

StageSHIFT Leadership Coaching in Vertical Development

Expediting:

Visionary

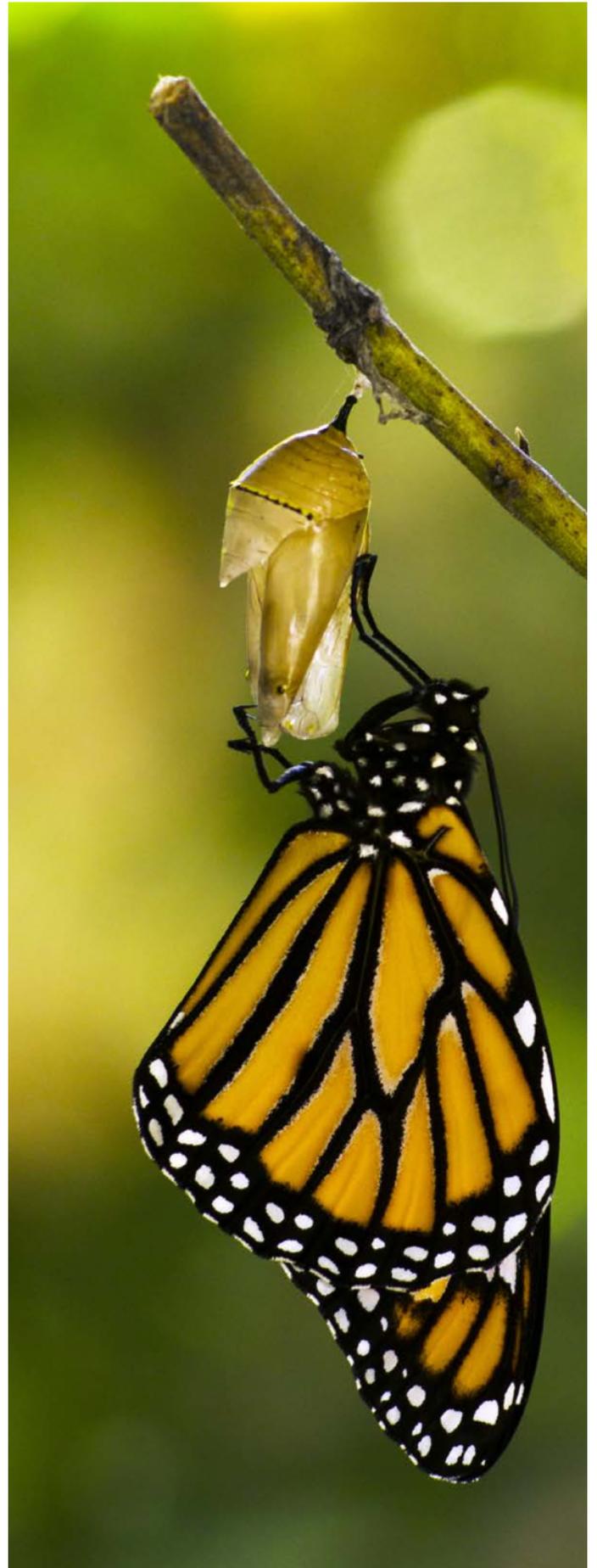
Inspiring

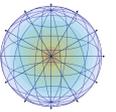
Transformative

Aspirational

Leadership

@ Synergist





WELCOME

Thank you for your interest in StageSHIFT. Vertical Development is one of the fastest growing trends in leadership development today and it is even more critical and urgent during this era of disruption.

Shifting to the later stage of Synergist makes a significant difference to a leader's personal presence, transformative power and life experience, and the capacity of an organisation to evolve and transform.

This document outlines the nature of Vertical Development and the proven efficacy of the StageSHIFT fast track pathway. By lifting the lid off conventional ways of doing things, what used to take years can now be realised in a matter of months.

Enjoy!

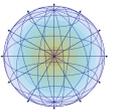
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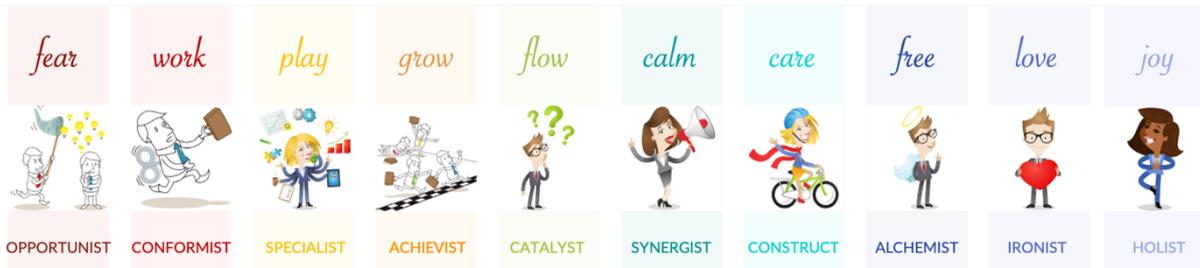
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1. Vertical Development to Synergist⁺

The Vertical Stages of Development ...from work to play, grow to flow, calm to care and free to love with joy.



Vertical learning involves expanding our level of conscious awareness. We need to go higher, deeper and broader to develop the 20/20 vision to see more dynamic subtlety and systemic complexity. This involves

1. Realising that the clutter in one's mind and emotional reactive patterns give us the perfect guidance to our subconscious so we can integrate the holistic self and gain an open, calm and peaceful mind and a warm and compassionate heart, guided by our luminescent spirit.
2. Leading others in ways that respect their evolutionary process, embrace their uniqueness and offer them the opportunity to contribute their strengths and talents in purposeful, meaningful ways while exploring interpersonal psychodynamics to resolve issues and heal emotions.
3. Setting strategic direction in the organisation and community to work with disruption, see the source of systemic patterns and thereby create a more sustainable, healthy and equitable world that is built on more solid economic, social and environmental foundations.

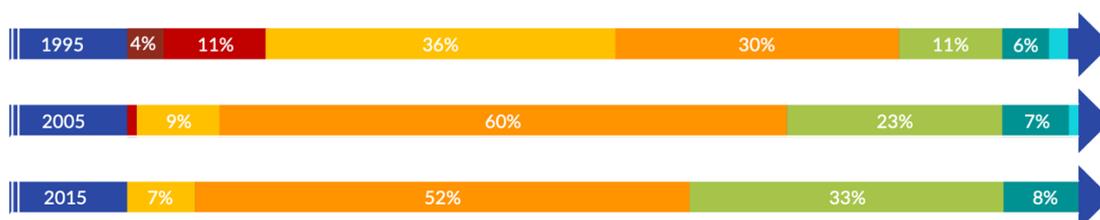
The real voyage of discovery consists not in seeking new lands but seeing with new eyes. Proust

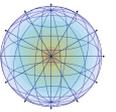
We Need Synergists to Lead Transformation

Executives at later stages are more effective leaders. Achievists focus on 3-5-year plans and make trade-offs to achieve short-term results. They have Vision but are not visionary. Catalysts can lead engagement, appreciate diversity and become authentic in alignment with their Values but they are not yet values-led.

Only at **Synergist** do leaders develop their Voice with integrity. They are able to transcend the turmoil and cut through complexity, trust emergence and navigate uncertainty, and transform their self and their world with strategic ingenuity. Synergists are visionary, inspiring, transformative, aspirational leaders.

While **Achievists** still predominate, the proportion of **Catalysts** has been increasing at the rate of 11% in each of the last two decades (PwC Report, 2015). However, the development of **Synergists** is stalled at 1% per decade. Current leadership development programs are not producing leaders at this mature stage.





METAWARE

SUBTLE

CONCRETE

TRANSPERSONAL

POST-CONVENTIONAL

CONVENTIONAL

joy



Holist
'inspires all'

Infinity and eternity
Emptiness and fullness
Lightness, timeless, boundless
Oneness, formless, emptiness
Fullness of love experience
Luminous self as spirit

Ironist
'generates love'

Fullness of compassion
Perceives passing of ages
Timely world-centric action
Sees impact of butterfly wings
Cosmic perspective
Surrenders the self



love

free



Alchemist
'evolves society'

Life is a theatre
Empty open mind
Integrates material and spiritual
Sees repeating eternal patterns
Order and mess are okay
Social transformation

Constructivist
'frames reality'

Disrupts the status quo
Takes reverent care of life
Constructs reality with thought
Sees own projections instantly
Perceives eras of civilisation
Collective shadow arises



care

calm



Synergist
'leads transformation'

Sustainable change
Mutual collaboration
Orchestrated and systemic
Vigilant and vulnerable
Purposeful fulfilment
Sets trust as default

Catalyst
'is authentic'

Life is a journey
Reflective and insightful
Collaborative change agent
Interweaves across stakeholders
Generates unique perspectives
Follows intuition over logic



flow

grow



Achievist
'gets results'

Sets and juggles priorities
Positive, pragmatic planner
Life is about striving and winning
Wants "More" and always "Busy"
Proactively achieves team goals
Feedback fosters better results

Specialist
'develops skills'

Life is a major effort
Logic and expertise prevail
Quality continuous improvement
Highly critical and perfectionist
Always "Not good enough"
Takes feedback personally



play

work



Conformist
'by the rules'

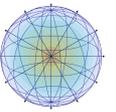
Life is a struggle
Right and wrong
Enjoys belonging
Follows directives
"Us" and "them"
Takes zero-risk

Opportunist
'on the take'

Life is threatening
Acts in self-interest
Steals ideas, blames others
Closed to feedback
Sees opportunities
Attacks to defend



fear



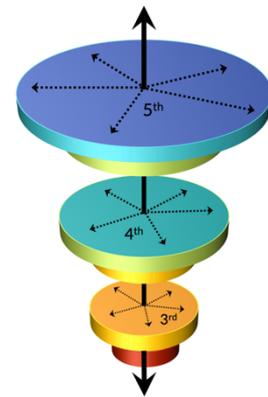
The Spectrum of Stages

Everyone has a range of stages in their profile, generally four:

1. A leading edge
2. A primary stage
3. A secondary stage
4. A trailing edge

All four shift in their role in a person's inner operating system, their identity, as they navigate their conscious evolution.

The stages form couplets at progressive person perspectives. Each individuation stage is followed by an integration stage e.g. the stage of Catalyst integrates at Synergist to reflect the transformation to the 4th person perspective from "me" to "we". The individuation stage reflects inner development and the integration stage reflects outer manifestation. Thus, every second stage represents a transformation of perspective.



3 Sequential Person Perspectives
Adapted from Cook-Greuter, 1995

The Centre of Gravity (CoG)

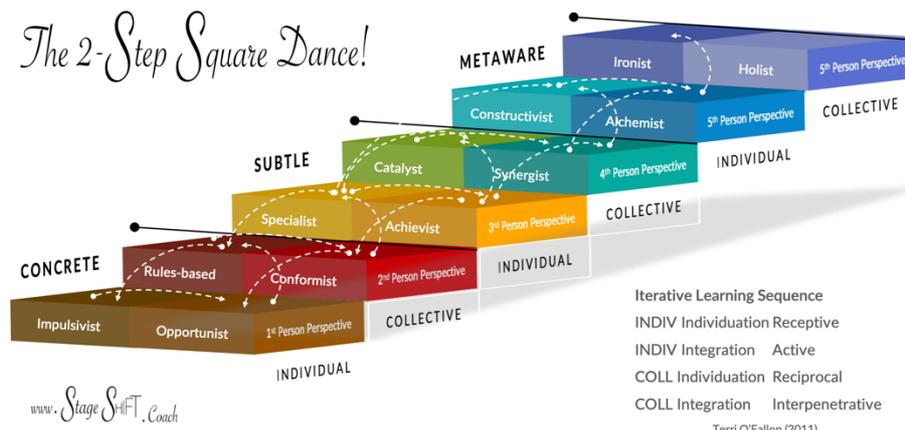
In our experience, a person's Centre of Gravity (CoG) lies at their latest stage of integration i.e. Achievist or Synergist. It is only then that their previous integrated stage releases its influence. Therefore, while there is an increasing proportion of Catalysts amongst executives, they still have their Centre of Gravity at Achievist. This is particularly true during disruptive times when they naturally default to what is most familiar to them, their autopilot. Therefore, the double shift to Synergist is essential to transcend the turmoil, trust emergence and transform self and their organisation.

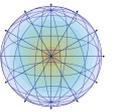
The Individual and Collective

Most interestingly, O'Fallon's (2011) breakthrough research adds another dimension to vertical leadership development. A typical four-stage spectrum includes an Individual and a Collective perspective.

For instance, a person with their Centre of Gravity (CoG) at the 3rd person Individual perspective of Achievist, includes the 2nd person Collective perspective of Conformist. Their individuality is in the foreground and the collective organisational context is in the background. In other words, they know the game and even how to break the rules to play to win on an individual competitive basis.

The shift to developing a CoG at the 4th person Collective perspective of Synergist, includes the 3rd person Individual perspective of Achievist, and at Synergist⁺, the 5th person perspective at Alchemist. The shift to Synergist thus requires the transformation of the conventional organisational context to manifest their own self transformation. Thus, we have the 2-Step Square Dance of stage transformation!





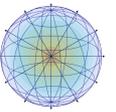
2. Transformative Executive Coaching

Developmental coaching and Authentic Leadership Programs can take people to the stage following the predominant stage of Achievist, to Catalyst. However, they do not incorporate these five key elements that distinguish the transformative nature of StageSHIFT Coaching.

1. The transformative coaching approach with a later stage executive coach who engages in a mutual discovery dialogue sharing their insights and guidance to expand clients' awareness.
2. The higher aspirational intent articulated with purpose and conviction to actualise personal potential and genuinely aspire to create a more sustainable, healthy and equitable world.
3. The deeper shadow resolution and psychodynamic awareness required to eliminate, not just regulate, emotional triggers, transference and reactive patterns in relationship dynamics.
4. The evolutionary organisational frameworks and processes that liberate everyone from conventional modes of operating that contain and curtail natural organic human growth.
5. The assertive and inspiring techniques and tools to express courageous authenticity with ease and grace, and embrace conflict with caring inquiry and proactive orchestrated collaboration.

COACHING TYPOLOGY	SKILLS-BASED COACHING	PERFORMANCE COACHING	DEVELOPMENTAL COACHING	TRANSFORMATIVE COACHING
Coach as ...	INSTRUCTOR	MOTIVATOR	FACILITATOR	COLLABORATOR
Coaching Paradigm	Informed, Practice makes Perfect!	Positive Psychology Process Centric	Humanistic Inquiry Person Centric	Holistic Emergence Systemic Synergy
Primary Success Factor	Ability to Teach & Learn	Clarity of Agreed Goals	The Coaching Relationship	Mutual Meaning-Making
Coaching Relationship	Transactional Transfer	Mutual Accountability	Professional Trust	Dialogic Partnership
Coaching Models & Techniques	Rehearsal & Feedback	Cognitive Behavioural	Narrative Story Ontological	Psychodynamics Complex Systems
Typical Duration of Session/Program	30-60 Mins 3-12 Weeks	30-60 Minutes 3-6 Months	60-90 Minutes 6-12 Months	90-120 Minutes 12-24 Months
Leadership Outcomes	Thought Leadership Best Practice	Transformational Agile Leadership	Authentic Adaptive Leadership	Quantum Eco-centric Leadership
Stage Outcome	SPECIALIST	ACHIEVER	CATALYST	SYNERGIST

Transformative Coaching is a 3rd generation approach (Stelter, 2014) beyond developmental coaching. The perspective and presence of a later stage executive coach at Synergist⁺ is able to hold a sacred space of mutual trust, inquiry and meaning-making that generates emergence, insight and revelation. This quickens the evolutionary journey for clients as they rapidly expand their minds and hearts to experiment with deeper and richer interpretations of life experiences to realise aspirational intent.



3. Proven Evidence-based Fast Track

The Pace of Development

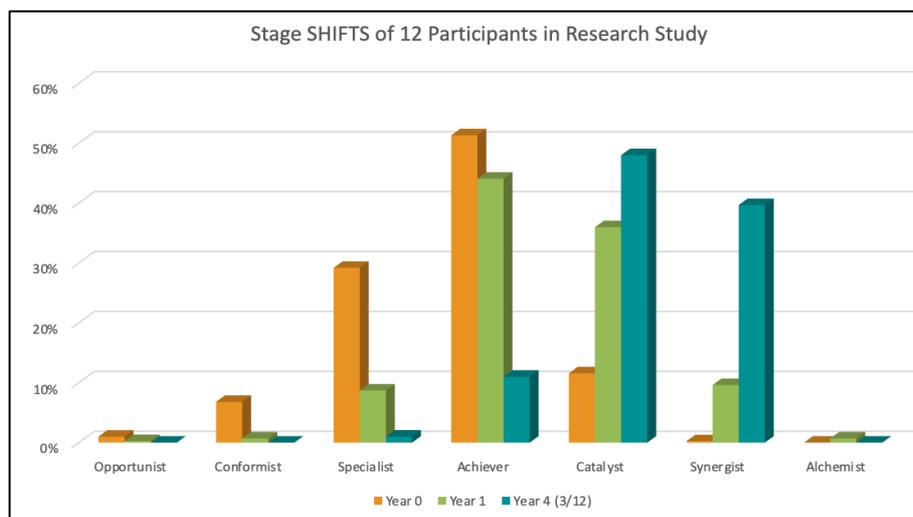
The StageSHIFT in vertical leadership development was thought to take five years of conscious evolution. By exception, Rooke & Torbert (2005) advised that they have only observed 3 people shift a stage each year over 3 years in their decades of experience in vertical development with leaders and organisations. However, just over a quarter of leaders at Achievist and Catalyst attending an enhanced 25-day 9-month Community Leadership Program in Australia including psychosocial challenges, shifted to the next stage of development (Vincent, 2015). And, at 20-day Pacific Integral Retreats renowned for their transpersonal development, many shift 1-2 stages over 1-2 years (Brown, 2014).

The conclusion is that it can take just one year, not five, to shift a stage, depending on the program.

The Place of Development

In conventional coaching circles, there has also been a reticence to expedite vertical development for fear of causing discombobulation. Leadership development programs have also been slow to adopt vertical development as a measure of the effectiveness of their programs at the risk of falling short.

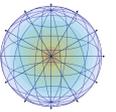
However, given the urgent and critical need for more leaders at Synergist, StageSHIFT Executive Coaching focuses explicitly on later stage development to Synergist⁺. By Synergist⁺ we infer that it is not sufficient to have one's primary stage at Synergist, but to anchor one's Centre of Gravity here. Only then does a person fully embody the mature leadership capacity at Synergist.



In our research study to inquire into the effectiveness of StageSHIFT Coaching, we discovered that:

1. An average of 8 * 90-min Coaching Sessions enabled a universal stage shift in one year
2. 80% of the participants shifted one stage, most to Catalyst; 20% shifted twice to Synergist
3. Participants assessed three years later had all shifted their Centre of Gravity to Synergist
4. Their average aggregate profile at Catalyst/Strategist inverted from 12% to 88%.

2 Days over 12-months of StageSHIFT Coaching is 4 times more effective than most typical 20-day Leadership Programs in just 10% of the time



The Drivers of Development

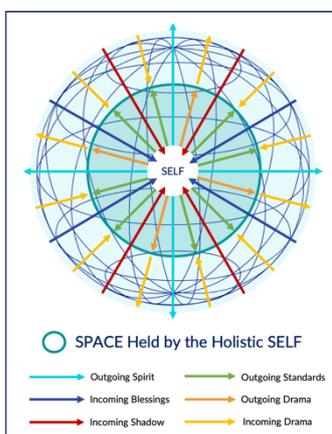
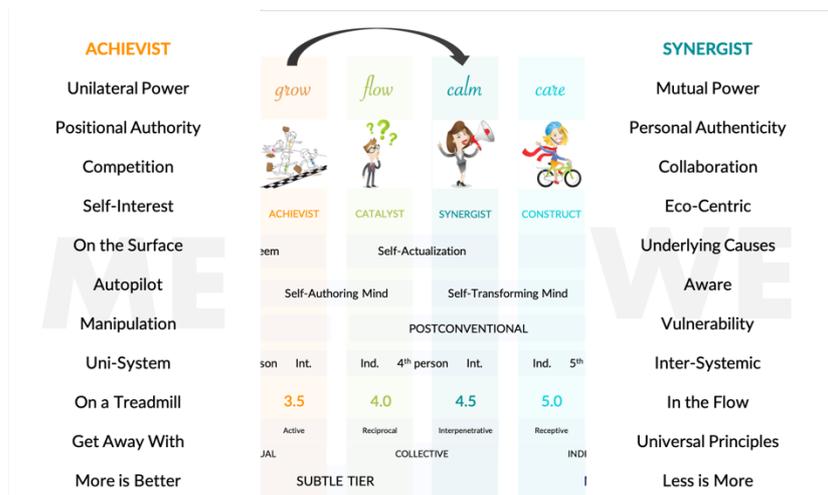
An extraordinary thematic analysis of over 100,000 words taken from 100 coaching hours revealed a joint focus on evolving the organisation and cultivating personal identity, strategic and holistic leadership development. Further, the coaching interventions attended to exploring the person's inner world to deepen awareness, set aspirations and heal shadow, as well as their outer world of dynamic interactions, accountabilities and cultural norms.

The coachees learned to see from a 4th person interpenetrative perspective where self-expression interpenetrates our life experience. They also gained the knowhow to approach their leadership role in more accountable, collaborative and empowering ways.

SELF	INTENTION	INTERACTION	ALL
COLLECTIVE	1. Shared Purposeful Strategic Direction	2. Distribute Time to Orchestrate Flow	STRATEGIC
	7. A Unique Signature Living Presentation	8. Collaborate Widely to Generate Synergy	
INDIVIDUAL	3. Set Evolutionary Personal Aspirations	4. Positive Kindness and Open Mindfulness	HOLISTIC
	5. Release Shadow Psychodynamics	6. Hold Courageous Caring Conversations	
INTEGRATION			

These eight drivers of development form the core of the StageSHIFT Synergist Leadership Program. Four relate to holistic transformation of the self and four to the strategic transformation of the organisation. Four draw from their inner identity and four relate to their interaction with others.

The swift Stage Shift outcomes are due to the comprehensive content, aspirational intent, shadow resolution, organisational evolution and the transformative dialogic coaching approach of enriched meaning-making.

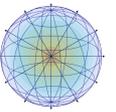


The Dynamics of Development

The dynamics of development emerged by studying the impact of these drivers. In applying new techniques and exercising courageous authenticity and vulnerability, the leaders were able to hold psychologically-safe protected space for others in their organisations. This distinguished the highest performing teams from others in Google.

By expanding the strategic leader's role as being responsible for sustaining this respectful space rather than it being a box in an org chart, their presence expanded outward into the organisation. The Synergist's integration of positional authority with personal authenticity and purposeful aspiration, led to their rising integrity, influence and impact.

Life doesn't just happen to us, life happens through us, as us.



5. Holistic Personal Evolution

StageSHIFT Coaching enables Personal Holistic Evolution

The holistic evolutionary journey is unique to StageSHIFT Coaching.

It involves the progressive emergence of human faculties and the relationship of self-expression at each integrated stage with our consequent life experience. As we evolve, we integrate the whole self.

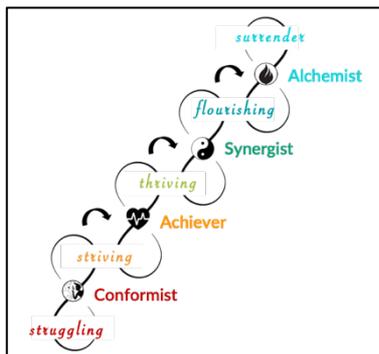
Human Faculties of Self-Expression

Each stage is associated with a human faculty. You will note that the individuation stages in italics relate to human faculties that have a quality of movement i.e. habits, will, intuition, guidance and illumination, while the integration stages have a stronger holding orientation i.e. impulse, ego, heart, mind, spirit and soul.

In the shift from Achievist to Synergist, we open our hearts to heal shadow, follow our intuition to navigate emergence, clear our minds to transcend turmoil, and embody guidance to realise our aspirations.



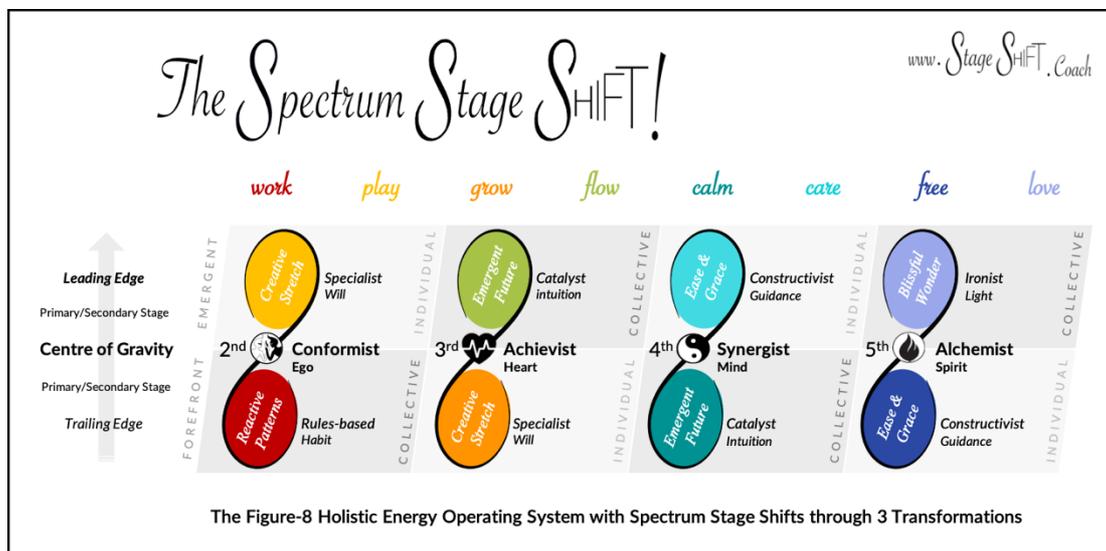
The Energy Fields of our Life Experience

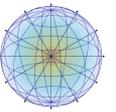


Our life experience reflects our Centre of Gravity (CoG). When anchored in the Ego at Conformist, much of our life experience is composed of struggling with Reactive Patterns from the past and striving with Creative Stretch into the future. When our CoG is at Achievist, our life experience is largely made up of striving and thriving in the Emergent Future which is the present.

When our CoG is at Synergist, our life experience combines thriving and flourishing with Ease and Grace in the moment. And the following evolutionary shift to Alchemist transforms our life experience to one of flourishing and surrender in Blissful Wonder.

The Figure-8 Holistic Energy Operating System





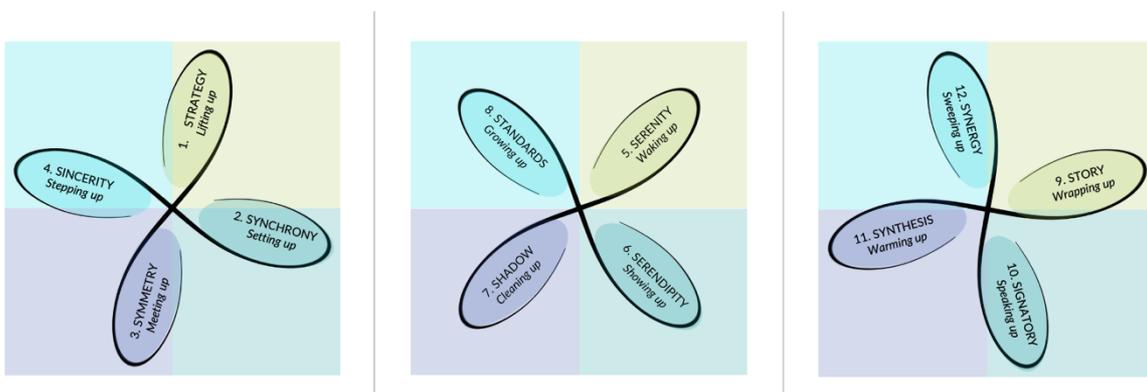
6. StageSHIFT Leadership Programs

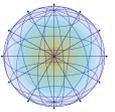
The StageSHIFT Coaching Programs integrate:

1. The four quadrants of AQAL Integral Theory (in the centre)
2. The eight drivers of development to Synergist⁺ (in each quadrant)
3. Strategic collective and holistic individual evolution (in the circle)



These 12 aspects that expedite the shift to Synergist Leadership interact to generate the conscious transformative forcefield of energy for speedy inner and outer transformation of leaders and organisation.





StageSHIFT Leadership Programs

The 12-month SYNERGIST Leadership Programs incorporate all four dimensions of Strategic, Holistic, Transforming and Inspiring Leadership.



STRATEGIC LEADERSHIP

1. Strategy
2. Symmetry
3. Synchrony

Org Evolution



HOLISTIC LEADERSHIP

4. Sincerity
5. Serenity
6. Serendipity

Personal Evolution



TRANSFORMING LEADERSHIP

7. Shadow
8. Standards
9. Story

Personal Healing



INSPIRING LEADERSHIP

10. Signatory
11. Synthesis
12. Synergy

Outer Expansion

StageSHIFT Program Delivery

The StageSHIFT Programs comprise

- Individual learning modules (set out above) with three-four elements within each including video, notes, articles, templates and frameworks
- Group coaching in terms of 90-min Discovery Dialogue Webinars held fortnightly online to support the application and implementation of the materials
- Membership of a custom online community to post insights, updates and revelations.

They can be enhanced to include

- The STAGES International Stage Assessments for Individuals and Groups (from 20 to 20,000)
- Strategic facilitation of workshops for the executive team to expedite the development of the empowering and liberating strategic frameworks
- Strategic facilitation of workshops for the group senior executives leading key strategic initiatives across boundaries and borders
- Strategic consulting on people processes e.g. Org Design, Talent Reviews & Recognition
- Individual executive coaching for C-suite and divisional strategic leaders to customise and expedite their development

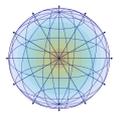
Other StageSHIFT Programs include:

- The Spectrum Stage Shift – Introductory Program
- The StageSHIFT Synergist Coaching Certification

StageSHIFT Program Outcomes

The StageSHIFT Promise is that by undertaking all four dimensions of the Program as an individual strategic leader, executive team, business division or whole of organisation, you will realise a quantum shift in leadership presence and effectiveness, people engagement & empowerment, organisational evolution and transformation, sustainable business performance and outstanding corporate reputation.

Organisations have shown a 20% increase in Leadership Effectiveness in one year, a 30% increase in People Engagement in 6 months, and a 100% increase in Business Revenues in just 3 weeks. Our sweet spot is organisations of 1,000 people and we have worked with companies numbering 50 to 10,000.

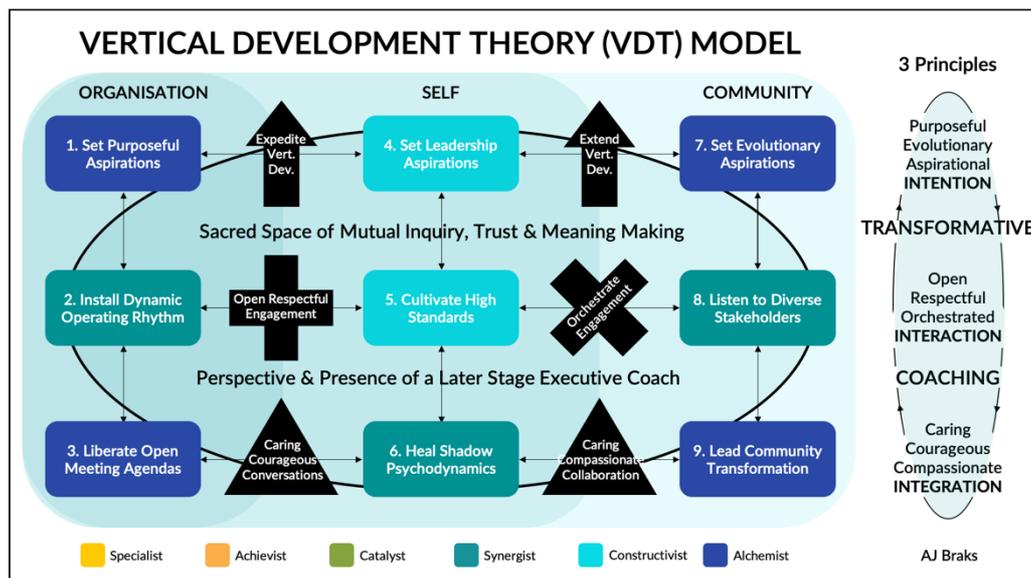


7. Vertical Development Theory

Vertical Development Theory is the culmination of StageSHIFT Research. It articulates the principles, drivers and dynamics of later stage development to Synergist.

In setting out the drivers and dynamics of development across Self, Organisation and the Community, it became apparent that three principles underpinned the extraordinary effectiveness of the program:

1. Purposeful Evolutionary Aspirational INTENTION
2. Open Respectful Orchestrated INTERACTION, &
3. Caring Courageous Collaborative INTEGRATION.

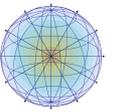


How Leadership Programs Inhibit Vertical Growth

1. They focus on authentic individual leadership but not transformative organisational leadership
2. They're held offsite in isolation from the workplace without an associated renewal of culture
3. They raise self-awareness but not the knowhow to put the newfound awareness into action
4. They recommend self-regulation but not shadow resolution to eliminate emotional triggers
5. They are taught by highly educated academics rather than later stage conscious leaders
6. They are inadequate to hold the psychologically safe and sacred space to disintegrate
7. They attend to leadership development goals but not purposeful aspirational intent
8. They customise the program with developmental but not transformative coaching.

StageSHIFT Leadership Programs offer the following distinctions:

- StageSHIFT Coaching is immediately implemented to transform the workplace
- StageSHIFT Coaching is continuously applied to evolve the self and the culture
- StageSHIFT Coaching has been proven to enable the shift to Synergist in one year
- StageSHIFT Coaching is undertaken by Synergist+ experienced Executive Coaches



8. StageSHIFT Executive Coaches



StageSHIFT Founder

Antoinette J Braks

PhD(c) Prof Cert Coaching Sup. MBA.LBS
MA LLB(Hons) BA Dip Intl Mktg(Hons)

Antoinette Braks is a Master Certified Leadership Coach, the Founder and CEO of StageSHIFT Coaching and author of Executive Coaching in Strategic Holistic Leadership, The Drivers and Dynamics of Vertical Development. She has pioneered an accelerated pathway in vertical leadership development to Synergist, the top 10% of leaders in terms of adult maturity, who can transcend the turmoil in today's world, trust emergence and transform their world with strategic ingenuity.

She was born in New Zealand of Dutch parents and has worked globally. After graduating LLB(Hons) with a BA in Political Science, she has completed a Dip Int Mktg (Hons), an MBA from London Business School, an MA in Management Research, a PhD in Developmental Coaching Psychology (MGSM) and an Advanced Diploma in Coaching Supervision with Oxford Brookes University.

**EXECUTIVE COACHING
IN STRATEGIC HOLISTIC
LEADERSHIP**
THE DRIVERS AND DYNAMICS
OF VERTICAL DEVELOPMENT

ANTOINETTE BRAKS



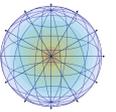
Antoinette has been dedicated to strategic leaders realising their potential and evolving their organisations throughout her career. She has led swift organisational transformations after building a global career leading People and Culture, designing and delivering leadership programs and coaching senior executives with Shell, Korn Ferry and Hudson. Leadership effectiveness has increased by 20% in 12 months; people engagement by 30% in 6 months, and business revenues have doubled for small enterprises 3 weeks following transformation.

Her executive coaching with strategic leaders has been even more remarkable. In a research study, 80% of clients shifted one stage in one year and 20% shifted twice to Synergist. These individual shifts were commonly thought to take 5 years. This 120% stage shift is four times more effective than most 20-day intensive leadership programs can attest to. Moreover, this transformation took place after just 8 coaching sessions (2 days) i.e. in 10% of the time invested. Given that Synergist leadership capacity has been growing at a snail's pace of 1%/decade in the last two decades, these outcomes are extraordinary.

Her corporate background includes C-suite leadership of People and Culture with Vector NZ during a significant merger integration, Director of Strategic Culture Transformation at Businesslink NSW Australia and Regional Strategic HR Management Latin America and Africa with Shell International. Antoinette led Leadership Capital Solutions for Korn Ferry Asia Pac and consulted with Hudson Talent.

As well as a Master Executive Coach, Antoinette is a strategic facilitator, leadership consultant, coaching supervisor and conference presenter. She presents at Coaching, Leadership and Integral Conferences to share her unique insights into the non-linear spiral nature of vertical leadership development to later stages e.g. the Spectrum Stage Shift, the 2-Step Square Dance and Vertical Development Theory.

All StageSHIFT Executive Coaches have significant coaching and corporate experience, have undertaken the StageSHIFT Coaching Certification Program, and have a Centre of Gravity at Synergist⁺.



9. StageSHIFT Testimonials

Antoinette's Program is unique. She is a collaborative intuitive whose depth of knowledge in leadership development is unsurpassed. In a short period of time she has galvanized the organisation in a way that is remarkable. She has clear insight into what drives different behaviours that are manifested in the workplace and how to make momentous changes in perspective. Her strong strategic focus, business acumen and gracious understanding of people mean that you will gain far more than you may expect. ~ Anne Cosgrove ED People & Culture at Family & Community Services

Antoinette was an engaging, skilful, intelligent, challenging and enthusiastic person to work with. She integrated many new initiatives to transform our culture creating momentum from which results soon flowed. The terrific speed of success was due to her great ability to engage with the leaders and ensure that the adopted strategies were well understood and effectively implemented to drive toward the desired outcomes. She was a vital source of energy and inspiration in setting our new course and getting us going! ~ Pat Richards, CEO Businesslink

Antoinette instigated a terrific collaboration with us by leading an invigorating two-day offsite to set our strategic direction. She led a values program around CONFIDENT Leaders that enabled the top 75 leaders to become more self-aware and develop the courageous authenticity and team accountability we needed to lift our performance. Her broad strategic perspective and deep insights into mindfulness, emotional intelligence and personal power stimulated a significant shift in our collaboration with business partners to build a sustainable agricultural sector in NSW. ~ Michael Bullen DDG Dept Primary Industry



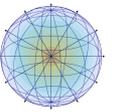
Occasionally we meet folks who bring a unique perspective to strategic conversations, creating new thoughts, ideas and innovative thinking. Antoinette is one such person, drawing on a wonderful knowledge and understanding in so many aspects of life and business. ~ Richard Boggon, Regional Director Transport Infrastructure Services, Parsons Brinckerhoff

Antoinette's creative and spiritual thinking has impacted so positively on my life this year. She is a sensitive, creative and highly gifted coach. Her ability to coach senior leaders through the strategic maze of government while they balance their personal development is her strength. She is an Executive Coach of the highest calibre. ~ Jane Simmons, Executive Director of Public Schools

I enjoy my coaching meetings with Antoinette principally because I find myself uncomfortable. She continually challenges my normalized way of thinking. The coaching is not a linear process. It's emergent, disruptive and even disconcerting - that's where the magic is. Antoinette considers things from a deeper dynamic perspective. Her focus on our uniqueness is inspiring. ~ Greg Ellis EGM Opal Transport

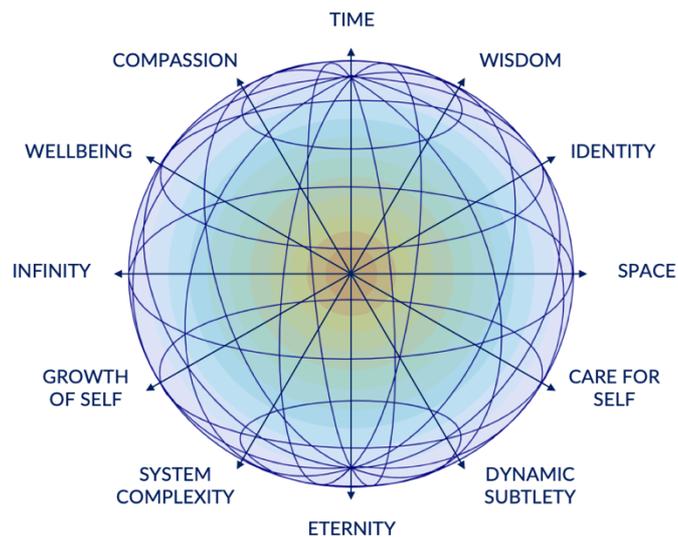
Antoinette asks the right questions that lead to very thought provoking and confronting decisions. However, this really helped me personally and professionally. She provided ideas on how to lead more strategically, which has been so important to my leadership impact. Thank you for your unwavering support, advice and mentorship; you are a real treasure! ~ Elisa Recchi, Director Risk Management HSBC

Antoinette is extremely insightful and asks questions that fundamentally shift the way I see myself and others. I have seen improvements in many different parts of my life including a significant recent work promotion. I would recommend Antoinette to anyone looking to gain a wider perspective on the world, challenge themselves and grow as an individual. ~ Tony Eames, GM Strategic Development, RPS



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*The higher our self-expression and the deeper our self-awareness,
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Antoinette J Braks*

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