

## DAWN C. ZERBS, MBA

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### 2003-2021 TESTIMONIALS AND ARTIFACTS

- Organizational Change Management Case Studies
- Company Growth Plan Artifact
- Developing Top Talent Testimonials
- Client Testimonials
- Publications, Leadership Resources, Talk Topics, and Blog

# ORGANIZATIONAL CHANGE MANAGEMENT CASE STUDIES

- Organizational Change Management (OCM) Expert and Consultant
- Establish Priorities and Lead Strategic Change Initiatives
- Design Communication, Facilitate Collaboration, and Drive Results

## Use Case #1

A national company with locations across the US wanted to evolve their customer experience to increase sales volume and customer retention rates.

To do this, they needed to change the people, processes, and technology used to deliver the customer experience throughout its *entire* lifecycle– from marketing to sales to contracts to billing to customer service.

The transformation included all roles, divisions, and locations.

Item Name	Number
SF Leads	53,000
SF New Accounts	12,000
SF New Opportunities	9,000
SF Users	3,600
SF Converted Opportunities	545
SF Information Pipeline Members	2,770
SF Information Pipeline Posts	94
SF Knowledge Articles	76
News (views)	1,575
Posts and Documents	259
Blogs	23

ACTIVITIES & RESULTS



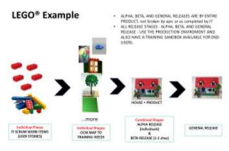
## Use Case #2

A regional bank with \$1B in assets needed to align IT resources and investments with the corporate strat

1. Strategy & Leadership
2. Governance
3. Structure
4. IT PMO to EPMO
5. OCM Function

## OCM Approach

1. Vision and Strategy
2. Leadership and Structure
3. Listening and Design
4. High-Level Roadmap
5. Release Strategy
6. Training and Communication Change Plan
7. Execute, Measure, Adapt, Repeat



# GROWTH PLAN EXAMPLE

- Strategic Planning
- Revenue Forecasting
- Annual Budgeting
- Reimagine, Align, and Optimize Operations
- Developed growth plan for regional law firm which achieved 100% revenue growth in 3.5 years – 1.5 years ahead of plan. Growth Strategy Placement below.

**2020 - THE PLAN FOR OUR NEXT CHAPTER OF GROWTH**

## vision

OUR AIM IS TO BE THE GO-TO FIRM FOR THE MOST PROGRESSIVE AND ADMIRABLE ORGANIZATIONS.

FOR OUR FUTURE

Our target is to generate \$100m in revenue by 2020

**strategy**  
A CHOICE TO LEAPFROG

- 0 Think exponentially out of the gate
- 1 Accelerate growth for our best clients
- 2 Ignite lawyers to be leaders - in the community, industry and profession
- 3 Stimulate client demand by giving them reason(s) to talk to and about SF
- 4 Create a few "accelerators" (growth platforms) that bridge to the future
- 5 Avoid costly "infrastructure" investments that don't yield immediate impact

### Where growth will come from

The Spencer Fane 10  
The Spencer Fane 10 will be a ranking of the Top 10 clients in terms of revenue growth potential.

2014	2020
2 clients > \$1M	12 clients > \$1M; 4 clients > \$2.5M

**The Big 8 (in priority order)**

Construction/Real Estate	Government/Public Admin
Financial Services	Manufacturing
Health Care	Waste Management
Technology	Wholesale/Retail Trade

65% of our fees and 75% of our clients come from Big 8

Kansas City	Denver
St Louis	Colorado Springs
Springfield	Omaha
Jefferson City	Overland Park

Practice Group Service Offerings  
Alternative Fee Arrangements (package of options)  
Legal Team Organization and Outsourcing  
Future Service Offering Innovations

## value

PROPOSITION

We will earn the trust and loyalty of our clients by:

- providing insight, perspective and counsel to help realize their ambitions;
- building lasting coalitions that align shared interests and yield more;
- setting the standard for service, pricing and delivery;

**Leadership.Direction.Confidence.**  
Delivered in an agile, responsive, caring and knowledgeable way.  
This is **The Spencer Fane Experience**

## leadership

SPARK & SUSTAIN THE GROWTH

To drive the next chapter of growth, we are asked to be leaders in our community, industry and profession

► **Expect more.**  
Go above and beyond.

► **Act with purpose.**  
Think outside the box and in the best interest of the client.

► **Trust and encourage others.**  
Build extraordinary teamwork across the entire firm.

► **Adapt quickly.**  
Adjust quickly to change with a positive attitude.

## roadmap

PLAN OF ATTACK FOR THE YEAR

CYCLE 1: JAN TO MAY 2014	CYCLE 2: JUNE TO SEPT 2014	CYCLE 3: OCT TO DEC 2014	CYCLE 4: JAN TO MARCH 2015
<ul style="list-style-type: none"> <li>✓ SF 500 Growth Analysis</li> <li>✓ PGL Planning and Budgeting Process</li> <li>✓ All-Attorney Retreat</li> <li>✓ Growth Labs &amp; Deep Dives (firm wide)</li> <li>✓ In depth interviews with Clients</li> <li>✓ Launched BD Leagues (Top 10, At bats)</li> </ul>	<ul style="list-style-type: none"> <li>► Finalize Revenue Growth Plan</li> <li>► Revenue Growth Plan distributed with All-hands meetings across offices</li> <li>► Develop Brand Strategy (web, PR, etc)</li> <li>► Establish Client Advisory Forum</li> <li>► Form UMB Swat Team (Accelerator)</li> <li>► Continue BD Leagues, with new tools</li> </ul>	<ul style="list-style-type: none"> <li>► Develop SF101 Workshops</li> <li>► Develop Client Growth Plans for SF10</li> <li>► Lunch and Learn (BD Seminars) series</li> <li>► Top 10 Lists for every Partner</li> <li>► Form Swat Team for AFA (Accelerator)</li> <li>► Develop AFA Value Pricing Strategy/pilot</li> </ul>	<ul style="list-style-type: none"> <li>► 2015 Planning by Big 8; shift and pool resources to support few things</li> <li>► Deploy brand strategy (PR, web &amp; event)</li> <li>► SF 101 Workshops deployed</li> <li>► All attorneys have Client Growth Plans for top 3 clients</li> </ul>

Spencer Fane

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## DEVELOPING TOP TALENT

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### As a consultant and coach...

Radwan Dayib, Communications Strategist at Burns & McDonnell

July 9, 2021, Radwan was a client of Dawn's

I've known Dawn for a little over two and a half years and have had the chance to work with her in a few different capacities. **The one overarching sentiment that comes to mind when I think of Dawn is her innate ability to lead with empathy. She is great at shifting her perspective to meet you where you're at, and lifting you up with words of wisdom, advice, and strength that are uniquely her own.**

From the first moment I had the chance to work with Dawn, it was evident that her personal and professional experiences have shaped her charismatic and energetic leadership style. **What I admire most, perhaps, is how tremendous she is at helping others see the big picture, then charting a path to get to the end goal. While serving as a consultant on a large-scale change management project, I would often turn to her as my "gut-check" and she would always come to the rescue with a detailed and sound plan of attack.**

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### At Spencer Fane...

Phil Bauer, Retired Marketing Executive

November 26, 2016, Phil reported directly to Dawn at Spencer Fane LLP and worked with Dawn at UMB

There are three things that stand out about Dawn that make her excel at moving organizations forward: vision, determination and leadership. To paraphrase another famous leader, she "dreams of things that could be, and asks 'why not?'" She then has the drive and persistence to make them happen. **She consistently drives me to be the best that I can be and has the passion and positivity to inspire our team to succeed. "Can't" is not in Dawn's vocabulary.**

Sam Diederich, Chief of Staff at Spencer Fane LLP

November 19, 2016, Sam reported directly to Dawn at Spencer Fane LLP

Dawn strives to create a supportive and welcoming atmosphere for her team members and engages each of them in developing a shared and meaningful purpose. She enables her colleagues to think critically and creatively about their roles, and she selflessly invests her own time and energy to ensure success for those on her team. **I admire her relentlessly positive outlook, strong interpersonal skills, and her "big picture" thinking.**

Deanna Long, Director of Research & Knowledge Management at Spencer Fane LLP

November 15, 2016, Deanna reported directly to Dawn at Spencer Fane LLP

I have had the pleasure of being on Dawn's team for the last three years. Dawn is a true leader; **her positive driven attitude inspires everyone on the team.** She has assembled a dynamic team that has built a top-notch business development program at Spencer Fane LLP.

Tiffany Scaramucci, Marketing Operations Manager at Spencer Fane LLP  
November 19, 2016, Tiffany reported directly to Dawn at Spencer Fane LLP

I can't express how much I've learned, grown, and enjoyed working with Dawn the last two years. **She has shown me what it's like to have a strong leader and be a part of an exceptional team. Dawn is a great listener and took the time to get to know me and support my personal and professional development.** She's also hilarious and energetic and truly made work fun. Working with Dawn has been an amazing experience and I hope our paths will cross again in the future.

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## At UMB...

Bill Snell, Technical Trainer and Writer  
May 13, 2012, Dawn was senior to Bill but didn't manage directly

It's been my pleasure to work on several teams and projects at UMB under Dawn's leadership. **Dawn has the rare talent to engage a strategic vision, convert it to manageable steps, and then focus attention on the details needed to accomplish each step.** No matter how daunting the task, her positive attitude and enthusiasm will shine through, bringing out the best in each team member. Dawn is an outstanding asset to any team she leads or joins.

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## At Seyfarth Shaw...

Tricia (Smith) Van Pelt, Senior Director, Practice Development & Operations at Seyfarth Shaw LLP  
November 1, 2011, Tricia reported directly to Dawn at Seyfarth Shaw LLP

I was lucky to be part of Dawn's Planning & Development team at Seyfarth Shaw. Dawn was sincerely a pleasure to work for. She made my job fun and exciting while motivating our team to achieve accomplishments, goals and deadlines. Dawn's leadership led to very high team morale, and she built mutual trust and respect with each member of our group.

Our Planning & Development team was new to the Firm when Dawn started in her role. Dawn was able to establish and hire a team that quickly turned into an effective, functioning group within a short time frame. Her outgoing and friendly personality made it easy to relate to Dawn on both a personal and professional level.

Dawn was a good listener and regularly met with me to check in on both my business progress and personal professional development. I always felt like she had my best interests in mind. I am grateful for Dawn's ability to regularly push me to take on new responsibilities and challenges. She always promoted our team to strive to achieve new and higher goals. Her open door policy and approachable demeanor supported her ability to effectively communicate to our team and across the Firm. She was well respected across our organization and was always motivated to take on a new challenge.

If our paths crossed in the future, I would be honored to work with Dawn again. I will always hold her in high regard.

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## HEAR WHAT CLIENTS HAD TO SAY ABOUT WORKING WITH DAWN

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TANUJ GUPTA, MD, MBA  
CERNER VP OF ARTIFICIAL INTELLIGENCE

“I hired Dawn when I was going from a subject matter expert to a role that was responsible for growing the division and accountable for the P/L. I found it to be transformative and would highly recommend executive coaching, especially with Dawn.”

TANUJ VIDEO TESTIMONIAL - [https://youtu.be/3dvZNBJo\\_pQ](https://youtu.be/3dvZNBJo_pQ)



KAREN JOHNSON, PHD  
WASHINGTON HEALTH ALLIANCE  
DIRECTOR OF PERFORMANCE IMPROVEMENT AND INNOVATION

“I hired Dawn when I was moving into a new, highly visible role in a politically complex organization from 2000 miles away. She gave me the confidence to step back and ask the really important questions of myself and others. And most importantly she’s helping me see how I show up which is so incredibly important in a new role.”

KAREN VIDEO TESTIMONIAL - <https://youtu.be/ojx6SM1CjNI>



CHRISTOPHER MOUNTS, CPA  
AVI SYSTEMS, INC. CHIEF FINANCIAL OFFICER (CFO)

CHRIS VIDEO TESTIMONIAL - <https://youtu.be/Lla9ETukfEU>

## PUBLICATIONS, TALK TOPICS, LEADERSHIP RESOURCES & BLOG

### PUBLICATIONS

*Strategy: Models, and Models, and Models, Oh My!*  
*Publication date Nov 10, 2019*

Description: Three-part whitepaper series on strategy, change, and leadership models. This series will demystify the topics, introduce a new model or two, and share practical tips.

<https://www.dawnceleste.com/toolkit/whitepaper-series>



Strategy: Models, and Models, and Models, Oh My!  
 A Dawn Celeste LLC Whitepaper

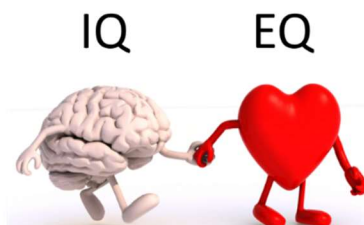


### TALK TOPICS

- Successful Transitions: Your Guide to the First 90 Days of a New Role



- Communicating with Confidence and Credibility
- Client Experience Pillars
- The Hidden Dangers of Decision Making
- Leading with Emotional Intelligence




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Central Exchange, Enterprise University, International Association of Business Communicators, SupportKC, Hollander & Craft, Kansas Business Women's Association, Customer Experience Professionals Association, Chicago Booth Women's Network

## LEADERSHIP RESOURCES

### The Making of a Mind [Book Review].

*Martin Luther King, Jr.: The Making of a Mind*  
September 9, 2018

### One hundred fifty-five years ago.

Juneteenth.  
June 19, 2020

### Social + Emotional Intelligence

IQ, EQ, PQ are all types of intelligence. What do they mean? Let's start with EQ. Here's one model.  
March 1, 2021

### Team Performance Landmines

If you're having trouble inspiring your team to perform, look under the surface for these landmines.  
February 22, 2021

### Trust Equals Eleven.

If you ever thought building trust was hard, just remember it's 11.  
February 15, 2021

### Your Leadership Legacy Exercise

This worksheet will help you think about the legacy you want to leave as a leader.  
February 8, 2021

### Personality Isn't Permanent [Book Review].

Personality Isn't Permanent by Benjamin Hardy PhD.  
June 22, 2020

### Self-Confidence

Learn the 4 C's Formula.  
April 13, 2021

### Culture Questions.

How do you get a glimpse into the company's culture before you take the job?  
April 5, 2021

### Team Goals Template

Leading isn't a solo activity. How do you align your team around common goals?  
March 22, 2021

### What Is - Future State (WIFS) Drill

What is the situation right now? What do you want the future state to be? WIFS will help you get started.  
March 15, 2021

### Listening Tour Toolkit

You're on tour, but your job is not to be on stage. Learn more about listening tours and why they matter.  
March 8, 2021

### Stop being nice?

Is being nice bad? Really? Nope, but kinda.  
July 21, 2021

### Leading and Living with EQ

Leading and Living with Social and Emotional Intelligence  
June 15, 2021

### Communicating with Confidence and Credibility

"You have to prove to your brain that you're more capable and competent than you think." Morin  
May 18, 2021

### 7 Listening Tips

Listening expert Dr. Laura Janusik asks us, "How long can you stay quiet today?"  
May 10, 2021

### Grit or Grace.

Is one of these what you need right now? Or is it something else...  
May 3, 2021

### EQ at Work

April 19, 2021



# BLOG

## DAWNCELESTE.COM/INTERSECTIONS

### INTERSECTIONS BLOG



**Transform.**  
Jun 22, 2022  
Intersection 110 - Transformation Tip



**Challenges.**  
Jun 17, 2022  
Intersection 109 - Challenge



**525,600 minutes.**  
Jun 9, 2022  
Intersection 108 - Tip from HINT



**Whelical is the goal.**  
Jun 2, 2022  
Intersection 107 - Am you whelical?



**April LEAD note from Dawn**  
Apr 26, 2022  
Intersection 280 - April LEAD note



**Shine.**  
Apr 20, 2022  
Intersection 120 - Sometimes we need a new word. Thank you, BJ Fogg!



**Teacher.**  
Apr 12, 2022  
129 - Are you ready for the teacher to appear?



**Ants.**  
Apr 7, 2022  
128 - Ants are the teacher this time.



**March LEAD note from Dawn**  
Mar 29, 2022



**A little off.**  
Mar 23, 2022  
Intersection 116 - AI my friend.



**Lighten up.**  
Mar 17, 2022  
Intersection 117 - St. Patrick's Day inspiration article.



**I wonder.**  
Mar 11, 2022  
Intersection 118 - I wonder when I will...



**Not so little moments.**  
Mar 5, 2022  
Intersection 106 - It seemed like an ordinary question. Was it?



**Appreciation assignment.**  
Mar 2, 2022  
Intersection 105 - Ask if or do not have even one friend we can confide in.



**Grief.**  
Feb 22, 2022  
Intersection 104 - It's hard to know what to do when someone you care about is grieving.



**I don't care.**  
Feb 16, 2022  
Intersection 278 - Make a list.



**Tip for complaining.**  
Feb 12, 2022  
Intersection 288 - Let it out.



**Zoom out.**  
Jan 25, 2022  
Intersection 279 - Zoom out.



**Excited or not?**  
Jan 17, 2022  
Intersection 114- Are you excited about it or not?



**A lot is at stake.**  
Jan 11, 2022  
Intersection 103 - This is big. A lot is at stake. Are you prepared?



**Hold onto your joy.**  
Nov 4, 2021  
Intersection 276 - Hold on and don't let go of the joy.



**The Serenity Prayer.**  
Nov 18, 2021  
Intersection 268 - Grant me the serenity to accept the things I cannot change... I love you, Greg.



**My favorite things.**  
Oct 27, 2021  
Intersection 87 - What are your favorite things?



**Who's on first?**  
Oct 20, 2021  
Intersection 66.5 - Prett clarify this collaboration. Sequence is supreme.



**Nope.**  
Oct 9, 2021  
Intersection 918 - No doing that.



**Pencil's need sharpening.**  
Sep 26, 2021  
Intersection 66.4 - Thought using a pencil would be simplifying things. In a, but pencils need to be sharpened a bit.



**Be careful.**  
Sep 13, 2021  
Intersection 96.4 - Easy peasy... maybe for you.



**Stick.**  
Jul 26, 2021  
Intersection 96.7 - I'm stuck. I need my pencil!



**Sit with it.**  
Jul 12, 2021  
Intersection 94.6 - Be brave and sit with it.



**I love pencils.**  
Jun 21, 2021  
Intersection 91.4 - How about a pencil... and a BIC eraser?