Insight Strategies, Inc.
Cultivating greatness in organizations and people...your trusted counsel.

About

Insight Strategies, Inc. (Insight) is a management consulting and training company based in Torrance, CA with a satellite office in New Orleans, LA. Insight has provided consulting, coaching, training, facilitating and speaking to an influential list of American, multi-national and international organizations since 1994.

Insight Strategies is certified as both a DBE and an SBE and is veteran owned.

Insight is best known for being outcomes-based and for establishing trust quickly and gaining buy-in to initiatives with groups and individuals. Aside from the ability to impact strategies, processes, skills and behaviors and get teams to excel collaboratively, Insight understands the nuances of “moving” individuals, teams and the organization toward their vision. Building relationships and creating momentum is as important as Insight’s technical capabilities.

With over 20 years’ experience consulting with executives and organizations, Insight has crafted a model of organizational effectiveness that has proven success. Organizations perform at their best when organizational strategies, direction, objectives and goals are clear and aligned; when processes are employed to drive effectiveness, accountabilities and strategies; and when the right people are in the right positions to execute on its mission and stated goals. Ensuring these three components are maximized and aligned, result in optimization of strategic intention.

The first step in creating alignment in an organization’s strategies, processes and people is through successful facilitation of productive conversation among key decision makers. Insight prides itself on its breadth of experience in bringing together seemingly fractious groups.
Insight Strategies (Partial) Transit Client List

Insight Strategies Non-Transit Clients (Partial Listing)

What differentiates Insight Strategies?
- Insight’s experience within and outside of the transit industry allows for an “inside” understanding and as important, an appreciation for strategies and best practices outside of the industry
- Insight is outcomes-based; with a complement of both staff and line experience, Insight understands the importance of metrics (quantitative and qualitative)
- Insight is nimble, agile and employs a collaborative style, building on the mind trust of our clients
- Insight understands the importance of and is skilled at enrolling key influencers and stakeholders as a means to creating buy-in, momentum and traction
Insight Strategies will **Consult, Coach, Train, Facilitate and Speak** on any of the following topics:

- Talent Management
- Succession Planning
- Strategic Thinking & Planning
- Leadership Effectiveness
- Team Alignment & Effectiveness
- Sales Team / Sales Management
- Process Improvement
- Process Mapping
- Curriculum Design & Development
- Change Management
- Persuasion and Influence
- Team Effectiveness
- Generational Differences
- Ethics & Compliance
- Presentation Skills
- Diversity
- Motivation
- Managing Up
- Gender Differences
- Delegation
- Negotiation Skills
- Communication Skills
- Performance Management
- Accountability
- Time Management
- Conflict Resolution
- Customer Service
- Emotional Intelligence
- Business Development
- Client Relations
- Transitioning to Management
- Culture Change

Insight also *insists* on measuring its efficacy throughout the entire engagement. After all, Insight’s clients have measurements they are judged by, they have a right to expect that Insight does so as well.
Client Testimonials

Jenny Larios, Chairman of the Board WTS-OC
“On behalf of the WTS-OC board of directors thank you so much for your amazing leadership and skillful guidance today! Your strategic planning workshop has really helped reset our minds and we look forward to an even more amazing year as we grow our chapter and serve women in transportation.”

May Low, CPSM, Marketing Manager, Aecom
“Thanks (Insight Strategies) for such a wonderful session. The skills I learned today benefited me as board member in WTS and as a manager in my work place.”

Alex Bond, AICP, Director, Center for Transportation Leadership, Eno Center for Transportation
“Insight Strategies has transformed the Eno Center for Transportation’s transit mid-manager program and positioned it for growth in the coming years. Insight focuses on developing concrete skills, which allows our students to have an immediate impact on their home organizations. Building leaders—versus just managers—lies at the heart of the Insight team’s philosophy. I highly recommend the Insight Strategies team for any training or strategic management projects in the transit industry.”

Jill Israel, SVP, Entergy
“The group unanimously felt you hit the mark exactly for what they needed. I know we condensed quite a bit, but they felt the two days were well worth it and not too rushed. They particularly found great value learning this material as a Black Belt group and that you did a great job “flexing” the agenda to their needs... Thanks for helping make our first company-wide Black Belt session a success!”

Paul Taylor – DCEO, Los Angeles County Metropolitan Transportation Authority
“LACMTA and LASD have been attempting to unify two parts of our organization under a single, new structure in order to be more efficient and customer-focused. It is crucial that the two units collaborate and communicate in ways they have never done. Insight pursued deliberate strategies to orient everyone in the two units toward a single mission and a set of readily-achievable goals. The performance (and the morale) of the two units is better than it has ever been thanks to the Insight-led efforts.”

Kenneth McDonald – President and CEO of Long Beach Transit (LBT):
“Thanks for taking the time to share your thoughts with us. You have been really instrumental in our journey and our accomplishment in performance management at LBT. You have truly assisted me to accomplish my goals as the leader of the organization. Thank you.”

Edward F. King, Director of Transit Services, Santa Monica Big Blue Bus
“I am writing to provide a testimonial to the work Insight Strategies completed for the Southern California Regional Transit Training Consortium (SCRTTC) in 2013 on the organization’s strategic plan. During the process (Insight Strategies) did a great job facilitating the strategic planning process, engaging the board, summarizing and bringing back comprehensive feedback, and then formulated documents reflective of discussion and themes from our meetings. I would recommend Insight Strategies as a consultant for developing a strategic planning process/document or training for an organization.”
Insight Strategies’ Case Study: Los Angeles County Metropolitan Transportation Authority (LACMTA)

**COO Strategy Support**

**Description of Work:** Provided strategy and leadership support for the COO (John Catoe then Carolyn Flowers) and the Sector Managers. Facilitated numerous sessions with respect to strategy and KPI development, performance management development, 360 assessments, 1:1 coaching as needed and Sector/Divisional support upon request.

**Sector Management & Governance Council (Sector Board) Alignment**

**Description of Work:** In 2004 the LACMTA had a major reorganization that decentralized all operations into five regional sector Offices. Sector Governance Councils (sector Boards) were established as a means to govern and serve local needs of each sector. Insight was asked to facilitate Management & Governance Council retreats to establish their respective missions, strategic goals, roles, and overall alignment between management and the Governance Councils. This concept was considered as being a “startup” in nature and required considerable planning and follow through. Over ten years later, the Sector Governance Councils are still in place and considered a success! Components of the retreat included the following:

Insight performed the following activities

- Met with key personnel from the Sector to clarify purpose, goals and desired outcomes for the retreat
- Read through and studied the by-laws for understanding
- Attended the Sector Governance Council meetings to observe the interactions and group dynamics and become familiar with the key members
- Interviewed Governance Council members to understand their goals, motivations, perspective, and to establish relationship and trust prior to the retreat
- Produced a report summarizing the interview findings and conclusions drawn
- Developed a game plan, in collaboration with key leaders, to maximize the accomplishments and results for the retreat
- Facilitated the workshop on June 18, 2004
- Developed a final report that included a synopsis of the workshop results and recommended next steps with regard to: 1) the FY05 work plan, 2) maximizing the effectiveness of the Governance Council, and 3) improving the relationship between the Sector management team, the Governance Council and the LACMTA
- Debriefed Sector Management and other key leaders on the final report

**LACMTA Security (employees) and the Los Angeles Sheriff’s Department (Contracted--LASD)**

**Description of Work:** Top Down Consulting on 1) Cross Functional Team Building & Alignment, 2) Leadership Development 3) Organizational Communication, 4) Strategy Development, 5) Culture Change and Organizational Transformation, 6) 1:1 Executive Coaching
Tasked by the DCEO of LACMTA, Insight worked for a year and a half with key leadership of both Metro and the LASD to align and unify their efforts in a matrixed structure with an eye towards Security excellence. The effort involved a series of meetings and training sessions, top down from Commander to the rank and file. Insight created a survey to measure morale, team effectiveness, leadership effectiveness and alignment. The survey results informed the process and shaped the content of the team alignment sessions which focused on mission and goal development, effective communication, trust building, conflict resolution, process improvement and branding and marketing of the combined (Metro & LASD) Security Team moving forward. A collective team, newly named LAMPS (Los Angeles Metro Protective Services) was created.

As a complement to this effort, a communication and branding campaign was created that was intended to create buy-in to the new LAMPS initiatives. The communication campaign targeted internal customers and external partners such as the Board, the unions, LAPD and customers.

**Quote from Paul Taylor, (former) DCEO**

“LACMTA and LASD have been attempting to unify two parts of our organization under a single, new structure in order to be more efficient and customer-focused. It is crucial that the two units collaborate and communicate in ways they have never done. Insight pursued deliberate strategies to orient everyone in the two units toward a single mission and a set of readily-achievable goals. The performance (and the morale) of the two units is better than it has ever been thanks to Insight’s efforts.”

**Insight Strategies’ Case Study: Southern California Regional Transit Training Consortium (SCRTTC)**

**Description of work:** After seven years since the SCRTTC’s inception, the Board decided to embark on a 5 year strategic plan and asked Insight to facilitate and lead the Board through this effort. As a primer to developing the strategic plan, Insight met with both the Board and Member base to conduct an in-depth needs assessment and SWOT analysis, focusing on its training programs and organizational effectiveness, as a whole.

**Process:**

**Phase 1**—Insight reviewed internal documents; conducted SWOT analysis sessions, focus groups and interviews; and developed and administered online surveys. Online surveys were administered to both current end-users of the SCRTTC offerings as well as those that are non-users. By soliciting feedback and ideas from internal and external sources, valuable insights were attained regarding increasing the usage of the consortium and training needs were identified.
Current state:
- Growing pains
- Loss of direction
- Expansion outside of SC—crossroads
- Funding inconsistent
- Funding source dictates training offering
- Board meetings not consistently attended
- Leadership succession in flux
- “Adolescent” phase in Life Cycle
- Underutilization of the SCRTTC offerings by members/non-members, i.e. 70% of all SCRTTC training hours were comprised of only six agencies.
- Training effectiveness currently measured by “smile sheets”—Kirkpatrick Level 1
- Need for deliberate future course and plan with updated training offerings

Phase 2—Facilitated and developed a 5 year Strategic Plan that integrated Phase 1 findings.

Quote from Rolando Cruz, Vice President and COO of the SCRTTC
“Over the past year, the SCRTTC has worked with Insight Strategies and team, to develop its first ever 5 Year Strategic Plan. An important part of the process was to assess the SCRTTC’s current state, relative to its training programs and organizational effectiveness, as a whole. Teri conducted a SWOT Analysis and Needs Assessment that illuminated the necessary changes in the consortium’s course offerings, approaches, curriculum, instructor quality, and how it measures training effectiveness. The assessment also uncovered gaps in perception between the Board and the SCRTTC’s member base, as well as training usage by users and non-users of the Consortium’s services. Through these assessments the SCRTTC was able to develop strategies to address the issues and opportunities and incorporate them into the Strategic Plan. I personally want to thank Teri and her team for their tenacity, dedication, expertise and collaboration on this important effort. It was a joy working with you all.”

Insight Strategies’ Case Study: California Transit Association

Description of Work: Insight Strategies was asked to facilitate the Strategic Planning portion of CTA’s annual Leadership Summit in which the Board and CTA management gather to re-align and prepare for the coming year. Prior to the session, Insight conducted interviews with each of the Board members and Managers in order ascertain what successes and points of needed improvement were most important to discuss during the session. Over the course of the full day session the group accomplished the following:
- Understanding the differences and values of strategic thinking and tactical thinking
- Discussed and established the main focus areas for the session
- Reviewed and discussed the interview findings
- Unveiled and established top-line expectations and priorities based on consensus
Insight Strategies’ Case Study: Women in Transportation Seminar – Orange County Chapter (WTS-OC)

**Description of Work:** Insight Strategies was contacted to facilitate WTS’s annual Board meeting with the goal of establishing:

- An advocacy plan for 2015
- An approach/policy for potential new Board members
- A plan for educating the public

To that end, Insight crafted pre-session questions for each Board member and Advisory Board member to complete prior to meeting to help establish the outline and direction of the session. Over the course of the session the group accomplished the following:

- Discussed and established the overall vision for WTS-OC as an organization
- Discussed the impact of transit, workplace and funding trends and how they affect the organization
- Conducted a SWOT Analysis
- Established WTS-OC Strategic Priorities for 2015
- Introduced, determined and developed WTS-OC’S SMART Goals for 2015

**Quote from Jenny Larios, Executive Director – Mobility 21**

"On behalf of the WTS-OC board of directors thank you so much for your amazing leadership and skillful guidance today! Your strategic planning workshop has really helped reset our minds and we look forward to an even more amazing year as we grow our chapter and serve women in transportation.”
Senior consulting team.

Teri Fisher, CEO and Managing Partner

Acclaimed consultant, trainer, executive coach, author and speaker, Teri Fisher is known for integrating theory, expertise and real world business practices to her engagements. Ms. Fisher’s approach is collaborative and results oriented earning her the status of trusted counsel with a multitude of organizations.

Ms. Fisher is recognized in the areas of Strategic Initiatives, Leadership & Influence, Organizational Communications, Talent Management, Succession Planning & Messaging, Interpersonal Communications, Sales, Team Performance & Alignment, Performance Management, Mediation/Conflict Resolution.

Since forming Insight Strategies, Ms. Fisher has provided professional services to organizations such as: Sun Microsystems, Entergy, Citifinancial, Microsoft, the Central Intelligence Agency (CIA), United Online, Washington Metropolitan Area Transit Authority. In addition, Ms. Fisher served as part of the Adjunct Faculty with Sun Microsystems for their worldwide leadership initiatives.

Ms. Fisher has been published in the Financial Times, ft.com and the Wall Street Journal’s, career.com specifically directed toward corporate executives. Ms. Fisher was a contributing author along with Stephen Covey and Ken Blanchard for a book entitled, Blueprint for Success.

Kevin Catlin, Managing Partner

Kevin’s expertise is in Leadership and Managerial Skills Development through consulting, coaching and training. His training and coaching methods are distinctive and bring together the art and science of performance enhancement. Kevin excels at working with individuals as well as all sides of an organization from executive levels to frontline employees.

Kevin has 15 years of experience consulting and training with transit agencies through Insight Strategies. He has broad experience—from serving our country in the United States Army to strategic consulting for Fortune 100 companies. Kevin has owned four different businesses and holds over 30 years of executive experience. Kevin's depth of experience and the ability to turn that experience into practicable learning is a key factor in his success.

Kevin is well known for his powerful, inspirational and sometimes humorous approach to complex problems. He delivers graduate school lectures to the University of Southern California (USC) and University of California, Los Angeles (UCLA) and has appeared on radio and television to discuss motivation and business coaching.
Carita Ducre, Senior Consultant

Carita is an expert in the areas of Business Writing, Ethics & Compliance, Written and Verbal Communication Skills, Sales, Customer Service, and e-Learning Instructional Design. She has owned a small-business and, therefore, understands the challenges of leading and managing a successful workforce.

Prior to joining Insight Strategies, Carita was a communication and training expert for a major utility company. In that capacity she wrote and designed e-Learning courses, delivered classroom training, led a project to refresh the company’s Code of Conduct, and wrote more than 250 business-related communications, including writing for the C-suite.

An experienced facilitator, Carita knows how to cater to adult learning styles. Her classrooms—whether in person or online—are fun, interactive and engaging.

With Insight Strategies, she has provided professional services to Santa Monica’s Big Blue Bus, MV Transportation, Clean Energy, CAbi, and the Eno Center for Transportation.

Carita holds a Bachelor of Arts degree in English from the University of Notre Dame and an e-Learning Instructional Design certificate from the American Society for Training & Development (ASTD). She also completed the Ethics 101 course from the Ethics and Compliance Officer’s Association (ECOA).