

Summit & Stone Advisory

Strategic people leadership for small and mid-sized businesses

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Why Summit & Stone

Every organization has a summit in view: the place its leaders want to take the business. Reaching it depends on stone, the foundation of people, process, and systems that holds the climb together.

Summit & Stone Advisory works on both. We help leaders get clear on where they are headed, then build the people foundation that makes it reachable.

Who We Serve

CEOs, founders, and COOs of small and mid-sized businesses who need senior HR leadership without a full-time hire. Our clients are often growing past informal people practices, changing systems, or working to get their leadership team pulling in the same direction.

Services

Fractional Chief People Officer

Senior people leadership at a quarter-time or half-time commitment. A steady hand on the foundation, so leaders can stay focused on the business.

- People strategy aligned to business goals
- Policies, processes, and compliance foundations
- Employee relations and leadership coaching
- Recruiting, engagement, and benefits oversight

Paylocity Implementation: Strategic Project Leadership

A new HR and payroll system is foundation work. Set it well, and everything built on it holds.

- Implementation plan, timeline, and clear owners for each workstream
- Process design and configuration decisions
- Data validation and parallel payroll testing
- Manager and employee rollout for strong adoption

Team Workshops

Practical sessions built on Patrick Lencioni's frameworks. Each gives a team a shared language for how they work, where they get stuck, and who they need beside them.

- **The 6 Types of Working Genius:** the work each person finds energizing, and where the team has gaps
- **The Five Dysfunctions of a Team:** trust, healthy conflict, commitment, accountability, and results
- **The Ideal Team Player:** hiring for and developing people who are humble, hungry, and smart

Format	Best for
Half day	An introduction to one framework
Full day	A deeper session applied to the team's real work
Two day	Combining frameworks with team action planning

Leadership Retreat Planning

Time away from daily work to look toward the summit and agree on the route. Includes annual offsites, executive retreats, and strategic planning sessions.

- Agenda design tied to the outcomes leaders need
- Planning, logistics, and facilitation
- A follow-up action plan with owners and dates

Working Genius, The Five Dysfunctions of a Team, and The Ideal Team Player are works of Patrick Lencioni and The Table Group.

Start the Conversation

Every engagement begins with a conversation about where your organization is headed. Reach out for a proposal tailored to your team.

Lauren [Last Name], Founder, Summit & Stone Advisory

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