development Firm*. Association for Talent Development, Alexandria, VA, March, 2017.
(www.td.org/BuildandGrow)

Cohen, S. L. *12 Steps to Building and Growing a Successful Talent Development Firm*. Pre-Conference Workshop, ATD, Alexandria, VA, May 18, 2019.

Cohen, S. L. and Wilde, K. *Power-Up Your L&D Partnerships*. Chief Learning Office, Media-Tec Publishing, Oakland, CA, July-August, 2019.

Strategic Thinking vs. Strategic Planning: One and the Same? Advisor IQ by ExecRanks, YouTube Post, June 28, 2018
<https://www.youtube.com/watch?v=IB51D81X0GI&feature=youtu.be>

Cohen, S. L. *How to Build and Grow a Successful Talent Development Business*. Presentation at ATD's International Conference, Atlanta, GA, May, 2017.

Cohen, S. L. *12 Steps to Building a Successful Talent Development Firm*. ATD Webcast Series, March 16, 2017.

Cohen, S. L. *How to Create Value with Intellectual Capital*. I.S.A. Webinar Series, January 30, 2015

Cohen, S. L. and Whiteley, R. *How to Effectively Create, Manage and Leverage a Company Board*. I.S.A. Annual Business Retreat, March 19, 2014, Scottsdale, AZ

Cohen, S. L. *Leading With Integrity: Walking Your Talk*, in *Developing Talent for Organizational Results: Training Tools From the Best in the Field*. E. Biech, Ed., Pfeiffer-Wiley, New York, pp. 177-184, 2012.

Cohen, S. L. *The "L" Word: Leader Leading and Leadership – One and the Same?* *Leadership Excellence*, Executive Excellence Publishing, LLC, Provo, UT, July, 2011.

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Cohen, S. L. and Wilde, K. *Teaching Leaders: Use a Five-Step Approach*. *Leadership Excellence*, Executive Excellence Publishing, LLC, Provo, UT, Vol. 27, No. 9, September, 2010.

Cohen, S.L. Wilde, K., Bethune, C. Leaders Teaching Leaders. *Chief Learning Officer*, MediaTec Publishing, Inc., Oakland, CA, May, 2010.

Cohen, S. L. The Current State of Talent Management. Presentation at the Encompass Forum for The Riverside Company, Houston, TX, March 2, 2010.

Cohen, S. L. Global Leadership Requires a Global Mindset. *Industrial and Commercial Training*, Emerald Group Publishing, Ltd., Bingley, UK, January, 2010.

Cohen, S. L. Linking Coaching to Business Results. *The Linkage Leader*, Linkage, Inc., Burlington. MA, May, 2009.

Cohen, S. L. Four Key Leadership Practices for Leading in Tough Times. *The Linkage Leader*, Linkage, Inc., Burlington, MA, April, 2009.

Cohen, S. L. New Leaders: Coach Them for Success. *Leadership Excellence*, Executive Excellence Publishing, LLC, Provo, UT., October, 2008.

Cohen, S. L., Gardner, W., and Lang, K. Sustaining a Competitive Advantage by Developing Your High Potential Talent. *Best Practices in Leadership Development Summit*, Linkage, Inc., Palm Desert, CA, October 14, 2008.

Clevette, R. D. and Cohen, S. L., Selling and Implementing Leadership Development: Chapter, Verse and Lessons From Carlson's Story. *Performance Improvement*, ISPI, Wash. D.C., July, 2007, pp. 15- 24.

Cohen, S. L. and Pine, B. J., Mass Customizing the Training Industry. *Training & Development*, ASTD, Alexandria, VA., June, 2007, pp. 50-54.

Cohen, S. L., Deege, A. And Brewer-Frazier, U., Learning Tools: New Tricks for Non-Technical Learners. *Chief Learning Officer*, MediaTec Publishing, Oakland, CA., December 2006, pp. 36-41.

Cohen, S. L., Controlling Program Evaluation. *Performance Improvement*, ISPI, Wash. D.C., September 2005, pp. 23-26.