

# Leadership: Helping Others to Succeed

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**Leadership: Helping Others to Succeed** features interviews with some of today's most inspiring speakers, leaders, and authors who share their insight into what it takes to motivate others. In Chapter 6, Dian Harrison and Michael Takagawa discuss how their long-term collaboration has yielded more dramatic and sustainable business results than the typical client/coach association'. Harrison is President and CEO of Planned Parenthood Golden Gate, one of the largest Planned Parenthood affiliates in the United States. In leading her organization through a successful merger, business turnaround, and strategic reinvention, Ms. Harrison entrusted Mr. Takagawa and the Corporate Edge Team with the inner workings of her organization. The remarkable results that Ms. Harrison and her organization continue to achieve bear witness to the amazing success of the Executive Partnership.

## Chapter 6

# The Interview

## **David Wright (Wright)**

Today we're talking with Mike Takagawa and Dian Harrison. Mike Takagawa is an executive advisor and the CEO of Corporate Edge, Inc., a premier leadership coaching firm in San Francisco, California. As a former company president and Fortune 500 senior executive, Mike is a highly regarded executive advisor to prominent CEOs and corporate leaders, with clients that include Adobe Systems, Kaiser Permanente, Cisco Systems and the San Francisco Chronicle. Dian Harrison, a longtime client of Mike's, is president and CEO of Planned Parenthood Golden Gate. She has been recognized as one of San Francisco's "Top 100 Most Influential Women Leaders" by the *San Francisco Business Times*. For seven years Mike and Dian have enjoyed a collaborative working relationship that represents a true leadership breakthrough. In leading her organization through a successful merger, business turnaround and strategic reinvention, Dian has entrusted Mike with complete access to the inner workings of her organization. This long-term role goes beyond the traditional client/coach agreement: Mike integrates the best attributes of a coach, mentor and consultant. He terms this collaboration an *executive partnership*.

The executive partnership exemplifies the next evolution in leadership success for CEOs and senior executives whose needs differ greatly from the needs of mid-level executives. In today's marketplace it is acceptable for corporate leaders to ask for help, but the solutions they require are more complex than those offered by traditional coaching and consulting approaches. C-level executives can achieve remarkable success by partnering with someone who has been there and done that—someone who possesses both exemplary executive coaching skills and solid corporate executive experience. This is the executive partnership.

Mike and Dian, welcome to *Leadership: Helping Others to Succeed*.

## **Mike Takagawa (Takagawa)**

Thank you, David.

## **Dian Harrison (Harrison)**

Thank you.

## **Wright**

Mike and Dian, the term "executive partnership" is a new term. How do you define executive partnership?

## **Takagawa**

The executive partnership starts with the premise that the needs of CEOs and senior level executives are vastly different—more pronounced—than those of mid-level managers. Because the organizational stakes are so high, C-level executives require more advanced means of assistance than those offered broadly through traditional coaching. The executive partnership is that advanced level of assistance,

where the contributions and collaborative efforts of both the senior executive and the executive partner propel the value of the partnership and ultimately the performance of the company.

As a former corporate executive, I've experienced the same immense pressures that CEOs face, where an individual's actions and behaviors can have profound effects on an entire company's results. And I now see those high-stakes pressures on my Corporate Edge clients. I know that many newly promoted CEOs feel overworked and unprepared for dealing with timely and urgent issues. It can be lonely at the top. Yet, it's difficult to feel as though you can ask for help—to be vulnerable—because there's often the feeling that you need all the answers. And yet we know that no one has all the answers.

The executive partnership is a long term, collaborative relationship between an executive partner and a CEO—a two-way relationship of mutual learning and trust, a collaboration more substantive than broad-based coaching. The executive partner and the CEO—whose singular position in the company requires singular assistance—are both critically important to the success and value of the partnership.

The executive partner possesses three characteristics, and for the sake of this discussion, I'll use the "he" pronoun: First, an executive partner has substantial senior leadership experience; he is effective because he can relate to the situation from a business experience standpoint. He has been there, done that. He has been in those shoes, and shares the vantage point of the pressures and responsibilities facing corporate leaders.

Secondly, the executive partner is an outstanding personal coach. He helps CEOs and senior executives bring out their best abilities, not by telling them what to do, but by helping them on their own journeys, leveraging their talents to the highest degree possible and giving them the chance to say, "I'm confused" or "I need some help."

And thirdly, the characteristic that distinguishes an executive partner from a traditional coach is the ability to work equally effectively with teams. He is able to draw upon executive experience and facilitation skills in group situations where teams gel more effectively together, and results and success cascade through the organizations.

At its very core, the executive partnership paves the way for a new breed of leaders by providing them non-judgmental sounding boards, by encouraging collaboration and by allowing them to fully explore their potential.

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### **Harrison**

I define executive partnership as just that—a partnership. It is not a consulting relationship where someone is hired to tell the leader what to do and how to do it. Mike was talking just now about the new breed of leaders and I absolutely agree. The new breed of leader does not stand alone. The new breed of leader is collaborative—one who is not afraid to ask for help and who allows for that openness and trust to thrive in others within the organization. CEOs are focused on the most efficient use of funds, and having to do more with less—on maximizing our resources. The potential for effectiveness and productivity is very real with an executive partnership. At Planned Parenthood Golden Gate, our incentive to succeed is our mission, so the fact that we are able to be effective and productive and meet the needs of an individual group of people is very empowering. Leaders can make their visions happen with an executive partnership.

### **Wright**

Dian, what circumstances compelled you to seek the counsel of someone like Mike as your advisor, or, as he eventually became, your executive partner?

### **Harrison**

Ten years ago several Planned Parenthood affiliates in the San Francisco Bay Area merged into one larger organization in response to the new managed care environment. I went from running a Planned Parenthood affiliate in San Mateo County to running Planned Parenthood Golden Gate, an organization with four times the resources of the affiliate, and serving the largest section of the San Francisco Bay Area. The first year for me was absolutely overwhelming. I wanted to make sure the organization was successful since 65,000 people rely on Planned Parenthood Golden Gate for quality medical care each year. If the organization was successful, then I would be successful and all of us would be successful.

I realized that the only way I was going to be successful as a CEO of a much larger organization was to seek help. Fortunately I had a progressive board member who happened to be the board chair at the time. After going through the merger of the three affiliates in the Bay Area, I said to her, “You know, there is just no way that I can continue to do this job by myself and do it effectively. It is entirely too big.” Her immediate response was that I needed an executive coach, but frankly, I was a bit skeptical. I had preconceived notions about coaches and consultants, and I felt that since I was the president and CEO of this organization, I should be able to do this all myself. Considering fiscal prudence, I wasn’t sure we should expend our resources on consultants.

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What I quickly learned, however, was that no matter what organization you lead, the idea that you should be able to do it all yourself just doesn't apply in today's world. I realized asking for help is a sign of vision and strength. CEOs like me who are going through dramatic changes and transitions need an executive partner. It doesn't have to be lonely at the top, and it is okay to have an executive partner to help you and your organization perform at the highest possible level.

### **Wright**

Mike, what are the differences between your concept of the executive partnership and the more traditional and widely understood concepts of coaching, mentoring and consulting?

### **Takagawa**

There are many labels that are commonly used to refer to different types of professional services. To distinguish the executive partner from a consultant or a coach is important.

The executive partner is more about the type of relationship, which is different from a traditional coaching or consulting relationship. There are three primary differences.

First, the executive partnership focuses on long-term results as opposed to short-term fixes. A short-term fix might be something such as: "I have a big presentation to make to my executive team at a meeting next month and I need to be coached or trained on how to give a great presentation." While this may warrant some attention in an executive partnership, greater attention is focused on decisions that will impact corporate results. Too often, not enough day-to-day attention is given to long-term concerns. The executive partnership refocuses this attention.

Secondly, an executive partner becomes a member of the corporate family. Dian has entrusted me with complete access to the inner workings of her organization, and for that I am very grateful. I sit in on strategic sessions with her team. I am intimately familiar with their long-term strategy. I'm involved with organizational matters that might typically be held at arm's length from an external consultant.

And finally, the executive partnership is a hybrid model of leadership assistance that addresses the intense, high-stakes needs of CEOs. It is an effective blending and integration of the best of coaching, consulting and mentoring. It is best understood when we contrast the executive partnership with those three most frequently used terms: mentoring, consulting and coaching.

Mentors share their wisdom and expertise with clients. They've walked in the same shoes and had the same roles as their clients. They offer answers, opinions and judgments to help others.

*The executive partnership is a hybrid model of leadership assistance that addresses the intense, high-stakes needs of CEOs, blending and integrating the best of coaching, consulting and mentoring.*

Consultants bring very specific knowledge or experience about an issue at hand. They come in offering solutions based on their work place experience. They walk in with answers to specific issues or problems.

Coaching is a little different. Coaching helps individuals find their own answers and broaden their perspectives through ongoing reflective conversation. Over the last few years, coaching has become very widespread to the point where it has become almost generic—coaching can mean different services to different people.

As a result, the executive partnership is distinct as an integration of all three of these disciplines. An executive partner is a person who is willing to make long-term commitments to senior executives toward their long-term goals. The partnership requires a very forward thinking CEO—a new breed of leader who can provide that kind of access. Ironically, I often work as an executive partner with CEOs whose organizations, by and large, do not utilize many outside consultants, just as Dian articulated when we first started working together. The executive partnership is an evolution in business leadership success because it embodies the best of coaching, consulting and mentoring.

#### **Wright**

Dian, what have been the benefits of your executive partnership with Mike and his company Corporate Edge to both you and your organization? What has become possible because of the partnership that wouldn't have been possible with a more traditional business coach or consultant?

#### **Harrison**

Since the merger, we have experienced major challenges. I realized early on that it wasn't enough simply to survive as a larger affiliate; leaders in all organizations want to do more than survive—they want to succeed and thrive and flourish.

When people talk about the return on investment, I say that our return on investment is people—we invest in people. It was important for the executive partnership to work for me because, in so doing, it would help the people we are helping with our services and resources.

We are being pushed all the time to evaluate how we provide services and how we can provide those services in an efficient and effective business-like manner. Having Mike as my executive partner helps me to understand the process more clearly and take advantage of the opportunities more effectively. What that means to the organization is that we are developing a mission-driven business model, and the results we achieve will cascade throughout the organization. We are building the stability needed to sustain our organization long-term.

*As a direct result of working with Corporate Edge, our major business turnaround effort resulted in radical changes that contributed more than \$1 million in new revenue sources to Planned Parenthood Golden Gate.*

Our results have been absolutely amazing. We recently implemented a major business turnaround whereby we empowered and coached our employees to create new, innovative programs for Planned Parenthood Golden Gate. We titled this effort our “Re-Invention Program,” and it resulted in radical changes that contributed more than \$1 million in new revenue sources to the organization.

On another occasion, we established an internal mentoring program that inspired our mid-level managers to create new internal programs that have dramatically increased the productivity, retention levels and spirit of collaboration for our employees. Those two concrete examples of success are the direct result of my work with Mike, my executive partner. Because of those results, I knew I could continue to sell this relationship to my board as an investment in the organization.

In addition to the work Mike and I have done together specifically, he and his Corporate Edge team have also worked with several members of my senior leadership team. Let me give you a vivid example of how we have all worked together. My entire leadership team had flown to Salt Lake City for a meeting. We were all on the same plane and upon arriving, we were all in the same van. I called Mike and said, “I wonder what would have happened if an accident had occurred with the plane or the van and the entire senior leadership of this organization were gone. What would have happened to the organization and who would be able to step up and take over to continue providing the services in the communities that needed us the most?”

That is when we decided to take action before the problem actually arose. I am required by my board to update a CEO succession plan each year. It became clear, however, that we had to do the same for every leader in this organization. I wasn’t the only one who needed a successor; every member of the leadership team needed one. So we identified twelve “rising stars” from the organization who we considered to be the best and brightest and who had the most potential for growth; we call the group the “Go Team.” We developed a succession planning initiative to groom and develop them to move up in the organization should anything happen to me or other senior managers. That is a perfect example of how our executive partnership has helped Planned Parenthood Golden Gate to move from a potential problem to a concrete solution.

#### **Takagawa**

David, I’d like to add a comment to what Dian was talking about. The Go Team concept is very different from a traditional development program in that this is an ongoing opportunity to empower key leaders and the next generation of leaders within the organization. One of the things Dian has always believed in is that we need to “walk the talk.” Here we were talking a lot about coaching and mentoring, and we decided to integrate that into this program directly. The Go Team program was so successful that after its launch, the initial pilot group members were the very ones who were there to develop and coach the next generation of leaders in the organization. So it wasn’t a traditional training program where we brought in trainers to teach a group of people. This program was a way to allow the members of Dian’s organization to become the change agents and to coach their own team members.

#### **Wright**

It sounds like the executive partnership goes far beyond the standard operating procedures of most leadership concepts.

## Takagawa

Yes.

## Wright

Mike, what steps formed the path that led you to develop this executive partnership concept?

## Takagawa

The concept came to me from first-hand experience. I am not a life-long consultant. I had an executive career prior to founding Corporate Edge, and I am fortunate that I experienced this concept firsthand from the perspective of a CEO client. Several years ago I was appointed the new president of a global consumer product company. It was my first appointment as president of an organization. I was very excited and yet, I admit, I was a bit overwhelmed and suffered the same anxiety that Dian described earlier.

We were going through some difficult financial times and needed a dramatic turn-around to save and preserve the company. Not surprisingly, we were suffering from poor morale; our employees were feeling more like losers than winners. It was very intense and I felt the glare of being under the microscope. I was fortunate that I ended up working with someone who worked with me in the same way that I work with clients today—as an executive partner—except that this was more than ten years ago and terms like “coaching” or “executive advisor” didn’t exist. He simply called himself a consultant, but in reality he helped me in far more ways than a traditional consultant. As a former CEO himself, he had firsthand experience in dealing with my issues. Yet, he had the communications and coaching skills to help me develop my own solutions that were best suited to my leadership style.

In my role as a new company president, I struggled with the fact that I had so many constituencies: my own executive team and my employees, our corporate partners and customers, our global distributors and, of course, our shareholders and my board of directors. I felt the pressure of having to make decisions quickly, and I found it difficult to get an objective opinion, straight talk, a true line of feedback. I was very fortunate to have an advisor who was skilled enough to play a variety of roles: part mentor, part sounding board, part confidant, part strategist, part consultant, all wrapped up in one person. While he worked with me individually, he also worked directly with my executive team.

In the end we were very successful. We were able to literally save the business. We overhauled our business and became profitable by re-inventing our business model, changing our product line and recreating the feeling of winning. We regained the enthusiasm that had made the company so successful, and once again we became a company that everyone wanted to work for. As a result we caught the attention of one of the largest,

*My inspiration to create Corporate Edge came from my own experience as a Fortune 500 company president. I wanted to work collaboratively with CEOs and senior level executives who are in the same place that I have been and who are experiencing the same challenges that I have known.*

most respected companies in the world and we orchestrated a successful merger. My “executive partner” (a term I had not used at the time) was with me every step of the way. We couldn’t have succeeded without his assistance, and without his objective feedback and advice. He helped me succeed in my “career defining moment” to-date.

That was my inspiration to create Corporate Edge nine years ago—to work collaboratively with CEOs and senior level executives who are in the same place that I have been and who are experiencing the same challenges that I have known. It is my passion to work as an executive partner—a coach, mentor and leadership consultant—with my clients.

Nine years ago, terms like “executive coaching” were not widespread. Yet, long before coaching emerged on the corporate landscape, I had always worked in this manner, combining individual coaching with leadership consulting and leveraging my executive experience to help senior level executives be successful. This executive partner relationship that Dian and I have is not new to me, but it’s only now, however, through my work with her, that we have solidified it and given it a name—something to distinguish it, because it is clear that CEOs and senior level executives require something more substantive than traditional coaching.

I’ve made key discoveries over the years, and have learned that my approach to leadership success doesn’t have to be handled by one person, as I had initially experienced. I’ve developed my company, Corporate Edge, to provide specific methodologies and models to offer this highly valued coaching/consulting/mentoring hybrid solution to our corporate clients utilizing a team of very skilled, higher thinking coaches and consultants.

### **Wright**

Dian, what were the challenges of getting into this relationship? Did you face any initial feelings of doubt or resistance when you entered into the partnership?

### **Harrison**

Well absolutely the resistance was there. Boards usually say to CEOs, “You should be able to figure that out on your own” or “You have us to help you figure that out.” And there is a notion that a CEO should be self-sufficient; and the thought is that if our CEO needs help, then there must be something wrong with him or her. There was some resistance on my part, as well. I wasn’t accustomed to working with external consultants, and I was mindful of spending the organization’s money. Some of this resistance was self-induced; some of it was a matter of perception. In overcoming that resistance, however, I realized that there were some real opportunities for leadership growth. And my board chair encouraged me. She said, “Go on, let’s see how it works out.” So I did.

*While I faced initial feelings of resistance in working with an external consultant, what I came to realize is Mike is not only a skilled coach, but an experienced corporate CEO. I believed that his skills and knowledge were transferable, and that our partnership would benefit not only me, but the entire organization long-term.*

We started off slowly: I defined for Mike what some of my challenges were, and he told me about what he did. While I had never experienced this level of closeness with an executive consultant before, I knew that not only did I need the help, but that my organization needed the help, too. What I came to realize was that Mike was not only a skilled coach, but an experienced corporate CEO. I believed that his skills and knowledge were transferable, and that our partnership would benefit not only me, but the entire organization long-term. We've both worked very hard, and we both take great pride in my organization's success.

### **Wright**

Mike, your background and experience have been largely with Fortune 500 corporations—how did you know that you could be of such value to a CEO of a nonprofit organization?

### **Takagawa**

At Corporate Edge we haven't worked with many nonprofit client organizations. Dian is a rare breed of CEO in a nonprofit organization; she is not afraid to take bold steps and push the envelope. I have never worked for a nonprofit organization in my career, just as I have never worked for a technology company either, and yet today, more than 50 percent of our clients at Corporate Edge are technology companies.

As Dian said, when we first met and began our conversations, she described her industry challenges and the challenges of the merger, and how she was faced with leading an organization much larger in size than it had been before. She also described the need to reinvent the organization and change the way Planned Parenthood did business; she needed to overcome some highly steeped perceptions regarding what the organization stood for. She went on to talk about the need to create new revenue streams for greater long-term financial viability. These challenges were direct business issues that I clearly related to because of my own executive experience. She was looking to find new ways of doing business and had the need to show immediate results.

As with any new client, I first had to learn about the organization and its industry. I invested a great deal of time learning about Planned Parenthood and its mission-based business model. Dian allowed me to sit in on her executive staff meetings and I met several board members. I listened, I learned. I met a lot of her people because it was important for me to understand the world she operates in. And yet strictly from a business standpoint, I went into our relationship already familiar with the business outcomes she was trying to realize because of my own executive experiences.

Interestingly, as we started to work together, we discovered that my background in other industries, outside the nonprofit realm, was actually an asset. Dian is clearly a change agent, and because she is so

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innovative and has such a clear, passionate vision, we were able to come up with ideas totally outside the norm within her particular industry. What we found is that we now have a partnership based on understanding the business issues we have in common. These issues include bringing in new ideas from other industries outside her immediate space. So my experience in other industries, coupled with her open-mindedness, has proven to be an asset.

#### **Harrison**

I think Mike made some very good points. Many times when coaches are hired, they are hired to work only with the CEO. But Mike has done so much more. He and several of his team members have worked with many aspects of my organization, including my senior leadership team and my board of directors. Mike has become a part of our organization at all levels, and we are now leveraging his knowledge effectively. Clearly our relationship is one of mutual learning. He continues to learn from me, as I continue to learn from him.

#### **Wright**

It is almost as if the hybrid business model is a very effective mid-range for both nonprofit and for-profit corporations.

#### **Takagawa**

That is a key point we're making here, David. This integration that we call the executive partnership can have a profound impact on all companies and organizations, and their bottom lines.

#### **Harrison**

CEOs will come to realize that working with an executive partner is a wise investment. It's fulfilling, and it can be fun, especially if you get the right partner. It has been an uplifting experience for me and it has alleviated a lot of the fears and stress that I had as I was moving into a much larger organization. As do most CEOs, I have plenty of sleepless nights, but I feel empowered because I know it is okay to ask for help and I know I don't have to have all the answers myself.

#### **Wright**

Dian, how has your work with Mike made you a more effective CEO?

#### **Harrison**

As with most business industries, nonprofits are going through tremendous change. I have been in this sector for the last thirty-five years, and I speak from seasoned experience when I say that oftentimes CEOs and their boards of directors can become a bit set in their ways regarding decision-making and empowerment. It used to be that I needed approval for everything from my board. This meant I couldn't make changes or

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improvements unless my board approved them, and we simply weren't as effective or efficient as we could be to help the people we were committed to helping in our community. We were working with a traditional nonprofit model in a business-driven economy. The result of these obstacles often meant that we were not as swift to take advantage of market opportunities, or as effective in doing so, as we could be. Layers of approvals often stood in the way of progress.

Working with Mike has helped to create a greater level of empowerment at all levels. I know my board has been very supportive in empowering my role as CEO, and we are all delighted with our increased productivity together. My executive partnership with Mike is rewriting the rules for how to run an organization. It has also improved the productivity and operational effectiveness within our organization. Nonprofits often feel limited in their abilities to pay top wages to its employees. Yet, we can invest in our people in ways that make them feel fulfilled and hopefully glad to be working with Planned Parenthood. Developing the potential and effectiveness of our people is a wise investment.

The executive partnership builds the strength of the people under the CEO to carry the organization, in essence, to deepen the bench, if you will. This is an investment not only in the future of the organization, but in the people whom we serve and the people who work for Planned Parenthood Golden Gate. The executive partnership encourages my team and me to be more collaborative. We make decisions more effectively and more quickly, we take action more quickly, and we realize results more quickly. Our decisions produce results without delays, which have been the downfall of most organizations for a very long time.

#### **Takagawa**

Our goal together has been to improve the CEO's effectiveness and the performance of the entire organization. Over the years I have tried to learn enough about Dian, and to help Dian learn enough about me, to effectively be an extension of her and allow her to be an extension of myself.

#### **Wright**

Today we have been talking with Mike Takagawa and Dian Harrison. For seven years Mike and Dian have enjoyed a collaborative working relationship that represents a true leadership breakthrough. In leading her organization through a successful merger, business turnaround and strategic reinvention, Dian has entrusted Mike with complete access to the inner workings of her organization. This long-term role goes beyond the traditional client/coach agreement—Mike integrates the best attributes of a coach, mentor and consultant. He terms this collaboration an *executive partnership*.

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Mike and Dian, we really do appreciate your spending so much time with us today on *Leadership: Helping Others to Succeed* and answering all these questions.

**Harrison**

Thank you so much David.

**Takagawa**

Thank you.

# About The Authors

**Michael K. Takagawa** is an executive advisor and the CEO of Corporate Edge, Inc., a premier leadership coaching firm in San Francisco, California. A former company president and Fortune 500 senior executive with more than twenty years of leadership experience, Mr. Takagawa is a highly regarded executive advisor to prominent CEOs and corporate leaders. He founded Corporate Edge, Inc., in 1998 (long before the mass emergence of coaching as a business trend) to focus on the potential of new and future CEOs and fast-track senior executives. Corporate Edge clients include Adobe Systems, Kaiser Permanente, Cisco Systems, National Semiconductor, *San Francisco Chronicle* and Planned Parenthood Golden Gate.

**Dian J. Harrison** is the president and CEO of Planned Parenthood Golden Gate, one of the largest Planned Parenthood affiliates in the United States. A highly acclaimed leader and speaker, Ms. Harrison is the driving force behind the organization's international family planning partnership with Ethiopia and its East Oakland *Women First* case management program. In thirty years of distinguished leadership in the nonprofit sector, Ms. Harrison has earned great recognition, including the *San Francisco Business Times* "100 Most Influential Women in Business" distinction.

Mr. Takagawa and Ms. Harrison are co-authors of *The Executive Partnership*. Written for CEOs and senior executives of both corporations and nonprofits, their book focuses on leadership practices and introduces the concept of the *executive partnership* as the next evolution in leadership success.

**Michael K. Takagawa, Executive Advisor and CEO**

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