

# Customized Programs for Companies, Agencies, and Associations:

## Client Feedback About Lois Phillips, Ph.D.



### Workshops, Professional Development, and Trainings

#### Communication Coaching

Lois used a creative planning model for training and coaching in presentation skills that involved creating an interdisciplinary team of associates to help me plan a strategy for making effective presentations to investment bankers and major new accounts. The company's future expansion depended upon my ability to be persuasive and convincing. My time with Lois was a good personal investment. I gained valuable strategies as well as tips and techniques for preparing future presentation to different audiences that will serve me well as our company moves forward. I would recommend Dr. Phillips as a coach to anyone wishing to improve his or her confidence and skills in this area.

*Ronald J. Boehm, CEO/President  
ABC-CLIO / Intellimation*

#### Training

Lois Phillips was chosen to provide training in Preventing Sexual Harassment in the Workplace (compliance with CA AB 1825) because she was an experienced presenter with a solid background. We were very pleased with her presentation, which, in addition to an explanation of laws and guidelines, included customized case studies. Dr. Phillips skillfully facilitated lively discussion and interaction and answered the tough questions thoroughly and forthrightly. The feedback was very positive and most expressed appreciation of the customized case studies designed for our company.

*Ms. Sandy Fatano, HR Director, Allen Associates*

"Ms. Phillips led a very successful training session with our senior physician leadership. It was designed to improve their presentation skills and confidence in front of small to medium sized groups. Subsequently, I received independent feedback that there was a noticeable improvement.

Ms. Phillips' book (*Women Seen and Heard: Lessons Learned from Successful Speakers*) shed some real insight into my speaking skills and ways to improve and we used it as a frame of reference for fine-tuning my conference and recruiting presentations. I recommend it!"

*Mary Jo Gorman, MD, MBA;  
Physician Advisory Board  
IPC The Hospitalist Company*

"On behalf of the UCD Women's Resources and Research Center and the Department of Psychiatry, I would like to extend a great big thank you for facilitating the truly outstanding workshop on "Fragmentia" on May 31. "Your presentation was very well received, as exemplified by such typical comments as: "Excellent speaker, refreshing"; "Incredibly well prepared, marvelous presenter"; "Very warm and responsive"; "This was the most marvelous program of the year. Bravo, Bravo!"

*University of California, Davis  
Marti Hanna, Acting Director  
Women's Resources and Research Center*

Your preparation and participation in making the USC Summer Executive Program is much appreciated. Overall, the participants found the course to be valuable and worthwhile; your presentation on "Creativity" was well-organized and provided useful insights and good group interaction.

*Susan Chao, USC Office of Executive Education*

Thank you for your leadership and participation ...during the second annual HR2000 conference: Managing Cultural Diversity. Surely, the HR professionals who attended your workshop learned from it and will be able to apply their new knowledge to their own work arenas. Your generosity in sharing your expertise and experience in the field of multicultural diversity is greatly appreciated.

*Rosalind Schwartz, UCLA Institute of Industrial Relations*

### Corporate/Association Meetings & Business Conferences

#### Speaking

What a delight you are: interesting, charismatic, funny.... I loved your Women's South Coast Business Network talk, as did everyone there.

*Kate Silsbury, American Express  
Financial Advisors*

"Thank you so much for being the speaker at our July meeting of the Personnel Association. Our attendance was higher than normal for a summer month-obviously people were eager to hear you, and the topic was of importance. And, as usual, you were great. The Board of Directors met the evening following the general meeting, and they, too, all expressed enthusiasm about your presentation... and about how hard it is to get enough of the "good stuff" in a short luncheon meeting."

*ABC-CLIO  
Kerry McCoy, Vice President*

On behalf of the Santa Barbara Purchasing Management association, thank you for your presentation "Fragmentia in the Marketplace!" As

evidenced by audience participation the various ideas and scope of your material was well matched to the needs of the audience. Our members and guests gained valuable insight and understanding which will serve them professionally.

*Sam Spreitz, Director PMA*

Our sincere thanks for your dedication and service in the presentation "Total Quality Meetings" at the Chapter meeting. The feedback suggested that you delivered some significant ideas concerning teams and how to hold meetings. Additionally, the participants were very impressed with your speaking and presentation abilities. ...thanks for your willingness to add a spark to these turbulent times.

*J. Scott Burd, VP Association for  
Quality and Participation,  
Gold Coast Chapter*

"We would like to take this opportunity to thank you for being a facilitator at the Bridging Medical Care & Communities to Improve the Health of Women 50+ conference. One area where we have received overwhelming positive feedback is in the flow of the conference and the quality of the breakout sessions-neither of which we could have achieved without your help."

*California Medical  
Association Foundation  
Carol A. Lee, Esq., President and CEO*



## Client Feedback About Lois Phillips, Ph.D.

A great Rotary program last week about male/female communication! Lois Phillips handled a sensitive, yet vitally important subject, before a .....how do I say this?.....somewhat "traditional" group of men, with confidence, clarity, style and tact. She addressed us in a way that kept my interest and made me WANT to listen. I really enjoyed it. It was a worthwhile program!!!!

*Bob Fatch, Santa Barbara Rotary International*

### **Strategic Planning and Board Retreats**

"You were brilliant. May good things emerged (from our Board Development Process including) understanding the committee structure and the importance of committee work, and "Bonding!" You amazingly accomplished all of the tasks! Bravo to you!"

*Dr. Lois Jovanovic,  
Chief Scientific Officer  
Sansum Medical Research Institute*

"I wanted to thank you again for the fantastic work you did as our facilitator at our April Retreat. You are a person who not only completes all of the contracted deliverables, but also goes beyond what is required to ensure the event is a success.

Even now, six months after the Retreat, my Board members remain energized and inspired! Not only was your work wonderful—I, my staff, and Board had fun working with you. As many people can tell you, working with physicians can be challenging. Your ability to draw them into thoughtful discussion was superb."

*Carol A. Lee, Esq., President and CEO  
California Medical Association  
Foundation*

"I have had the pleasure of working with Lois Phillips on a variety of organizational development projects over the last 15 years and can highly recommend her as a consultant in any of the areas of planning, coaching or presentation

As a new executive director, the preparation phase of the process with Lois was crucial in ensuring that I achieved my goals at the (staff) retreat. She helped me to develop an agenda, discussion strategies and feedback instruments to assure that all staff members were engaged in lively and substantive discussions. This was particularly remarkable in that the entire process was achieved in less than 6 weeks and the entire "work time" of the retreat was only 5 ½ hours."

*Cynthia Bowers, M.D.,  
Executive Director  
Santa Barbara Neighborhood Clinics*

"Lois Phillips, Ph.D. provided professional facilitation services to ADHMS for a countywide mental health services community planning project (working) with our project team to develop a strategy for receiving community and stakeholder input and to create an agenda for a 150-participant (3 day, countywide) Stakeholder Summit Meeting. (She coordinated the work of small group facilitators, obtained agreements that were needed to develop a funding proposal for submission to the State Department of Mental Health.

Our department was very fortunate to have her expertise in planning this event. I was particularly impressed with Dr. Phillips ability to maintain enthusiasm and commitment to the project, positively influencing the rest of the team."

*James L. Broderick, Ph.D.  
Alcohol, Drug & Mental Health  
Services Director*

This is to recommend the consulting and meeting facilitation services of Lois Phillips. MENDA has hired her over the past two years to plan and implement an annual meeting with managers and executives prior to developing the strategic goals for the year. She has facilitated the retreat to my complete satisfaction. Although she kept us focused on substantive discussions, the environment she created was warm and informal. The event helped us to focus on actions we must take to retain our competitive position and expand business further into international markets. Lois conducted an anonymous survey prior to the retreat (and developed a) risk resolution exercise, which was designed specifically for our company. Lois is very client-centered in her approach to planning and validating meetings (with suggestions that ensure) I address any emerging issues. She is a lively and dynamic communicator and I would highly recommend her services.

*Andrea Rifkin,  
President MENDA CORP.*

### **Program Development**

My personal thanks go to you for all your efforts, which resulted in such a successful Youth Enrichment Adventure program at UCSB. I can only begin to imagine all the hard work you put into it.

*Marilyn Gevirtz,  
Philanthropist/Funder  
Gevirtz Research Center, UCSB*

Re: Youth Enrichment Adventure Program at UCSB, Gevirtz Research Center:

What a glorious month for young and old. You did a wonderful job putting this all together. Lois—all your hard work was worth it. We loved meeting you and we look forward to next summer!

*Marcia and Jamie Constance  
Philanthropists, Elings Park  
Foundation*

## **For More Information:**

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**Lois Phillips, Ph.D.**

