



# TRANSITIONS:

TOOLS AND STRATEGIES FOR SUCCESS

# TRANSITIONS

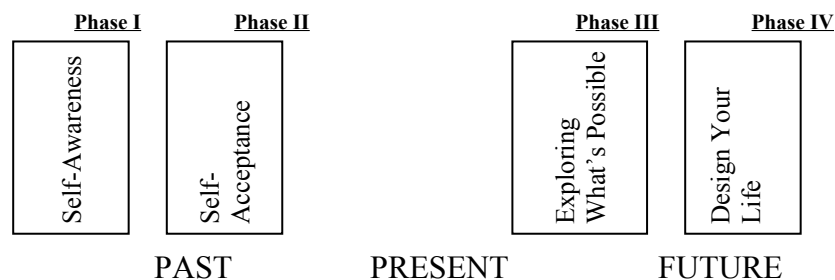
## What the Transitions Institute Provides

The Transitions Institute recognizes the difficulty that all people experience when going through major life changes. We have developed programs that provide guidance, safety and professional expertise to support our clients in understanding who and where they are in the larger “game of life”. We provide guidance and support to realistically address the opportunities and responsibilities that accompany living a successful life.

## The Transitions Process

While it is commonly thought that most people resist change, Dr. Zelman believes that it is the uncertainty that often accompanies change that people resist. For this reason, the Transitions Process starts by providing an understanding of the change process itself. With this new approach to change, our clients work effectively with our transitions professionals.

The Process consists of four phases:



- During **Phase I**, you explore what you have been committed to and what you are committed to for the future.
- During **Phase II**, you will identify the key life events that have held you back from living your full potential. Clients come to realize that they really do have the power to choose a more effective and productive way of living their lives.
- During **Phase III**, you begin to see, based on your personal profile, the possibilities that are available to you – things that are calling you, dreams that have long been buried. This results in a freedom to explore possible futures that challenge and inspire you.
- During **Phase IV**, you explore pathways to the future and develop your personal game plan to keep you on your selected path.

# THE FORMAT

## How It Works

Human beings operate under the totally false notion that our past *determines* our future – NOT SO. While it is an influencing factor, the past can be put aside, or your relationship to it can be altered, which in turn allows you to powerfully proceed in designing a life that previously was unobtainable. By the end of the Process, your focus is shifted from the past to the future and that makes all the difference in “creating a life” versus surviving it.

## Who It Is For

Anyone willing to risk the belief that their life is already laid out for them – that they can’t change. If you’ve got the guts and commitment to look at yourself and invest your talents, skills, & willpower in yourself, we can show you how to do this and produce extraordinary results.

## How Long It Will Take

The basic Transitions Process consists of four day-long sessions over 2-3 months and a lifetime of practice. (**Transitions: Tools and Strategies for Success** meets for four 4-hour sessions in a small group setting.) Follow-up programs are available to support you in further developing areas you want to improve such as finances, health, career, relationships, etc.

## The Format

In each of the four sessions, Dr. Zelman covers a different topic comprised of a unique set of distinctions. Several methodologies are used: discussion, inquiry, presentation of information, assignments between sessions, etc.

### Day 1 *Assessment*

Skills, traits, history, vision, accomplishments, setbacks, etc.

Career, relationships, finances, legacy, health

### Day 2 *Acceptance*

Life-determining events, decisions made, etc.

Career, relationships, finances, legacy, health

### Day 3 *Possibility*

If you were totally free, who would you be?

Career, relationships, finances, legacy, health

### Day 4 *Structure*

Declaration of the Future you are committed to

Designing & creating of pathways & structures to help you fulfill the future you’re committed to

## Is This Program Only About the Future?

The only time you can impact the future is NOW – today’s practice produces tomorrow’s performance. But if we are practicing being thorough or rigorous today – guess what? Practice also affects us NOW. This is a good thing!

# WHAT YOU CAN EXPECT TO GET

## **Why Someone Should Do the Program**

For most individuals, the question is not “if”, but “when” will you require a personal or professional transition. There are a number of questions that rapidly follow that thought... Am I prepared? What additional training do I need? Do I even know what I want to do or can do? Most people attempt to answer these questions without the benefit of professional support – we think you should have the best support available by people who are trained in helping answer these questions.

## **The Kind of People Who Need This**

Anyone who isn't satisfied with merely “making it” through this life.

## **What Others Have Gotten Out of the Program**

The Transitions Process is tailored to each specific client; therefore the results they produce out of participating in the process are as different as the individuals themselves. For some it is in the area of satisfying and deeply fulfilling relationships, for others they design entirely new careers that utilize the gifts they have to contribute to the world. Clients also find that they produce results they never even thought about – the kind of results that weren't even on their radar screen – so what people get out of the process really depends on the person participating.

What people commonly experience by doing our program (see Endorsements):

- The courage and knowledge that they can change.
- A totally new and freeing way of looking at yourself
- A powerful declaration of the future you are committed to.
- A game plan for an extraordinary life.

## **How the Program Can Work for You**

It's very easy to forget that life is a gift. That the talents, skills, abilities, and intellect you have been given are gifts. We have all been given so many gifts that many of them have been forgotten. People who have been blessed with extraordinary athletic ability or intellect or musical ability often tend to focus on only one aspect of their nature. That's the good news & the bad news. That focus may have led to a career, but it concealed other aspects or gifts of being human. They are still there; you just have to broaden your focus.

# WHY THIS PROGRAM

## **The Leaders of the Program**

The programs are led by members of Transitions Institute's faculty. They are highly trained professionals with degrees and credentials in their respective fields.

## **How It Differs from Career Counseling**

Career counseling looks at what to do – we help you discover *who you are*.

## **How It Differs from Traditional Coaching**

Coaches normally point out what's next, help set goals and provide encouragement to get you to another level of performance. We do this, but from a completely different perspective – it's not about getting you to do something. You don't need us for that. It's about inventing, designing, and creating who you are!

## **Is This Some Form of Psychological Training**

Yes and No. We are all psychological beings – too late – can't help that. But to try and explain your life, who you are as a human being inside some psychological model – that's robbery. It robs you of what's yours – your talents, innate abilities, your will, & spiritual nature. Never let someone define you in psychological terms – it's beneath you.

## **Other Questions to Help You Evaluate Your Need for the Program**

- Do you like where your life is headed?
- Have you taken the time to be proactive in creating the future, or are you waiting to see what cards you are dealt?
- Do you feel limited by a lack of time?
- Do you feel trapped by your career, your relationships, your lifestyle?
- Do you feel like your life belongs to someone else?
- Are you not satisfied with your life – in spite of all the money you are making?
- Do you have concerns about your financial future, in spite of all the money you are making?
- Do you define success only in monetary terms?
- Do you wonder what will happen when you retire?
- Are you concerned about fulfilling your full potential as a human being?
- Are you concerned about the impact of your professional career on your personal life?
- Have you thought about the kind of legacy you would like to leave for your family & community?

## AVAILABLE PROGRAMS & COST

### **Transitions Assessment Profile**

The Transitions Assessment Profile is a stand-alone product given prior to the Transitions Process. It is a diagnostic tool, which provides insight and feedback regarding an individual's readiness for a major life transition. It clarifies a person's strengths and weaknesses in areas such as career development, finance, relationships, health and creating a legacy.

**Cost:** \$1,500.00

**Time Required:** Approximately two hours to administer the Transitions Assessment Profile  
Another two hours for results and feedback of the Profile

### **Transitions Process**

The Transitions Process consists of a four part program that supports people in bridging the gap between where they are today and the life they would like to live in the future.

**Cost:** \$30,000.00\*

**Time Required:** Four, single, day-long sessions over 1-3 months\*

\*This program can also be offered on a half-day basis for a reduced fee.

### **Transitions: Tools and Strategies for Success (TSS)**

TSS provides people with the tools for a rapid and successful transition. This program is designed for groups.

**Cost:** \$2,400.00  
\$100 per session for Reviewers

**Time Required:** Four, 4-hour sessions over 2-3 months

**Upcoming Programs:** Please contact us for currently scheduled programs.

### **To Register or Find Out More about the Programs**

By Phone: (214) 528-9401  
By Fax: (817) 288-0855  
By Mail: 47 Highland Park Village, Suite 209  
Dallas, TX 75205  
By Email: [dzelman@transitionsinstitute.com](mailto:dzelman@transitionsinstitute.com)

# CLIENT LIST

## ◆ PARTIAL CORPORATE CLIENT LIST ◆

American Adhesives	Kennedy Group
American Airlines	Larry J. Leon & Associates
American Express Financial Advisors	Mass Mutual Life Insurance
ARCO	Methodist Hospital, Dallas
Aspen School District	Metroplex Emergency Physicians Assoc.
Aspen Valley Hospital	Metroplex Engineering
AskJeeves.com	Mobil Oil
AT&T	Mutuals.com
Bank One	MyPoints.com
Bantam Doubleday Dell	New Concepts Foundation
Bell Chemical	Parkland Hospital
Campfire Girls	Plantworks
City of Dallas	Random House Publishing
Crown Capital	Robert Young & Associates
Crown Insurance	Roxbury Capital Management
Dallas Family Guidance Center	St. Paul Hospital
Dallas Gas & Electric	<i>San Antonio Express News</i>
Dallas Police Department	Southwestern Medical School
Dallas Rotary Club	State Farm Insurance
Dell	SunCorp
Design Fabricators	TPA Engineering
EG&G	Texas Instruments
Fresh Direct	The Weitzman Group
Greyhound	Thomas Dunn & Company
Hamlin Capital	U.S. Robotics
Hampton Inns	Underground Shopper
Henry S. Miller Corp.	Univ. of Pennsylvania, Medical School
Hilton Hotels Worldwide	University of Texas
I-Behavior, Inc.	Wedding List Co.
InnOvation Voice Technologies	YMCA
JP Morgan Chase	Zdenek Financial Planning

## ◆ PARTIAL LIST BY CLIENT CATEGORY ◆

Airlines	Health Care Professionals/Organizations
Architecture/Design Firms	Homemakers
Astronauts	Investment Bankers
Attorneys	National Entertainers
Banking	Not-for-Profit Organizations
City Governments	Oil & Gas/Energy Industry
Computer Manufacturers	Physicians
Communications Corporations	Professional Athletes
Departments of Education	Real Estate / Development
E-Commerce Startups	Retail
Entrepreneurs	Senior Corporate Executives
Financial Planners	Software Manufacturing & Development

## ABOUT DAVID ZELMAN, Ph.D.

### CREDENTIALS

- C.E.O. & Founder of Transitions Institute, Inc.
- C.E.O. & Founder of Innovative Strategies, Inc.
- Doctorate from University of Wisconsin: Madison in Behavioral Psychology
- Co-Author: Financial Fitness: Six Principles for Building a Long-Term Wealth Consciousness
- Transitions Programs / Consulting / Leadership Development for over twenty years
  - American Airlines
  - Hilton Hotels Worldwide Corp.
  - Hampton Inn
  - Random House Publishing
  - Roxbury Capital Management
- Executive Coach
  - JP Morgan Chase
  - Zdenek Financial Planning
  - AskJeeves.com
  - Hamlin Capital

### PRESENTATIONS / SPEAKING ENGAGEMENTS

- Entrepreneurs Organization: “Managing Transitions”: Chicago, IL – 2007
- InvestLinc National Conferences: Chicago, IL – 2005, 2006; Cleveland, OH – 2006, Atlanta, GA – 2007
- Gathering of Titans Conference at MIT: Boston, Massachusetts – 2005, 2006
- Organizational Development Network of Greater New York, “Managing Transitions” – 2004
- Renaissance Conference: North Carolina – 2001
- National Speakers Association Leadership & Productivity Institute, “Success Is Not a Day Job”: Dallas, Texas – 2002
- International Speakers Bureau: Dallas, Texas – 2000-present
- American Airlines, “Keys to the Future”: Dallas, Texas – 1994
- National Association of Store Fixture Manufacturers Convention: Las Vegas, Nevada – 1999
- Northeast Conference for Certified Financial Planners: New Jersey – 2000
- Bank One: Dallas, Texas – 1995
- American Express Financial Advisors: Dallas, Texas – 1999
- Dallas Rotary Club: Dallas, Texas – 1999

### MEDIA

- Fast Company, “Balance is Bunk”, October 2004
- Dallas Morning News, “What Is Carty’s Next Destination? The Usual Career Routes May Not Be Options for Ex-AMR Head”, May 9, 2003
- New York Times, “Executive Life; A Chief’s Anguish: Letting Workers Go”, December 29, 2002
- Fortune Magazine, “Agents of Change”, April 1, 2002
- New York Times, “Trading Places, C.E.O. Does Mrs. Mom”, February 7, 2002
- London Financial Times, “A Re-Design for Life”, April 2001
- British Vogue, “A Design for Living”, June 2000
- Dallas Morning News, “Gotta Get a Life!”, January 17, 1999
- Wall Street Journal, “Managing your Career”, June 30, 1998

- Chapters by Candice Carpenter, McGraw-Hill, 2002

## ENDORSEMENTS

“David did more for my brother and me in two sessions than our mother did in 30 years. He helped us resolve issues that stood in the way of our career advancement.”

**Tommy Smothers**  
*Comedian*

“David uses a communication technique that enables people to have more freedom and power by examining their life in a new light. We have hidden perceptions that blind and limit us; he helps us see.”

**Dan Weston**  
*Management Consultant*

“David Zelman enabled me to focus on the important aspects of my life. My future financial wealth will be the result of engaging in activities that I clearly have chosen for the right reasons. My guess is that I’ll not only make more money – I plan to have a lot more fun along the way.”

**Steven D. Goldstein**  
*Former Chairman, American Express Bank*

“Of all the transition programs I’ve worked through and studied, David Zelman’s is the least likely to be mass-produced. At \$30,000 for four days, David is at the high end of the business. He works mostly with venture capitalists and bankers, but he occupies the high end in wisdom and effectiveness, too.”

**Candice Carpenter**  
*Founder & CEO of iVillage.com and author of Chapters*

“David Zelman is a true pioneer in the field of psychology. His technology enables people to break through barriers and achieve virtually anything they set their mind to. His unparalleled approach to human achievement should be the standard for all psychologists the world over. I believe his message has mass appeal.”

**John van Merkensteijn**  
*Investment Banker*

“The world is going so fast that you stop communicating. What David did was put the brakes on slightly...he helped me take my decorating business to new heights.”

**Kelly Hoppen**  
*London Designer*

“David had a significant impact on both my business and personal life. I’m doing more business now because I’m having more fun working, and I’m creating more of my own wealth because I’m enjoying my work. I also have exceptional relationships with my wife and friends.”

**Larry Leon**  
*Real Estate Executive*

## ENDORSEMENTS

“I never knew how complex my feelings about wealth were until David Zelman pointed out several contradictions that were staring me in the face. Looking at this fascinating subject is not only rewarding, it's essential, and David is an excellent guide.”

**Marc Stein**  
*Chief Technology Officer of ArtCouncil Online*

“Everyone, including myself, thought it was time for me to retire. Thank goodness this program shifted my perspective from retirement to re-engagement.”

**Lester Wunderman**  
*Cato, Johnson, Wunderman*

“From professional athlete to business consultant... Dr. Zelman guided me easily through what could have been a difficult transition process to my next successful career.”

**Jorge Castro**  
*Former Professional Soccer Player & Coach*

“David has a unique ability to get people on track faster than any coach I've met. He is committed to his client's breakthroughs, and he is a master at it. He settles for nothing less.”

**Dr. Lewis Pincus**  
*Internist and Wellness Consultant*