



HANDS
ON

Hands On Learning

Learning Catalog

Table of Contents

<u>Business Skills</u>	<u>2 - 29</u>	<u>Influencing Skills</u>	<u>44 - 49</u>
Advanced Finance for Non-Finance Managers	3	Conflict Resolution	45
Advanced Innovation	4	Emotional Intelligence	46
Advanced Selling Excellence	5	Executive Presence	47
Advanced Strategic Planning	6	Influencing & Stakeholder Management	48
Agile & Design Thinking	7	Navigating Difficult Conversations	49
Budget & Resource Management	8		
Business Process & Continuous Improvement	9	<u>Leading Others</u>	<u>50 - 65</u>
Cross-functional Collaboration	10	Advanced Coaching	51
Customer Centricity	11	Advanced Leadership Skills	52
Decision-Making	12	Being a Leader	53
Effective Meetings	13	Being an Inclusive Leader	54
Finance for Non-Finance Managers	14	Creating Culture as a Leader	55
Ideation & Innovation	15	Creating Strategic Vision & Aligning Your Team	56
Interviewing Skills	16	Coaching Others	57
Leading Change	17	Delegating & Empowering Others	58
Leading Projects	18	Explicit Expectations	59-60
Marketing 101	19	Leading Hybrid Teams	61
Marketing 201	20	Managing Others	62
Marketing Communications	21	Servant Leadership	63
Personal Time Mastery	22	Team Optimization	64
Presentation Skills	23	The Neuroscience of Leadership	65
Portfolio Management	24	Transitioning into Management	66
Product Lifecycle Management	25		
Risk Management	26	<u>Personal / Professional Development</u>	<u>67 - 72</u>
Root Cause Analysis	27	Career Development	68
Selling Excellence	28	Growth Mindset	69
Setting Goals & Expectations	29	Increasing Resiliency	70
Scaling the Organization	30	Managing Stress & Burnout	71
Strategic Planning	31	Personal Branding	72
Time Management & Organization	32		
Working in Hybrid Teams	33	<u>Technical Skills</u>	<u>73 - 87</u>
		Clinical Operations	74
<u>Communication Skills</u>	<u>34 - 39</u>	Drug Discovery & Development 101	75
Conversational Intelligence	35	Drug Discovery & Development 201	76
Effective Communication	36	Drug Safety	77
Giving & Receiving Feedback	37	GxP	78
Presenting Technical Information	38	Healthcare Compliance	79
Storytelling	39	Healthcare Economics	80
		Market Access	81
<u>Culture</u>	<u>40 - 43</u>	Patient Centricity	82
Diversity, Equity & Inclusion	41	Preparing for IND	83
Mastering Civility	42	Preparing for Phase 2	84
Unconscious Bias & Being an Ally	43	Ramping-up to Phase 3	85
		Regulatory Affairs 101	86
		Preparing for Commercialization	87
		<u>Contact Information</u>	<u>88</u>



Business Skills

Sound business knowledge and good business skills are critical for all roles in an organization, not just those in finance or commercial functions. Increase your effectiveness by expanding beyond your technical expertise and rounding-out your capabilities with business know-how.

Advanced Finance for Non-Finance Managers



Overview

Learn advanced business finance tenets, components, and practices, including key financial metrics and reporting, whether your business is revenue-generating or not.

Learn about:

- The core principles and practices of accounting and profit & loss management
- The various types of financial reporting and their purpose
- How you can contribute to the sound fiscal management of your organization

Key topics covered:

- 4 Main Branches of Accounting
- Essential Reports
- 10 Principles of GAAP
- Balance Sheet - Assets
- Cash Flows - Investing & Financing
- P&L Statement Fundamentals
- Profit & Loss Management

Why this matters?

Whatever your role, particularly as a senior or next-generation leader, understanding the mechanics of financial analysis, measurement, management, and reporting is a critical skill that all business leaders - existing and up-and-coming - should have to effectively contribute to the short- and long-range success of your organization.

Example Content:


The example content includes several slides:

- Essential Reports:**
 - Balance Sheet:** A snapshot of a moment in time for a business to show what it owns and what it owes. It shows the details of assets, liabilities, and equity.
 - Cash Flow Statement:** The revenue and expenses of a period.
- The Role of the Budget:** The role of the budget is to track, direct the strategic direction of the business into realistic goals.
 - A company might have 15% of market share in a particular sector. It may want to increase to 20%.
 - We might want to set a goal for sales in dollars for the period, which would be a product of the increased market share as well as our pricing strategy. Steps would be:
 - Determine total size of market for the period to come.
 - Determine target market share in units.
 - Forecast prices for segments and multiply with units to be sold.
 - Make a clear dollar budget for sales that has the market share strategic goal built into it.
- P&L Statement Fundamentals:**
 - Items:**
 - Direct costs (a large part of the cost of the product). They are expensed when the product is sold (Cost of Sales). They are usually part of the Inventory value.
 - Indirect costs are expensed within the period when they occur.
 - Business Analysis:**
 - It's important to separate the cost of the product from the operational risk of the business to accurately measure the product's profitability.

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Advanced Innovation



Overview

Expand your innovation skills by learning advanced ideation and innovation techniques and approaches.



Learn about:

- How to advance your role and innovation opportunities within your organization
- How to identify appropriate strategic targets for innovation
- How to activate / execute and manage innovation

Key topics covered:



- Innovation Management overview
- Identifying innovation opportunities
- Different innovation models
- Planning and managing innovation



Why this matters?

An organization's ability to innovate is critical to long-term sustained success. Understanding thoughtful and best practice ways to identify opportunities for innovation, develop, and manage these is an invaluable business capability.

Example Content:

The example content includes three slides:

- Innovation Funnel Management Process:** A funnel diagram showing the progression from idea generation to commercialization, with stages like Idea, Concept Development, and Commercialization.
- Project Planning Gantt Chart:** A Gantt chart showing project timelines from Year 1 to Year 5, with various tasks and their durations.
- Strategy Fits Checklist:** A checklist table with columns for 'Idea', 'Concept', 'Project', 'Business', and 'Market', and rows for various criteria like 'Market fit', 'Technology fit', etc.



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Advanced Selling Excellence



Shadi Bucklin has been a Sales Enablement practitioner and leader at multiple high growth companies and most recently served as an Operating VP at a San Francisco based Private Equity firm where she helped portfolio companies improve their operational execution in sales and customer retention to maximize investor returns. She has built this Hands On **Sales Excellence** series to share her proven framework in applying EQ to get the best deals done. This training is highly relevant for anyone who works in sales and business development as well as those who want to develop their sales acumen. The program consists of three interactive Zoom Workshops that address critical techniques in consultative selling and provide adequate opportunity for skill practice and coaching.



Module One: Building the Relationship

Without a relationship built, it's hard to sell anything in today's hyper competitive marketplace. This module will help you learn some tried and true steps to building and solidifying business relationships as the foundation for sales excellence. You will focus your learning on:

Asking probing and clarifying questions to understand who your potential customers are and what they need

Foundational influencing skills to develop and / or strengthen your ability to influence without authority

Proven techniques to transition the budding or existing relationship to opportunities for business deals



Module Two: Qualifying the Opportunity

Once the relationship is built and starting to grow, you can start qualifying the potential and scope for a sale. You will focus your learning on:

Specifying the need, value and urgency for the client / organization

Establishing shared agreement and purpose with the client

Clarifying client-specific details and co-creating action plans with your clients

Negotiating skills and handling objections



Module 3: Closing the Opportunity

By this stage, if you've followed the above steps and sequencing, closing the opportunity to an actual "sale," should be relatively seamless and achievable. At this stage, you are leveraging the relationship and reiterating the qualification of the opportunity to transition to "close." You will focus your learning on:

Framing the solution and focusing your client to what they have already established as the need and appetite for your solution

Advanced negotiation skills to close the opportunity

A simple checklist to help you ensure all key aspects are covered during the "close"

Supplemental tips and techniques (like leveraging emotional intelligence)

Agile & Design Thinking



Overview

Design Thinking is a key framework that helps us think through new strategies, products, services, and ways of working in a creative, customer-centric manner. Agile Methodology has been used for years by high tech organizations to streamline and expedite operations and execution. Today, many other industries have adopted Agile and Design Thinking to improve their strategies, operations, and execution.



Learn about:

- What Design Thinking and Agile are and how they are used in organizations
- How Design Thinking and Agile approaches are used together to create robust strategies and operations
- How to apply Design Thinking and Agile to your strategies and operations



Key topics covered:

- Defining Design Thinking and Agile
- How Design Thinking and Agile work together
- Benefits of using Design Thinking and Agile
- Using Design Thinking to create strategy and/or optimize operations
- Using Agile to execute nimbly and efficiently



Why this matters?

Design Thinking allows you to more critically evaluate your strategies, products, services, processes, and resources. Agile helps you to more nimbly address new or updated strategies, products, services and processes. Design Thinking and Agile are not just for product teams; all teams can benefit from perfecting their strategies and streamlining their operations.

Example Content:

Design Thinking as the Third Way

"Design Thinking has the capacity to address not only how but also how to solve more conventional problem-solving problems. It is not only human-centered, it is deeply human in and of itself. Design thinking is a combination of human-centered design, as well as business models, which is used to create business based on better, scalable, and profitable solutions. The integrated approach of the design thinking process is a key to success."

— Tim Brown, CEO IDEO and Author of Change by Design

Design Thinking and Agile

Design Thinking and Agile	Traditional
	Contract negotiation
	Following a plan
	Documentation
	Deferred business value via longer delivery time

User Stories & Team Backlog

Team Backlog

- User Story 1
- User Story 2

What's going to be acceptable to the User?

- Acceptance Criteria 1
- Acceptance Criteria 2
- Acceptance Criteria 3
- Acceptance Criteria 4

User Story: As a user, I need to be able to register criteria so that I can create test cases for when needed.

Acceptance Criteria:

- User can only add a test case when in a logged state.
- The initial user creation must be on a first trial.
- Subsequent user creation must only be done when there are 200+ records.
- User can only create a test case when in a logged state.
- User will receive an email notification after successful registration.



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Budget & Resource Management

Overview

If you are responsible for planning or managing a budget and/or planning and managing longer-term resource allocation, this program is great to help you understand the different techniques in budgeting and resource planning.



Learn about:

- The importance of effective resource management
- How to identify and plan for the resources you need
- How to forecast resource needs
- Different types of budgeting
- How to develop and manage your budget

Key topics covered:



- Overview on resource and budget management
- Identifying resources to support your work
- Planning for resource management
- Creating budgets
- Managing resources and budgets

Why this matters?

We all deal with resource limitations. Understanding how to proactively plan and allocate resources to achieve your goals is critical to enable goal achievement. Understanding how to budget for your resources and other operating expenses is equally critical, as is effective budget management.

Example Content:

Techniques for Resource Management

- Resource Allocation
- Resource Leveling
- Resource Forecasting

Annual Budget Plan Template

Category	Q1	Q2	Q3	Q4	Total
Office Costs	100,000	100,000	100,000	100,000	400,000
Marketing	150,000	150,000	150,000	150,000	600,000
Development	200,000	200,000	200,000	200,000	800,000
Operations	300,000	300,000	300,000	300,000	1,200,000
Other	50,000	50,000	50,000	50,000	200,000
Total	800,000	800,000	800,000	800,000	3,200,000

RecyX Project Gantt Chart

Project Start: Sat, 4/15/2022

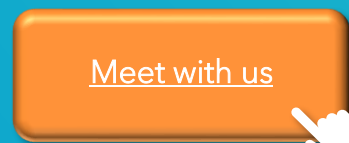
Display Week: 1

Task	Assigned To	Start	End
Final Phase			
Define project and set deliverables	John	3/30/22	3/31/22
Determine tools including tracking	Matt	3/23/22	3/25/22
Work with bank and secure financing	Neil	3/25/22	3/25/22
Obtain licenses	Sharon	3/26/22	4/1/22

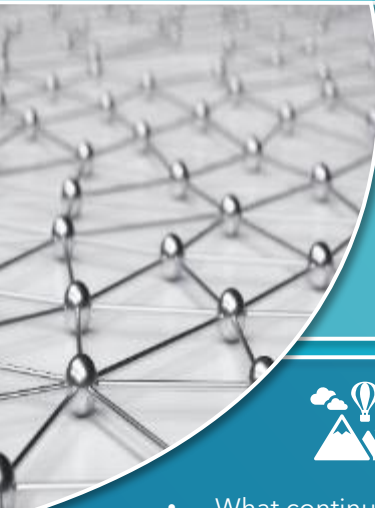
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Business Process & Continuous Improvement



Overview

Learn about the importance, practices, techniques, and tools used to assess and develop opportunities for continuous improvement, including business process re-engineering.



Learn about:

- What continuous improvement really is and how it works
- Derivative forms and different methodologies for continuous improvement
- Steps you can take to identify opportunities for continuous improvement
- How to design and implement continuous improvements



Key topics covered:

- Models for continuous improvement
- Examples of continuous improvement
- Re-Engineering steps, processes, and practices
- Planning improvement implementations
- Managing risks and change



Why this matters?

Organizations and their business operations are constantly evolving, which puts greater emphasis on the need to continuously streamline, improve, and scale our operations. Understanding how to efficiently and effectively approach, define, and deliver continuous improvements is critical to organizational and team effectiveness.

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Cross-Functional Collaboration

Overview

Learn about the importance of optimal cross-functional collaboration and why this is so important in today's business world, as much of the key work done in organizations today is handled by cross-functional teams. Learn how to dissect what other functions do, and how you can optimize your way of working with other functions to achieve the best business and team results.



Learn about:

- What cross-functional collaboration is and why it's critical to organizational success
- Tips and techniques to enhance your cross-functional effectiveness
- How to apply your learning to cross-functional scenarios

Key topics covered:



- Cross-functional Collaboration
- Adaptive Collaboration Model
- Required Skills
- Best Practices

Why this matters?

Cross-functional collaboration has never been more important, as much of the key work done in organizations necessarily pulls on the collaborative effort of a number of functions. Understanding what other functions do, how they interface with your function, and how to optimize these collaborations makes all the difference, not only to your engagement and success, but also the overall team and organization.

Example Content:

Tips for Building Cross-Functional Teams

- Diversity
- Influence

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What is Cross-Functional Collaboration?

Understanding the Pieces of the Puzzle ...

Collaboration is work that functions draw on different all team on goal.

8



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Customer Centricity

Overview

Learn about best practices, techniques and tips to establish and sustain customer centricity as a key differentiator for you and/or your organization.



Learn about:

- Customer centricity and why it matters
- Key steps to achieve and sustain a high-level of customer centricity
- Key techniques to help customers find solutions and understand the value that you / your organization can bring

Key topics covered:



- Defining Customer Centricity
- Understanding Relevant Standards
- Outlining Steps to Achieve and Sustain Customer Centricity
- Helping Customers Find Solutions
- Demonstrating Value

Why this matters?

We all have customers and “competitors” for our customers’ time and attention. One of the key ways that individuals and organizations differentiate from their “competition” is by consistently operating with a customer-centric mindset. Helping your customers solve problems and, therefore, demonstrating your value will set you / your organization ahead of the pack.

Example Content:

What is Customer Centricity?

General Definition

Customer centricity is a business strategy that prioritizes customers and their needs and interests over short-term business goals. It's a mindset that helps organizations make decisions that consider the impact on customers and end-users. The goal is to create a positive customer experience and build long-term relationships.

Our Definition

Client centricity is a company culture focused on outstanding client experiences that foster partnerships and mutual beneficial business. Building trust-based relationships and employee improvement, both internally and externally, to create a client centric culture.

Co-Creation

Direct learning from stakeholders

Quick idea generation & testing

Experiencebased learning

New sources of value creation

Value Partnerships

Stakeholders Leverage on resource diversity

Being a Great Consultant

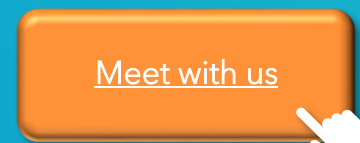
1. Discovery
2. Education and Value Positioning
3. Expectationsetting
4. Conversion
5. Research
6. Presentation of Options
7. Co-Creation and Develop Solution
8. Review and Iterate Solution
9. Implementation
10. Measure and Report Success

Explore Next Steps ...

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Decision-Making

Overview

Learn advanced techniques and practices to help you make better business decisions faster and with improved outcomes.



Learn about:

- The importance of effective decision-making
- Different decision-making styles and traps
- Different techniques to enhance the effectiveness of your decisions

Key topics covered:



- Overview on decision-making
- Decision-making process
- Decision-making skills
- Different techniques to enhance decision-making



Why this matters?

The more responsibility we have, the more choices we have to make and each of those decisions carries consequences, whether good or bad. Understanding when your decision-making style works and when it holds you back is crucial to becoming more effective at decision-making, whether the impact is big or small.

Example Content:

The example content includes several slides:

- Learning from Your Decisions:** Discusses how to learn from past decisions, mentioning that you should consider those situations and how they connect with you or others.
- Intuitive Decision-Making (Heart vs. Head):** Compares intuitive and analytical thinking, noting that intuitive decisions are often based on past experiences, while analytical thinking is based on past experiences and analytical thinking can help you make better decisions.
- Understand Your Decision-Making Style:** A central slide with a checklist of questions to reflect on before making a big decision:
 - What is your preferred style? What are the strengths and weaknesses of this style?
 - When has your decision-making style served you well? When has it limited you?
 - What decision would someone with the opposite style make?
 - Who do you respect with a different style and how would they go about approaching the same situation?
 - What decision-making style is valued by your stakeholders or in your business?



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Effective Meetings



Overview

Learn how to better manage meetings. Meetings can consume a considerable part of our time at work. Given the amount of time we spend in meetings, it's a great investment of your time to learn how to optimize these. We all play a role in ensuring we meet only when we need to, and when we do, we play our part in ensuring our meetings are the most effective possible.



Learn about:

- When and when not to have a meeting
- How to employ best practices in several different kinds of meetings
- How to ensure you and other attendees get the most out of meetings
- How to better manage virtual meetings

Key topics covered:



- Understanding meeting alternatives
- Structuring meetings based on the topic
- Meeting hygiene – pre, during, and post
- Structuring meeting roles and responsibilities
- Tips and techniques to master meetings – in-person, virtual, hybrid, intact team, cross-functional teams



Why this matters?

Meetings consume a considerable amount of time for both the individuals and the business. Being more disciplined and willing to suggest alternatives when meetings are not really needed is a start on the right path. Effective meetings are an opportunity to clarify issues, set new directions, sharpen focus, create alignment, and move objectives forward. But this is true only if meetings are effectively structured and managed to ensure the outcome we seek.

Example Content:

The example content includes three slides:

- Different Types of Meetings:** A table with columns for Meeting Type and Description. Types include One-on-one, All Hands, Project team, Decision-making, Feedback, and Leadership.
- When to Have and Not Have Meetings:** A slide with a checklist for 'Calls or Email' and 'Meetings'.
- Typical Meeting Roles & Responsibilities:** A table with columns for roles: Chairperson, Facilitator, Collaborator, Recorder, Energy booster, Scribe/Note-taker, and Timekeeper. Each role has a list of specific responsibilities.



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Finance for Non-Finance Managers



Overview

If you are **not** in Finance and want to learn about foundational financial processes and practices that underpin business, this program will give you great context into how business finances work, and the role that we can all play in ensuring sound fiscal management of our organizations.



Learn about:

- The general nature and components of business accounting
- Key business financial reporting, their components, and how these are derived
- Business budgeting and forecasting and how to use this to improve your budget and other resource planning skills

Key topics covered:



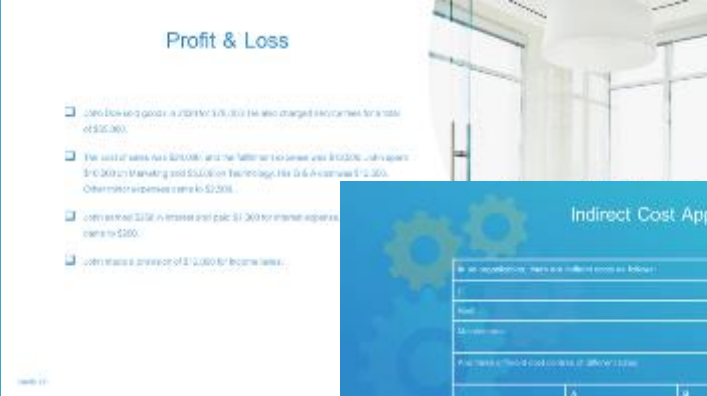
- General business accounting
- Key financial reporting
- Budgeting
- Forecasting



Why this matters?

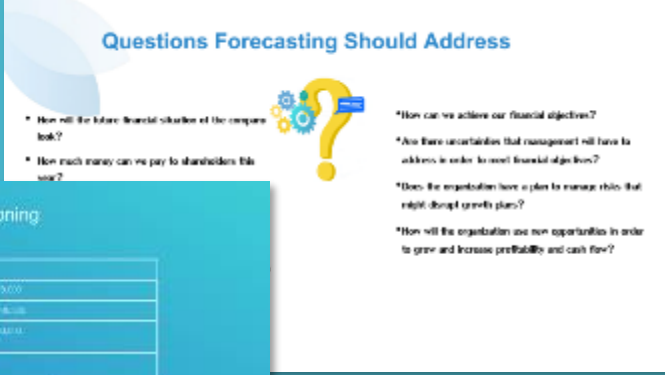
Whatever your chosen field, increasing your knowledge of business financials can only make you that much more effective and successful. Enhancing knowledge of underlying principles and foundational financial processes will provide valuable insights into the mechanics of any organization.

Example Content:




Profit & Loss

- Sales from good product in 2019/20 is 1000000 and changed to 1000000 for a total of \$10,000,000.
- The cost of sales was \$20,000,000 and the selling expenses were \$10,000,000 (sales staff \$10,000,000 Marketing and \$10,000,000 Technology, HR & Admin) so \$30,000,000. Other marketing expenses were \$2,000,000.
- Sales were \$10,000,000 in 2019/20 and paid \$1,000,000 for interest expenses (interest rate 10%).
- Costs were a variation of \$12,000,000 for income taxes.



Questions Forecasting Should Address

- How will the future financial situation of the company look?
- How much money can we pay to shareholders this year?
- How can we achieve our financial objectives?
- Are there uncertainties that management will have to address in order to meet financial objectives?
- Does the organization have a plan to manage risks that might disrupt growth plans?
- How will the organization use new opportunities in order to grow and increase profitability and cash flow?



Indirect Cost Apportioning

At an accounting centre the indirect costs are allocated:

Centre	100,000		
Dept A		30,000	
Dept B			70,000

The total indirect cost costed to all three centres:

	A	B	C
Production	60,000 per unit	70,000 per unit	20,000 per unit
Materials	30	60	30
Labour	300	100	100

How much do you pay for the indirect costs A, B and C?



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Ideation & Innovation

Overview

Learn about the difference and interplay between ideation and innovation. Learn how to structure and run ideation sessions to generate ideas to innovate in your area of the organization and turn ideas into innovation opportunities.



Learn about:

- The relationship and differences of creative thinking, ideation, and innovation
- The impact of ideation and innovation on business success
- How to design and conduct ideation in various aspects of the business
- How to use proven ideation and creative thinking techniques to boost innovation and creativity in your business

Key topics covered:



- Creative thinking, ideation, and innovation - differences and their interplay
- How to ideate to generate innovation opportunities
- How to translate ideas into innovation targets

Why this matters?

Businesses succeed and fail because of their innovation - whether big or small. Rarely does a business simply land on a great innovation target. Instead, great opportunities for innovation are generated through thoughtful, practiced, and recurring ideation. Knowing how to ideate, leverage creative thinking, and translate ideas into action are critical for any business to thrive.

Example Content:

The Business of Innovation
Innovation Success Factors
Please use to improve your performance

1. Measure Innovation Intensity and Accuracy
The best innovators have clear goals to measure the innovation process and track their success to improve the way they innovate.
2. Place Greater Emphasis
65% of the top 10 global innovators focus on engaging customers and on how they work in line with the "lean Startup" and "fail to be good" schools of thought.
3. Adopt Design and Emphasis on Ethics
Organizations that have well-defined business and innovation strategies are more likely to have a higher rate of their innovation reach their goals.

Chart Title

Neuroscience + Creative Thinking

Our brains are designed to create shortcuts which help us to make sense of the world and categorize our experiences and learning.

These shortcuts are called schemas. If you see a cat on the sidewalk, you recognize it as a cat. You can anticipate what its meow might sound like, how its fur might feel if you were to stroke it and how it might be distracted should a mouse cross its path.

You don't need to study it intensely to make these links. Your brain has already registered this information, based on previous learning, for you to draw upon at will.

Pick your Ideation Technique(s)

Ideation

- Flip the Problem
- Random Words
- Worst Possible Idea
- How would Google do it?
- Crazy 8's
- Empathy Mapping
- Mindful R-S-S

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Interviewing Skills

Overview

This program is great for anyone involved in interviewing, as it will help to ensure your interviews are structured to garner the information you need to recommend the best hiring decision for candidates and your organization.

Learn about:

- The importance of effective interviewing skills
- Unconscious bias in recruitment and how to combat this
- Legal requirements in recruitment and hiring
- Interviewing best practice structure and techniques

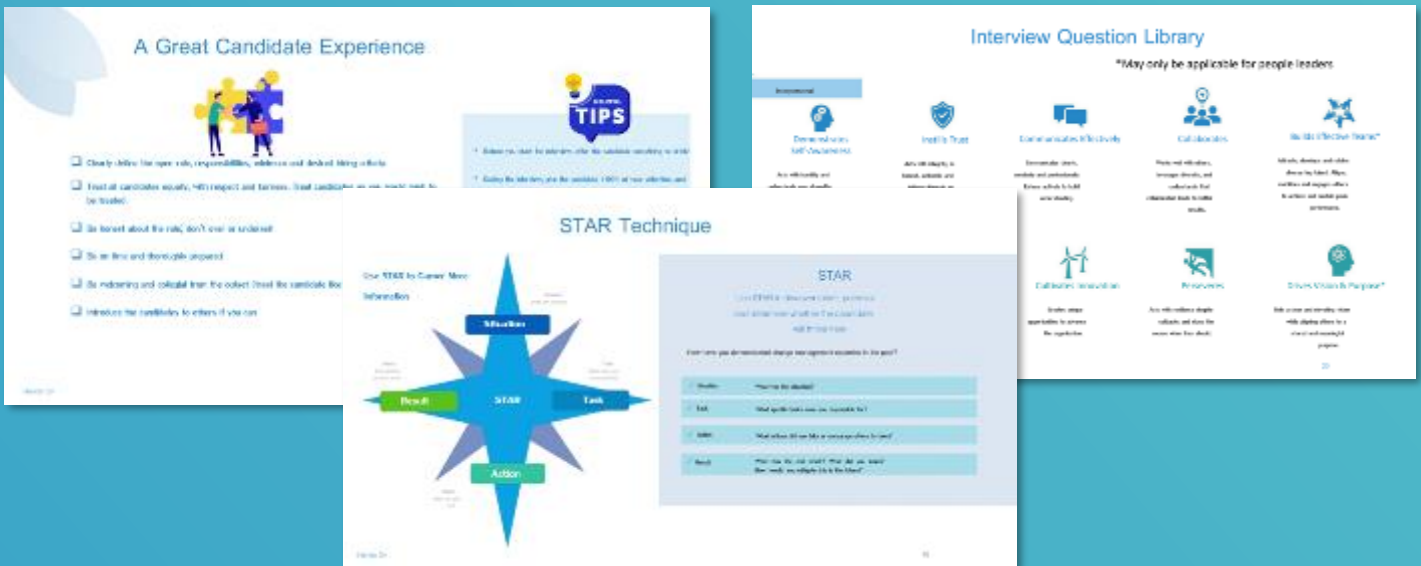
Key topics covered:

- Importance of hiring well
- Unconscious bias
- Interviewing dos and don'ts
- Best practice interview and question structure and techniques
- Giving good candidate feedback and making effective hiring decisions

Why this matters?

Effective interviewing that solicits the information we need to make better hiring decisions, while being legally compliant and avoiding unconscious bias, is imperative to attract diverse top talent as well as avoid inappropriate hiring decisions. Hiring wrongly has been shown time and again to cause significant costs to organizations, whereas hiring well can make all the difference to achieving organizational goals and objectives more effectively and faster.

Example Content:



The example content collage features three main slides:

- A Great Candidate Experience:** A slide with a checklist of best practices for candidate experience, such as 'Clearly define the open role, responsibilities, education and desired living skills' and 'Treat all candidates equally, with respect and fairness'.
- Interview Question Library:** A grid of 10 question categories with brief descriptions, such as 'Behavioral', 'Cultural Fit/Values', and 'Skills & Technical Proficiency'.
- STAR Technique:** A slide explaining the STAR method (Situation, Task, Action, Result) with a star-shaped diagram and a table of example questions for each component.

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Leading Change



Overview

Change in any organization is to be expected. If you are leading an initiative or project that requires change management, such as communicating and educating others on the change, this program will help you understand how to incorporate change management best practices into your work.



Learn about:

- What systemic change management is and why it's so important in organizations
- The many different influences and types of change that occur in organizations
- Structured approaches for ensuring effective planning and execution of change management

Key topics covered:



- Systemic change management
- Different influences and types of initiatives that require a thoughtful change management approach
- Different change management models
- Planning and preparing for change

Why this matters?

Change in organizations is inevitable. Dependent upon the size, scale, complexity, and impact of the change, a structured approach to change management, as a key component of the change implementation plan, often dictates whether a change is successful or not. Preparing leaders and others involved to play their role in effective change management is critical to success.

Example Content:

Lewin's Change Model

Unfreeze

1. Recognize the need for change
2. Evaluate what needs to change
3. Determine the requirements of all stakeholders and all roles
4. Develop a change support plan
5. Manage and coordinate the details and resources

Change

1. Plan the change
2. Execute the change
3. Monitor progress and adjust

Refreeze

1. Plan the change
2. Execute the change
3. Monitor progress and adjust

Resistance to Change

Area of Resistance	Description	Rating
Lack of understanding of the purpose of the program	There may be a lack of understanding of the purpose of the program. There may be a lack of awareness of the need for the change to occur.	1
Lack of support from leaders and all stakeholders	If people perceive that they will not be supported, their actions are not proactively supportive of the program. Their acceptance is limited to survival.	2
Not being in a good mood for the change	Employees do not see the value of the change. They may be in a bad mood for the change. They may be in a bad mood for the change. They may be in a bad mood for the change.	3
Change is not seen as a priority	Employees do not see the change as a priority. They may be in a bad mood for the change. They may be in a bad mood for the change. They may be in a bad mood for the change.	3
Lack of resources and/or people	Employees do not see the change as a priority. They may be in a bad mood for the change. They may be in a bad mood for the change. They may be in a bad mood for the change.	4
Change involves breaking old habits	Change involves breaking old habits. Employees may be in a bad mood for the change. They may be in a bad mood for the change. They may be in a bad mood for the change.	3

Typical Change Management Steps

- 1 Assess**
To begin with, we need to assess the need for change. This is the first step in the change process. It involves identifying the need for change and the current state of the organization.
- 2 Prepare**
After assessing the need for change, we need to prepare the organization for change. This involves identifying the stakeholders who will be affected by the change and developing a communication plan.
- 3 Plan**
Once stakeholders are identified, we need to develop a detailed plan for the change. This plan should include the goals, objectives, and resources needed for the change.
- 4 Implement**
The implementation of the change is the most critical step in the change process. It involves executing the plan and monitoring progress.
- 5 Sustain**
If the change implementation is successful, the next step is to sustain the change. This involves monitoring the change and making adjustments as needed.



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Leading Projects



Overview

Learn best practice approaches and techniques for structuring and managing your projects for ultimate success—whether that’s appointing, onboarding, and managing your project team, aligning your project stakeholders, or day-to-day project management.



Learn about:

- When and when not to conduct a project
- What it takes for your projects to succeed
- How to structure and involve others in your projects for maximum success
- How to effectively and efficiently manage your projects
- How to measure and report project success

Key topics covered:



- Overview of project management
- Why projects succeed and fail
- How to structure your projects
- How to involve and engage others
- How to manage your projects
- How to measure success and close-out projects



Why this matters?

In today’s highly matrixed organizations, a considerable amount of work is accomplished through project teams, which are often cross-functional bringing added complexities to what can already be highly complex projects. Understanding how to leverage best practices, structure projects and project teams for success, and manage to effectively and efficiently complete milestones and meet stakeholder expectations are all critical opportunities that warrant dedicated time to learn these techniques and practices.

Example Content:

The example content includes three main slides:

- Clear Roles & Responsibilities:**
 - Project Leader:** Accountable, Confirms project purpose and desired outcomes, Identifies required resources, Establishes clear Project Team roles & responsibilities, Leads co-creation of Project Team Charter, Leads co-creation of Project Team Roadmap, Leads Project Team meetings, Holds self and Project Team accountable for milestones and deliverables.
 - Project Manager:** Responsible, Is also a standing Project Team Member, May be the same person as Project Leader, Helps structure the project to ensure success, timeliness and high quality, May manage Project Team interactions, such as meetings, communications and followup, Helps keep the Project Team on track to deliver.
 - Project Team Member:** Responsible, Provides specific skills needed to complete the project, Co-creates Project Team Charter and Roadmap, Provides specific project deliverables or components of deliverables, Keeps Project Team and functional area informed of project status and progress.
 - Partners:** Informed, Provides support to Project Team as needed, Receives interim project updates and progress to stay informed.
 - Stakeholders:** (Mentioned but details not fully visible)
- Project Management in Business:** A slide showing a flow from 'Creativity' and 'New Ideas' through 'Experiments' and 'Breakthrough Results' to 'Innovation'. It also lists 'Repeatability', 'Standards', 'Predictability', and 'Quality' as factors. A warning box indicates 'Un-manageable Proportions', 'Unclear Change', and 'Confusion'.
- Project Management Lifecycle:** A detailed diagram showing a 6-step process:
 - 1 Pre Project
 - 2 Starting the Project
 - 3 Organising and Preparing
 - 4 Carrying out the Work
 - 5 Completing the Project
 - 6 Post Project Assessment
 Below the steps are circular icons for 'Idea Generation', 'Scoping', 'Build Business Case', 'Doing & Validating Work', 'Launch', and 'Improve'. The entire process is supported by 'Project Team, Sponsor, Stakeholders and Partners'.



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Marketing 101

Overview

Learn the fundamentals of marketing as a core function of any company, whether it's evaluating and planning for key factors as an organization works toward commercialization, or for a company already out in market. Forward planning and alignment with strategy are key tenets of what marketing functions do, so it's never too early to learn about these processes and practices. You also don't need to be in a marketing or market-facing function to benefit from this program, as all functions deliver a product or service and therefore market their deliverables - whether to internal or external customers.



Learn about:

- The fundamental constructs of the marketing discipline
- The different marketing levers that are used in organizations and their purpose
- How organizations generally market their product / services and how you can leverage this learning for your role



Key topics covered:

- Overview of marketing as an organizational discipline and key business function
- Different marketing strategy and execution models
- Practical applications of marketing methodologies and concepts



Why this matters?

As a core function in any business, understanding how marketing works and its role in the broader organization can benefit every leader and other team members because the work done in all parts of the organization culminates in showcasing the organization's work to its customers. Understanding how this endpoint works can help product, service, and support teams improve the outcomes of their work.

Example Content:



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Marketing 201



Overview

This program is recommended if you have either attended our Marketing 101 program and want to learn more or are just generally interested in advancing your knowledge of the role, practices, and techniques of marketing.



Learn about:

- The role, importance, and techniques used in environmental analysis, market segmentation, and market analysis
- How to create SMART marketing objectives that form the basis the core marketing strategy
- How to leverage marketing and promotional mixes to achieve marketing objectives
- The role of pricing in marketing strategy
- How to manage execution of the marketing strategy

Key topics covered:

- Environmental analysis
- Market segmentation, market share, and market analysis
- Marketing objectives
- Marketing and promotional mixes
- Pricing strategy
- Marketing management



Why this matters?

Marketing is the way that organizations communicate their unique brand and competitive positioning by establishing and reinforcing their value proposition. Every function ultimately touches how an organization is able to market its brand and products. Cross-functional leaders and future marketers can benefit from understanding the role they can play in communicating and positioning the brand and the product portfolio.

Example Content:

Environmental Analysis

Economic State

- Robust economic growth heightens purchase power
- More open economic policies facilitate imports
- Tax reform more beneficial to our kind of business

Legal State

- Legal regulations have become more relaxed
- New regulations in favor of sustainable innovations
- New employment law more beneficial to our business

Ecological State

Political State

Our Market Base & Customers

Total Available Market 5M

90K

30K

5K

We currently limit our Total Available Market to the Greater Los Angeles area, as we're testing newly rebranded products and prefer to start at our HQ.

With our sales and marketing channel, we have historically been able to reach ninety thousand people about our products in available market.

Of those reached, about thirty thousand would be our most likely buyers according to our analysis of this particular demographic.

As it is, we currently have five thousand active users of our product. We hope to triple this number in the upcoming year with our marketing efforts.

Market Share and Competition

16% Our biggest competitor, XYZ Company, has acquired 16% of the market share so far. But this is largely due to the age of its brand name and its abundant resources.

14% For the short number of years, we currently hold a stellar 14% of the total market share.



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Marketing Communications

Overview

Learn the principles, practices, and techniques of one of the most important marketing disciplines for building and evolving brand awareness, adoption, and advocacy – marketing communications – and how you can leverage this for your role and responsibilities.



Learn about:

- The fundamental components of marketing communications
- How to use key analyses to discover the conditions surrounding an organization
- Models that help organizations predict customer perceptions and behaviors
- How to construct and optimize a marketing communications plan and budget

Key topics covered:

- Marketing Communications roadmap
- Environmental influences
- Key analyses
- Elaboration-Likelihood Model
- Brand Positioning Model
- Hierarchy of Effect Model
- Push / Pull strategy
- Marcom Framework

Marketing is the way that organizations communicate their unique brand and competitive positioning by establishing and reinforcing their value proposition. Every function ultimately touches how an organization is able to market its brand and products. Cross-functional leaders and future marketers can benefit from understanding the role they can play in communicating and positioning the brand and the product portfolio.

Why this matters?

Example Content:



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Personal Time Mastery

Overview

Learn practices and techniques that advance your time management, organization, productivity, and fulfillment.



Learn about:

- How the 7 *Habits of Highly Effective People* contribute to effective time management
- How the emotional bank account deposit and withdrawals impact relationships
- What and how to effectively delegate and the different forms of delegation
- How to implement time management best practices and teach them to your team

Key topics covered:



- Habits of highly effective people
- The emotional bank account of relationships
- Time management best practices for people leaders
- Effective delegation
- Healthy time management habits
- Time management tips to teach your team



Why this matters?

Advancing one's ability to optimize time, organization, productivity, and fulfillment is a highly worthwhile activity that will pay significant dividends in both individual and team results.

Example Content:

Circle of Concern

Circle of Influence

Proactive Focus
Positive energy enlarges
Circle of Influence

Time Management Matrix

URGENT	NOT URGENT
I. Activities <ul style="list-style-type: none"> • Crises • Pressing problems 	II. Activities: <ul style="list-style-type: none"> • Prevention, PC activities • Relationship building • Recognizing new opportunities • Planning, recreation
III. Activities: <ul style="list-style-type: none"> • Trivial, busywork • Some mail, some calls 	IV. Activities <ul style="list-style-type: none"> • Trivial, busywork • Some mail, some calls • Time wasters • Pleasant activities

Sharpen the Saw: 4 Dimensions of Renewal

Physical Dimension	Spiritual Dimension	Mental Dimension	Social / Emotional Dimension
The goal of continuous physical improvement is to exercise our body in a way that will enhance our capacity to work, adapt, and enjoy. To renew ourselves physically, we must: <ul style="list-style-type: none"> • Eat well • Get sufficient rest and relaxation • Exercise on a regular basis to build endurance, flexibility, and strength 	The goal of renewing our spiritual self is to provide leadership to our life and reinforce your commitment to your value system. To renew yourself spiritually, you can: <ul style="list-style-type: none"> • Practice daily meditation • Communicate with nature • Immerse yourself in great literature or music 	The goal of renewing our mental health is to continue expanding our mind. To renew yourself mentally, you can: <ul style="list-style-type: none"> • Read good literature • Keep a journal of your thoughts, experiences, and insights • Limit television watching to only those programs that enrich your life and mind 	The goal of renewing ourselves socially is to develop meaningful relationships. To renew yourself emotionally, you can: <ul style="list-style-type: none"> • Seek to deeply understand other people • Make contributions to meaningful projects that improve the lives of others • Maintain an abundance mentality and seek to help others find success



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Presentation Skills



Overview

Learn how to better structure information, data, your message, your call- to-action and more by developing and delivering more impactful and effective presentations.



Learn about:

- The principles for creating and delivering meaningful and impactful presentations
- Various techniques to enable you to create and deliver effective presentations
- How to turn your story into an effective presentation

Key topics covered:

- Presentation dos and don'ts
- Presentation practices and techniques
- Turning stories into presentations
- Optimizing your delivery, audio, visual, and audience impact

Why this matters?

We're constantly delivering or attending presentations at work. Presentations have the potential to move the audience to the action needed and in a way that motivates them. Presentations often fall flat or simply fail to achieve the desired outcome. Improving presentation skills is a must for ensuring communications and required actions [of the audience] are understood, meaningful, actionable, and something your audience wants to commit to.

Example Content:

Presentation Do's and Don'ts

- ❑ Believe that giving a great presentation is a learnable skill
- ❑ Prepare for your presentations
- ❑ Know your audience
- ❑ Use stories to transform your communication
- ❑ Develop a good pre-presentation ritual
- ❑ Follow the structure of great presentations
- ❑ Use repetition, familiar phrases, imagery, and metaphors to transport the audience
- ❑ Have the right emotional appeal to fit your audience
- ❑ Use data to support your presentation
- ❑ Conduct a "dry-run" with a peer, family or friends

Repetition and Audience Connection

What Could Be, What Could Be, What Could Be, New Bliss (New Form)

What Is, What Is, What Is, What Is

Source: Nancy Duarte, Author and Communication expert

Determining Your Storytelling Strategy

L

Logos = Logic

The use of logic, rationality, and critical reasoning to persuade. Logos appeals to the mind. Logos seeks to persuade the audience intellectually.

Some Examples of Logos:

- ❑ Appeal to the heart/emotion
- ❑ Source or testimony
- ❑ Personal anecdotes or stories
- ❑ Personal connections
- ❑ Imagery and figurative language that provokes an emotional response
- ❑ Visual images or words that inspire you to empathize or have compassion towards the idea/topic
- ❑ Powerful words, phrases, or images that stir up emotion
- ❑ Details that come from subjective reporting

P

Pathos = Emotion

The use of emotion and affect to persuade. Pathos appeals to the heart and to one's emotions. Pathos seeks to persuade the audience emotionally.

Some Examples of Pathos:

- ❑ Appeal to the heart/emotion
- ❑ Source or testimony
- ❑ Personal anecdotes or stories
- ❑ Personal connections
- ❑ Imagery and figurative language that provokes an emotional response
- ❑ Visual images or words that inspire you to empathize or have compassion towards the idea/topic
- ❑ Powerful words, phrases, or images that stir up emotion
- ❑ Details that come from subjective reporting

E

Ethos = Ethics and Credibility

The ongoing establishment of a speaker's authority, credibility, and believability as they speak or write. Ethos appeals to ethics and character. Ethos seeks to persuade the audience that the speaker can be trusted and believed.

Some Examples of Ethos:

- ❑ Appeal to the writer's/speaker's believability, qualifications, character, relevant biographical information
- ❑ Use of credible sources (experts, scholars) - and accurate citation
- ❑ Experience and authority: person knows the issues and has experience in the field
- ❑ Appropriateness: knows the audience and context of situation
- ❑ Uses tentative yet authoritative language; avoids sweeping statements like "Everyone is doing this," "This is the only way," Instead says, "The research suggests that," "Some experts believe," "In my experience," etc.

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Portfolio Management



Overview

Expand your project management skills by understanding what it takes to effectively manage a portfolio of projects.



Learn about:

- Using criteria for portfolio selection
- Planning for portfolio success
- Structuring and involving others for maximum success
- Effectively and efficiently managing your portfolio
- Measuring and reporting portfolio success

Key topics covered:



- Projects vs. portfolios
- Requirements and challenges in planning and managing a portfolio of work
- Structuring your portfolio approach
- Involving and engaging others
- Managing your portfolio
- Measuring and reporting portfolio results



Why this matters?

Understanding how to effectively manage a project and all of its components, team members, partners, and stakeholders is one thing. Translating this knowledge into effectively managing a portfolio of projects and understanding what is different and what else is required helps portfolio or multi-project leaders to be successful, which in turn translates into success for the organization for multiple projects.

Example Content:

Portfolio Management Lifecycle

RACI Chart Definition Guide

	Definition	Number of Team Members to Assign
Responsible	Does the work to complete the task	At least 1 per task
Accountable	Delegates the work and is ultimately the last one to review the task or deliverable as it's deemed complete	Limit to 1 per task
Consulted	Provides input based on how the variables impact their future work or provides input based on their domain of expertise	No max or minimum
Kept Informed	Needs to be kept in the loop on project progress, rather than roped into the details of every deliverable	No max or minimum

More on Stakeholders

Who's a Stakeholder?
Anyone impacted by the Portfolio's outcomes.

How to Work with Stakeholders:

- Agree and confirm agreement upfront on desired project outcomes, timing and quality, any watchouts
- Agree cadence and format for interim project updates and progress reporting
- Agree project metrics for success
- Solicit input on project team members and project approach
- Absolutely adhere to cadence and format for interim project updates and progress reporting
- Solicit other input along the way to enhance their engagement and commitment



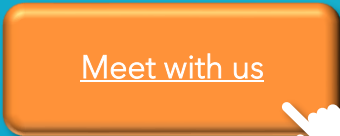
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Product Lifecycle Management



Overview

Whatever your product (which may be a service, such as HR or IT) and whatever your role, understanding the end-to-end process of how products are developed, matured, retired and/or reinvented is a useful skill to have in developing, protecting, and evolving whatever you deliver as part of your role at work.



Learn about:

- The general nature of product lifecycle management (PLM)
- How PLM works
- How PLM contributes to both short- and long-term strategy
- How to activate PLM in an organization

Key topics covered:



- Product Lifecycle Management (PLM) Overview
- Phases / Stages of PLM
- Product Management Functions and Roles
- PLM Techniques



Why this matters?

Understanding end-to-end product lifecycle management concepts, practices, techniques, and tools can help you to ensure that, whatever your product, it is designed and delivered for optimized conditions, while establishing good product health and hygiene through key downstream activities, such as key performance metrics, analysis, reporting, and product iterations.

Example Content:

The example content consists of three overlapping presentation slides:

- Product Development ~ Generating Ideas:** A slide with a blue background and a sun icon, containing several bullet points about product development.
- Integration with Service Lifecycle Management:** A slide showing a process flow diagram with stages: PRODUCT DESIGN, SERVICE DESIGN, SERVICE DELIVERY, SERVICE RETIREMENT, and SERVICE REINVENTION.
- Stages in Product Lifecycle Management:** A slide with a mountain-shaped bar chart and a table below it. The table has columns for PHASES (CONCEPT, DESIGN, DEVELOPMENT, DELIVERY) and rows for various lifecycle stages.



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Risk Management

Overview

Participants will learn how to assess areas of business risk and how to mitigate these through best-practice risk management methodologies and processes.

Learn about:

- What is Risk Management, why it matters, and how it works
- How to identify, evaluate, and mitigate risks
- How to ensure appropriate involvement of all relevant parties
- How to mitigate and manage risk through effective planning

Key topics covered:

- Overview of Risk Management
- Key Risk Management Components
- Identifying and Assessing Risk
- Planning for Risk Mitigation
- Implementing Risk Management Plans

Why this matters?

Proactively assessing and managing risk can be the difference between a successful operation versus an unsuccessful one. Equipping your team members with key methodologies, practices, techniques, and tools to effectively manage risk is an important investment in the success of your business.


Example Content:

Why Risk Management is Important?


- It's easier to spot projects in trouble.
- There are fewer surprises.
- There's better quality data for decisionmaking.
- Communication is elevated.
- Budgets / resource plans rely less on guesswork.
- The expectation of success is set.
- The team remains focused.
- Escalations are clearer and easier.

What is Risk Management?

Risk management is the identification, evaluation, and prioritization of risks followed by coordinated and controlled responses to minimize, monitor, and control the probability and/or impact of adverse events.



New Composition of Corporate Threats

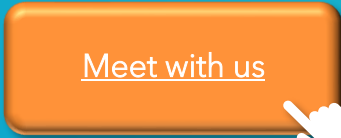


<p>Operational</p> <ul style="list-style-type: none"> • Health & Safety • Asset protection • Executive protection • Physical security • Traveling personnel • Delivery logistics 	<p>Reputational</p> <ul style="list-style-type: none"> • Delivery disruption • Brand attacks • Company controversy • Media & commentary • Social responsibility • Public figure activity • Conferences & events
<p>Cyber</p> <ul style="list-style-type: none"> • Data breaches • Leaked credentials • Phishing • Ransomware • Advanced persistent threats • Illicit sales 	<p>Business</p> <ul style="list-style-type: none"> • International events • Site selection • Market activity • Political environment • Competitive activity • Supply chains

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Root Cause Analysis & RCA Mapping

Overview

Learn the importance of root cause analysis and how it is used in organizations for more robust problem-solving. Learn how to map problems to arrive at root cause issues and determine solutions to address challenges, risks, and opportunities.



Learn about:

- What is Root Cause Analysis (RCA) and RCA mapping
- How RCA can be used to improve business processes, efficiencies and overall business results
- Different ways you can approach RCA in your organization

Key topics covered:



- Defining RCA and RCA Mapping
- Why RCA matters and how it's used in organizations
- Different models for RCA
- Practicing RCA and RCA Mapping

Why this matters?

Root Cause Analysis is one of the core building blocks in an organization's continuous improvement efforts. RCA gives us a better structure to evaluate problems and ensure that the subsequent actions we take not only resolve the core issue, but also address potential risk, as well as enable us to better capitalize on opportunities.

Example Content:

The example content includes three main diagrams:

- Steps Root Cause Analysis:** A circular process flow with four stages:
 - RESULTS & PROCESS EVALUATION (PDSA Cycles)
 - SHARE RESULTS (Meetings/Discussions)
 - DEFINE PROBLEM (Data & Facts)
 - TEST SOLUTIONS & IMPLEMENTATION (PDSA Cycles)
- Fishbone Diagram:** A diagram showing various causes categorized into:
 - JOB EXPECTATION:** No job description, No written guidelines, No procedure for order description, No procedure for collection, No job variety.
 - PERFORMANCE FEEDBACK:** Irregularity of data, Inadequate information, Material scanty, Not enough collected, No feedback.
 - SKILLS & KNOWLEDGE:** Incorrect collection time, Staff not welltrained, No funds, Wrong bloodcoagulant ratio, Unskilled personnel no funds.
 - ENVIRONMENT & TOOLS:** Poor disposable equipment, Poor quality, no funds, Not properly selected, Damaged equipment, Poor maintenance.
 - MOTIVATION:** Staff careless in storage, Lack of motivation, Insufficient compensation, No supervision system, Lack of support in continuous improvement, Insufficient budget.
 - ORGANIZATIONAL SUPPORT:** No supervision system, Lack of support in continuous improvement, Insufficient budget.
- RCA Analysis Example:** A flowchart showing a sequence of events leading to an effect:
 - Root Cause:**
 - Poor prioritization
 - Stayed up late
 - Faulty batteries, cannot control
 - Poor scheduling
 - Team meetings not a team priority
 - Flowchart:** Late for work → Missed the train → Woke up late → Stayed up late → Wanted to binge watch a show → Alarm didn't go off → Forgot to set it → Battery died → Too much work/too many emails → Not considered a priority → Not everyone attends → **EFFECT:** Staff performing unnecessary repeat lab tests.

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Selling Excellence



Shadi Bucklin has been a Sales Enablement practitioner and leader at multiple high growth companies and most recently served as an Operating VP at a San Francisco based Private Equity firm where she helped portfolio companies improve their operational execution in sales and customer retention to maximize investor returns. She has built this **Hands On Sales Excellence** series to share her proven framework in applying EQ to get the best deals done. This training is highly relevant for anyone who works in sales and business development as well as those who want to develop their sales acumen. The program consists of three interactive Zoom Workshops that address critical techniques in consultative selling and provide adequate opportunity for skill practice and coaching.



Module One: Mastering Discovery

To sell your product or service, you must identify a clear set of problems that your customers are facing and incite them to go on the journey to solve those problems. By the end of this module, you will:

Learn how to ask probing and clarifying questions to uncover macro problems and their root causes.

Learn and practice the flow between asking questions and offering insights to enhance credibility and engagement.

Understand the MEDDIC methodology and how it is best applied in various stages of a deal to improve your success rate.



Module Two: Positioning Value

Once you have uncovered a customer's problem, you must demonstrate how your product or service can deliver the desired value to help them achieve their goals. By the end of this module, you will:

Know how to frame a problem and its negative ramifications.

Learn how to map your capabilities directly to your customers' pain points.

Explore how to use pain relief messaging to emphasize loss aversion.

Practice making firm recommendations and aligning on next steps.



Module 3: The Art & Science of Negotiations

Effective negotiation relies on a systemized approach that enables you to get the terms you want on a deal in a relationship-affirming way. Your success in your career and life hinges on your ability to negotiate. By the end of this module, you will:

Practice mirroring and labeling techniques to generate feelings of safety and trust in others.

Learn how to ask calibrated questions to help your counterparts feel in control and receptive to your position.

Experiment using anchors and other proven tools to gain leverage over your counterparts and achieve the best terms on your deals.

Receive a Negotiations Cheat Sheet with a list of approaches and tactics to closing a deal.

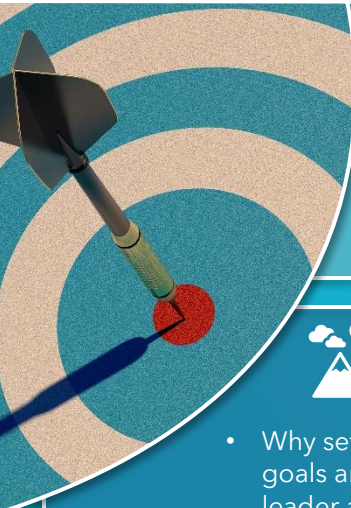
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Setting Goals & Expectations



Overview

If you are a people or team leader, one of the key things you do all the time is set goals and expectations with your team. Learning how to optimize these activities for maximum effectiveness, performance, productivity, and engagement will only enhance your results for both your team and you as their leader.



Learn about:

- Why setting clear, aligned, and elevated goals and expectations is so important as a leader and to your team
- Your role and your team members' roles
- Best practices tips and techniques to increase engagement while holding others accountable



Key topics covered:

- Importance of Clear, Aligned, and Elevating goals and Expectations
- Roles and Responsibilities in Setting and Meeting Goals and Expectations
- Relevant / Related Processes
- Leader tips and techniques



Why this matters?

Setting clear goals and expectations is how leaders set the direction for their teams. Helping leaders understand ways – approaches, techniques, tips, and tools – to optimize their effectiveness in setting goals and expectations can only lead to better business results and higher employee engagement and satisfaction.

Example Content:

Interesting Facts ~ Clear Goals & Expectations

- 01** Setting goals and expectations and reflecting on them improves success.
- 02** Goals are good for motivation and vice versa.
- 03** Setting clear goals and expectations that are challenging yet within one's skill level are a powerful contributor to finding one's path.
- 04** Hope and optimism have significant importance on how one manages their goals.
- 05** Goals that are specific and difficult lead to overall performance improvement.
- 06** People with high efficacy are more likely to set challenging goals and commit to them.

Hands On

Leadership Competencies & Expectations

-  Growth mindset
-  Take initiative
-  Humble
-  Flexible
-  Continuous learner
-  Develop self and others
-  Coach and provide feedback
-  Contribute to an inclusive environment

Hands On

Set Clear Goals and Direction

- Do each of your team members know what they're working on now and why?
- Do they understand the purpose of their work?

10



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Scaling the Organization



Overview

Participants will learn key techniques to forward plan the growth and evolution of the parts of the business for which they are responsible.

Learn about:

- What scaling really is and what's required
- Why scaling the organization is so important, and yet challenging to achieve
- Steps you can take over and over again to scale your organization and build in scaling to product/ service design

Key topics covered:



- Growth vs. Scaling
- Importance of Scaling
- Challenges of Scaling
- How to Scale

Why this matters?

Understanding how to design and scale your business is critical for all leaders in that it ensures that you don't oversize your organization nor undersize and therefore adversely affect your readiness for growth. Equipping your business leaders with skills to plan and design the infrastructure they manage is an investment not only in their leadership capabilities but also in the future readiness of your organization to continue to grow and capitalize on future opportunities.

Example Content:

Infrastructure Considerations

Actions an organization plans to differentiate from others

Formal and informal procedures that support the strategy and structure

Organizational Culture: The dominant values, beliefs and norms which develop over time

Leadership Style: More a matter of what leaders do than what they say; how do leaders act and spend their time?

Guiding concept around which an organization is built - must be simple, usually stated at abstract level

STRATEGY | **STRUCTURE** | **SYSTEMS** | **SKILLS**

Basis of specialization and coordination influenced primarily by strategy, size, and diversity of the organization

The distinctive competencies - what the organization does best

Hands On

When designing your organization, consider the following:

- What is the aggregate / overall responsibility of your team?
- How are these responsibilities currently managed by your team? Who does what currently?

What technology, processes or practices do we need to use to implement, execute and measure our strategy?

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Shared Values
Which of our principles helps us? Why do we do what we do in the way we do it?

How should we help our leaders grow? How do we attract the talent we need?

What leadership style and cultural qualities will help us achieve our strategic objectives?

What are the specific skills that will help us? What skills do we need to develop?

How should we differentiate our organization? What problems might we also need to solve?

What structure do we need to execute the strategy?

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Strategic Planning



Overview

Learn the difference between strategic thinking and strategic planning as well as key models to consider when building strategy. Learn how to translate strategy into a strategic plan that enables your strategy to be achieved.



Learn about:

- The difference between strategic thinking vs. strategic plans
- Different models and concepts you can use when developing a strategy and strategic plan
- How to translate your ideas into a strategic roadmap
- Systemic considerations to better enable strategy achievement



Key topics covered:

- Strategy vs. strategic planning
- Developing strategy and strategic plans
- Systemic factors and considerations
- Developing a strategic roadmap
- Translating strategic roadmaps into executable plans



Why this matters?

Whatever the level of position, everyone can benefit from understanding how to think more strategically and create more achievable strategies and strategic plans to realize strategic goals and objectives. Trying to identify and execute strategy without a structured approach is likely to generate lackluster results at best.

Example Content:

Zoom Out on Strategy
Porter's Five Forces Analysis

- Number of suppliers
- Size of suppliers
- Uniqueness of service
- Ability to substitute
- Cost of change

Supplier Power

- Time and cost of entry
- Specialist knowledge
- Economies of scale
- Cost advantages
- Technology protection
- Barriers to entry

Threat of New Entry

Competitive Rivalries

Threat of Substitution

- Substitute performance
- Cost of change

Why Strategic Planning is Important

Strategic planning is important to an organization because it provides a sense of direction and outlines measurable goals.

Strategic planning is a tool that is useful for guiding day to-day decisions and also for evaluating progress and changing approaches when moving forward.

In order to make the most of strategic planning, careful thought should be given to the strategic objectives being sought, and then the realistic actions that can be taken to support achievement of such objectives.

Strategy & Strategic Planning Process

ARE WE GETTING THERE ?

WHERE ARE WE ?

WHERE COULD WE BE ?

WHERE DO WE WANT TO GO ?

ENHANCED FUTURE IN 520 YRS



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Time Management & Organization



Overview

Learn different tips, techniques, and practices that optimize your time management and organization, enabling you to realize greater effectiveness and efficiencies at work and likely beyond.



Learn about:

- How to optimize your time through certain practices and organizational skills
- How to prioritize your work to optimize effectiveness and efficiencies
- Tips and techniques that you can apply immediately to get more out of your time

Key topics covered:



- Benefits and impact of time management and organization
- Tracking and analyzing your time
- Prioritizing tasks by urgency and importance
- The important role of goal setting
- Scheduling your time
- Good time management and organizational practices



Why this matters?

Time is a precious commodity and, once used, something we can't get back. Learning how to optimize your time, your organization, and increase your effectiveness and efficiencies will garner significant return on investment by creating better work results with better work-life balance.

Example Content:

How You'll Benefit From Better Time Management

- Accomplish More in Less Time**
Using your time effectively means that you're able to accomplish more in a shorter period. Time management skills can reduce the cognitive load or effort involved in completing tasks. So, you can work smarter—not harder.
- Reduce Stress**
Planning and organizing your day effectively can reduce your anxiety about your ability to complete your tasks.
- Create More Free Time**
Time management can also give you more free time. By being more efficient with your time, you can improve your work-life balance. There's more time to spend with family and friends.
- More Opportunities to Reach Your Life Goals**
Managing time well leads to more opportunities. By being more efficient with your time, you can better able to prioritize and schedule work to achieve your goals and objectives.
- Live Your Values**
Being in control of your time also allows you to spend more time with people that matter most to you. Live your life on your terms, at work and at home.

The Four D's of Time Management

- Delete** Learn to say "no" and carefully filter your to-do list. You should delete clutter work—such as junk mails and nonvital meetings—to make room for core matters.
- Delegate** Delegate tasks that require your specific skillset. Reassigning work is one of the most effective strategies of time management if the new person-in-charge has the skills to fill the needs.
- Do** Do not time sensitive. Whether it's a new request or a project deadline, work that can be postponed in favor of immediate tasks.
- Focus** Focus on tasks immediately and focus your attention on one at a time.

SMART Goals

S Specific <ul style="list-style-type: none"> • State what will be accomplished • Use action words 	M Measurable <ul style="list-style-type: none"> • Provide a way to evaluate • Use metrics or data targets 	A Attainable <ul style="list-style-type: none"> • Within a reasonable scope • Relevant to my role, capabilities, and values 	R Resources <ul style="list-style-type: none"> • Time, budget, or other resources needed • People I need help or other support from 	T Time-bound <ul style="list-style-type: none"> • State when the goal should be completed • Be specific on date or timeframe
---	--	--	--	---

Working in Hybrid Teams



Overview

Hybrid teams are becoming the norm in the post-COVID and ever-increasing digital world. Yet, there are many challenges working in teams and fulfilling our professional and career goals when we mix remote and on-site working. Learn how to better cope and manage these changes to ensure optimal team collaboration, while ensuring you're working productively toward your development and career aspirations.



Learn about:

- The nature and needs of hybrid teams
- How to best engage, communicate, and meet with others in a hybrid team environment
- How to ask for direction
- How to continue to develop your capabilities and realize your career aspirations



Key topics covered:

- What's different in the hybrid team environment
- Working most effectively in the team
- Setting productive goals and work plans
- Playing your part in effective communications and meetings
- Developing your capabilities and career



Why this matters?

While a mix of working remotely and onsite has many benefits, the mix presents certain challenges that require us to re-think how we approach our goals, schedules, workloads, and interactions and communications with the team. This is important to remain connected, engaged, achieving our goals, while balancing work / life and continuing to develop our capabilities and careers.

Example Content:

Sprints
Using Agile project management methodologies, projects are broken down into sprints or iterations. These are short, repeatable phases, typically one to four weeks in length. Each sprint should result in a draft, prototype or workable version of the final project deliverable.
The purpose of sprints is to break down a project into bite-sized chunks. This enables the team to plan a single sprint at a time and adapt future sprints based on the outcome of the sprints already completed.
While the planning occurs at the beginning of each sprint, the number of sprints should be determined at the beginning of the project. Sprints are typically the same length.

User Stories - Online Food Delivery

Sprint 1	User Registration	Search	Filtering Results	Required information for Registration
Sprint 2	User Login	Search Result in a List View		
Sprint 3	Profile Page	Retrieve password	Download Mobile Application	

What's Different?

Before:

- ☐ Extemporaneous check-ins
- ☐ Better understanding of nonverbal communication

Now:

- ☐ The need to schedule everything
- ☐ Missed understanding via Zoom
- ☐ Delays due to technology or power
- ☐ Background noises and disruptions
- ☐ We're in mixed situations - some at the office, some remote
- ☐ Blurred lines between work and non-work hours

Different Types of Teams

- Co-located Teams**
Co-located Teams work together in the same physical workspace.
Co-located Teams used to be the norm. They are now the exception.
- Virtual Teams**
Virtual Teams are close to, if not fully, made-up of remote team members. This means that coworkers routinely connect and collaborate through virtual channels, like video conferencing, messaging platforms like Slack, and virtual collaborative workspaces like Google.
- Hybrid Teams**
Hybrid Teams have a mix of co-located and remote team members.
There are also hybrid people who work partially onsite and partially offsite.

Our goal is to have hybrid people with co-located teams when appropriate, i.e., everyone onsite on Tuesdays to meet face-to-face, and virtual teams for check-ins.



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Communication Skills

How we communicate with others at work is foundational to our effectiveness in both work results and relationships. Given the fundamental and enduring nature of communication - something we do every day and all day long - it's critical to continually explore and expand how you approach communications with others, whatever the format.

Conversational Intelligence



Overview

Learn about the neuroscience behind the communications we have with others as a way to significantly up-level your approach to all forms of communication - written, verbal, presentations, and more - and the results you're able to achieve with a more advanced approach.



Learn about:

- What Conversational Intelligence is and why it matters
- Why conversations often fail to achieve desired results and relationships
- Why we converse and interact with others the way we do - the science behind this
- How to build trust with others as a foundation for higher-level conversations
- How to up-level our communications, results, and relationships

Key topics covered:

- The purpose and nature of conversational intelligence
- Different levels of conversations
- The neuroscience behind our conversations
- Trust as a basis for conversational intelligence
- Resolving conflict
- Getting to higher-level conversations



Why this matters?

Everything we do is based on the quality and effectiveness of the conversations we have at work and elsewhere. Yet very little attention is paid to this fundamental activity that often dictates whether we're successful in achieving goals, working well with others, and many other outcomes.

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Effective Communication



Overview

Learn how to improve your capabilities to have more constructive and productive communications with others at work. Learn how to leverage different platforms to tailor your communication needs to best fit the needs of your audience - your team members, your manager, partners, stakeholders, and more.



Learn about:

- Why effective communication is critical to your success and the success of your organization
- How to structure your communications for better impact
- How to tailor your communications to best meet the needs of your audience
- How to effectively incorporate audio and visual aides



Key topics covered:

- The business imperative for effective communications
- Common pitfalls in workplace communications
- Determining your message
- Understanding your audience
- Structuring your communication for maximum impact



Why this matters?

How we communicate with others at work is critical to our effectiveness in both work results and relationships. Increasing the effectiveness of our communications helps us ensure clarity of the message, requests of others, and expectations for the role we and others play, as well as increases the likelihood of mutual commitment and better understanding among the parties.

Example Content:

Common Pitfalls

- We adopt a one-size fits all approach
- We don't pay enough attention to tone
- We speak more and listen less
- We need to be heard versus understood
- We avoid difficult conversations
- We react instead of respond
- We assume we have been understood and that we understand the other person
- We need to be right and the other person wrong



Communicating with Impact

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-
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Fine-Tuning Your Communication

- Return to the Communication you prepared earlier
- Test your work so far against the 7Cs of Effective Workplace Communication
- Where can you fine-tune?



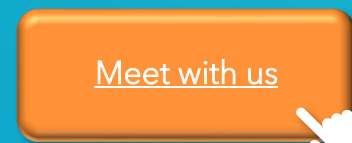
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Giving & Receiving Feedback



Overview

Learn how to improve your abilities to give good feedback as well as receive feedback in a constructive and productive manner. Feedback is constant; it's how we give it, receive it, and process it, that makes all the difference.



Learn about:

- The importance of giving and receiving feedback effectively
- When and how to give feedback effectively
- How to receive feedback in a constructive and productive manner

Key topics covered:



- Importance of feedback
- Roles and responsibilities in feedback
- IDEA Feedback Model
- Examples and practice sessions



Why this matters?

Feedback is how we learn and grow as individuals, teams, and an organization overall. Feedback that is structured well, given timeously and frequently, increases our engagement and collaboration, develops our capabilities, and helps drive and motivate us to achieve our individual, team, and organizational goals.

Example Content:

The example content includes several slides:

- When to Ask for or Give Feedback:** A slide with a list of bullet points regarding when to give feedback, such as "After completing a task or work in progress" and "When you have your efforts (including presentation, writing, or work products, etc.)."
- Practicing Feedback:** A flowchart showing a cycle of giving and receiving feedback. It includes steps like "Pick a partner", "Pick 3 scenarios", "Make an action plan", "Give the feedback to your partner", "Receive it", "Pick a different scenario", and "Give it", with a "Repeat Above" instruction.
- Effective vs. Ineffective Feedback:** A comparison slide. The "Effective Feedback" side lists characteristics like "Given in private and in person", "Clear and concise", and "Specific". The "Ineffective Feedback" side lists characteristics like "Given in public and in person", "Vague", and "No clear action following feedback".



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Presenting Technical Information



Overview

Learn how to better structure information, data, your message, your call-to-action and more by developing and delivering more impactful and effective presentations.



Learn about:

- The principles for creating and delivering meaningful and impactful presentations
- Various techniques to enable you to create and deliver effective presentations
- How to turn your story into an effective presentation

Key topics covered:



- Presentation dos and don'ts
- Presentation practices and techniques
- Turning stories into presentations
- Optimizing your delivery, audio, visual, and audience impact

Why this matters?

We're constantly delivering or attending presentations at work. Presentations have the potential to move the audience to the action needed and in a way that motivates them. Improving presentation skills is a must for ensuring communications and required actions [of the audience] are understood, meaningful, actionable, and something your audience wants to commit to.

Example Content:

Structure for Presenting Technical Information

- What was the goal of the work?
- Who was involved? (keep it light)
- Why is this important to achieve?
- Why should the audience care about this? What's the relevance to them?

Beginning

- What has been achieved so far? Actual c date.
- How have th been accom light)

Middle

Hands On

Power of Stories in Presentations

Determining Your Storytelling Strategy

- You have your Objective
- You have your Message
- Before you build your Story, consider how you will appeal to your Audience ...

Logos = Logic

The use of logic, rationality, and critical reasoning to persuade. Logos appeals to the mind. Logos seeks to persuade the audience intellectually.

Pathos = Emotion

The use of emotion and affect to persuade. Pathos appeals to the heart and to one's emotions. Pathos seeks to persuade the audience emotionally.

Ethos = Ethics and Credibility

The ongoing establishment of a speaker's authority, credibility, and believability. Ethos appeals to ethics and character. Ethos seeks to persuade the audience that the speaker can be trusted and believed.

What Could Be

New Bliss (New Form)

What Is

What Is

source: Nancy Duarte, Author and Communication expert

12

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14



Storytelling

Overview

Learn how to use storytelling as a powerful technique in communicating with others, including using storytelling in presentations.



Learn about:

- How storytelling can advance our business, performance, engagement, and satisfaction
- How to create your own stories
- Techniques that help you deliver stories with impact

Key topics covered:



- What is Storytelling
- Why storytelling matters
- Elements of a story
- Structure for stories
- Preparing your story
- Techniques to deliver your story

Why this matters?

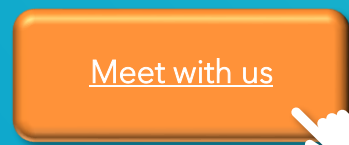
Business decisions are not solely based on logic. Data is often not memorable, but when you tell a story with your data, you create a shared human experience. Storytelling can translate dry and abstract data into a compelling picture. Stories engage your audience beyond facts, which activates more parts of the brain and makes them easier to remember.

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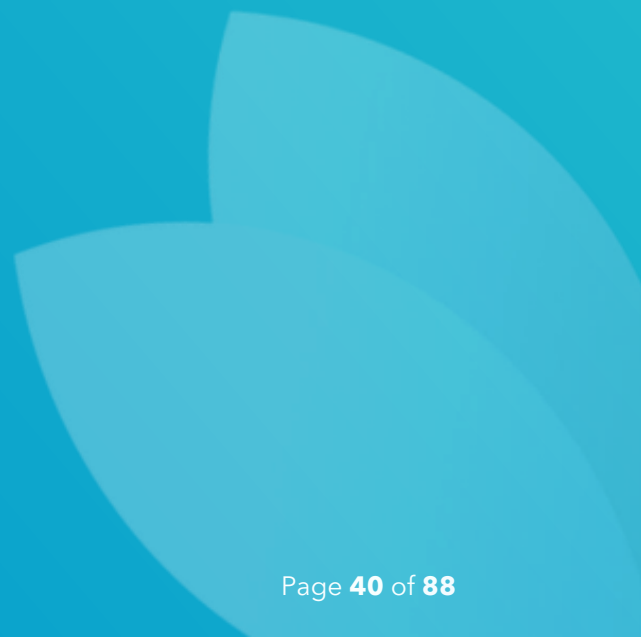
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Culture

Culture is often defined as “how we do things around here.” Culture is also often pointed to as the “glue” that binds the people in the organization together to achieve shared goals and objectives. Learning about key tenets that form and bolster the culture of your organization will help you play your important role in building and sustaining your organization’s culture.



Diversity, Equity & Inclusion



Overview

Learn key insights into the nature and evolution of diversity, equity, inclusion, and belonging in organizations. You'll also learn more about unconscious bias, how to combat this, and how to be an ally to others.



Learn about:

- What DE&I is
- Why DE&I is a business imperative
- How organizations have evolved DE&I over the years
- What you can do to support DE&I in your organization



Key topics covered:

- Defining DE&I and its importance
- DE&I historical progression
- Generational diversity
- Combating unconscious bias
- Being an ally



Why this matters?

Diversity, equity, inclusion, and belonging, when embraced with the commitment to do the right thing and the very best thing for others every day, are hallmarks of a great work environment where all can thrive and bring their best selves to work. We all play a key role in creating an environment that embraces these important organizational tenets.

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Mastering Civility



Overview

Learn the principles of workplace civility and how these form the basis of a diverse, equitable, and inclusive workplace. Learn the role that you can play, such as sharing resources, recognizing the contributions of others, expressing gratitude, and providing timely, specific, fair, balanced, and actionable feedback.



Learn about:

- Why effective relationships at work matter
- Practical ways to enhance your relationships at work
- How you can influence effective work relationships in your organization

Key topics covered:



- Why relationships matter
- The benefits and impact of good relationships at work
- How to build workplace relationships
- Addressing incivility



Why this matters?

Workplace conflict can have significant costs for organizations in the form of lost productivity, lower engagement and commitment, absenteeism, and turnover. Understanding and playing our role to create a positive, productive, fair, and inclusive work environment ultimately makes us a better overall team and organization.

Example Content:

The example content includes three slides:

- Lift the Team Up:** A slide with a list of bullet points about interview techniques and candidate behavior.
- Addressing Incivility:** A slide with a title and introductory text about handling incivility in the workplace.
- Model Email and Conversational Etiquette:** A slide with a table comparing 'Do' and 'Don't' practices for communication.

Do	OR	Don't
Send an email when you're angry, stressed, upset or frustrated		Do concise, use proper grammar, punctuation and spelling
Be easily offended in the workplace		Copy only those who need to be copied
Send an email when the conversation is better addressed face-to-face or over the phone		Hi/Hello All unnecessarily
Use soft language, writing in a respectful tone and valuing the other party's time		Fail to respond to your emails
Include a clear subject line		Include something in an email that you wouldn't see in person
		Use humor and sarcasm



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Understanding Unconscious Bias & Allyship



Overview

Learn the different types of workplace bias and how these can creep in, how to combat biases, and be an ally to others. Recommended as a follow-up to Diversity, Equity & Inclusion.



Learn about:

- How to recognize unconscious bias
- Proactive ways to combat unconscious bias
- What is allyship and how to increase your allyship of others

Key topics covered:



- What is unconscious bias
- What creates unconscious bias
- How to combat unconscious biases
- Increasing your allyship

Why this matters?

To truly combat unconscious bias, we must consider not just the different causes and manifestations of bias, but also the systemic and structural issues that allow biases to be perpetuated. Beyond combatting biases, acting as an ally to others is equally critical to creating and sustaining a great work environment for everyone.

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Influencing Skills

The ability to influence without authority has been consistently shown through research to be among the key attributes of successful professionals. If you want to enhance your abilities to influence others at work, there are a variety of skill-building programs you can explore.

Conflict Resolution



Overview

Learn the different conflict styles and strategies to handle conflict to determine the best route for each situation you may encounter. If we accept that conflict is a natural part of being in interaction with others, and we adopt an approach that says we can come out of this stronger together, then conflict will lead to good, and we'll be able to deal with it with less stress and anxiety



Learn about:

- What conflict really is and why it occurs
- Different styles and preferences for resolving conflict
- Risks and benefits of different conflict resolution styles
- How to apply a collaborative approach to resolve conflict

Key topics covered:



- Understanding conflict
- Conflict styles
- Six C's of collaboration
- Coping and resolving techniques



Why this matters?

Conflict shouldn't be avoided, as it invariably happens. Whatever your natural reaction to conflict is, we can find ways to alter our reaction for better relationships and results. Conflict can lead to good when it produces change or promotes unity and collaboration.

Example Content:

A Model of Influence

Attitudes Beliefs

Shared Goals

ABUNDANCE

Competing

Uses:

- When quick, decisive action is vital, e.g., emergencies
- On important issues where unpopular courses of action need implementing, e.g., cost-cutting, enforcing unpopular rules, discipline
- To protect yourself against people who take advantage of noncompetitive behavior

Six C's of Collaboration

- Clarify
- Communicate
- Common Interest
- Create
- Cooperate
- Conclude



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Emotional Intelligence



Overview

Emotional intelligence is consistently rated as highly important to one's professional success, if not more important than IQ. Learn the fundamentals of emotional intelligence and how you can increase this to enhance your work results and relationships.



Learn about:

- Why emotional intelligence matters
- The pillars of emotional intelligence and how these can show-up at work
- How to enhance your emotional intelligence

Key topics covered:



- What is emotional intelligence
- How EQ is different to IQ
- How emotional intelligence plays a critical role in your success
- How to interpret emotional intelligence in the work environment
- Strengthening your emotional intelligence

Why this matters?

EQ has been consistently rated as more important than IQ, and yet so few people understand how to truly build their emotional intelligence as a key capability. Emotional intelligence is often the difference between being understood, understanding others, and working collaboratively in a way that we all succeed as a team and organization, or not.

Example Content:

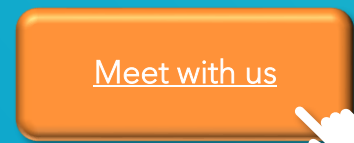
The example content includes several slides:

- 5 Pillars of Emotional Intelligence:** A slide with five pillars: Self-awareness, Self-regulation, Motivation, Social awareness, and Relationship management.
- Adjust Your Listening & Awareness:** A slide with a hand gesture icon and text about listening and awareness.
- Engaging With Others:** A slide featuring a circular diagram with 'HOW TO APPLY EI' in the center, surrounded by four quadrants: Self-Awareness, Self-Management, Social Awareness, and Manage Relationships.
- How to Increase Your Emotional Intelligence:** A slide with a list of tips and icons, including 'Practice active listening', 'Be curious, not judgmental', 'Use 'I' statements', 'Practice self-regulation', 'Be aware of your own emotions', 'Practice empathy', and 'Be a good role model'.

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Executive Presence



Overview

Learn different ways to enhance your capabilities and confidence when interacting, communicating with, or presenting to senior management.



Learn about:

- What executive presence is and why it matters
- The key attributes that influence executive presence
- Specific tips to enhance your executive presence
- How you can develop an action plan to implement your learning

Key topics covered:



- Defining executive presence
- Key components of executive presence
- Steps to build and enhance effectiveness when interacting and communicating with senior management

Why this matters?

Communicating, collaborating, and influencing at different organizational levels can require different approaches, which may in turn require slight adaptations in how we tailor our communications, deliver presentations, and conduct meetings. Understanding what's typically different at senior management levels can help you increase your effectiveness.

Example Content:



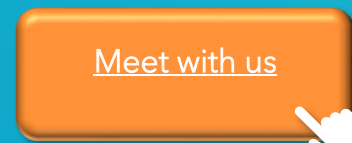
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Influencing & Stakeholder Management



Overview

Learn how to improve your influencing skills with others at work – whether your peers, manager, partners, or stakeholders. Beyond influencing, learn how to structure your approach to different stakeholders, increase stakeholder engagement, and effectively manage your stakeholder relationships.

Learn about:

- How influence differs from persuasion and when to use
- How to enhance your influencing skills
- How to analyze your stakeholders' needs and interests
- How to better engage and sustain engagement of your stakeholders
- How to effectively manage your stakeholders

Key topics covered:

- Influence vs. persuasion
- Behaviors of great influencers
- The role of emotional intelligence
- Stakeholder analysis and mapping
- Stakeholder engagement
- Stakeholder relationship management

Why this matters?

Our ability to influence others without authority is critical to getting things done well at work while building and sustaining important relationships. Equally, most of our work involves stakeholders – those who are highly invested in the outcomes of our work. Ensuring that we know who our stakeholders are, how to best engage and manage the relationship with them, greatly determines whether our work is ultimately successful.

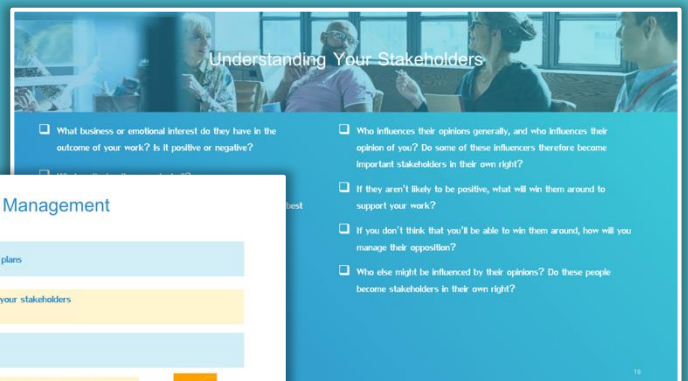
Example Content:



Attributes of Great Influencers

- ✓ They know their topic
- ✓ They know themselves – how they best interact with others
- ✓ They know their audience – who they are, what they need and what they care about
- ✓ They do what they said they would do
- ✓ They are consistent
- ✓ They are honest and trustworthy
- ✓ They care about their audience – delivering what they need when they need it
- ✓ They routinely remind their audience of their stated needs and interests

Hands On



Understanding Your Stakeholders

- What business or emotional interest do they have in the outcome of your work? Is it positive or negative?
- Who influences their opinions generally, and who influences their opinion of you? Do some of these influencers therefore become important stakeholders in their own right?
- If they aren't likely to be positive, what will win them around to support your work?
- If you don't think that you'll be able to win them around, how will you manage their opposition?
- Who else might be influenced by their opinions? Do these people become stakeholders in their own right?

Hands On



Best Practice Stakeholder Management

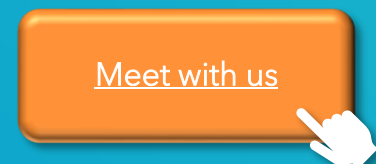
- Embed the agreed communication / update cadence and format into your project plans
- Create a template for sharing information and updates and see if that works for your stakeholders
- Stick to the agreements for progress updates and status
- Keep stakeholders lightly informed of key events or milestones outside of formal communication cadence
- Ask for advice, help or input well before deadlines are due
- Create an environment where your stakeholders feel invested in the process; not just recipients of information

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Navigating Difficult Conversations



Overview

This program will help you learn how to approach more challenging conversations with greater ease, comfort, and confidence, and generate better overall outcomes from your communications and interactions with others.



Learn about:

- The importance of effective conversations
- How neuroscience plays a big role in how we converse and relate to others
- How to navigate difficult conversations and increase your effectiveness and satisfaction

Key topics covered:



- Importance of effective conversations
- Neuroscience of conversations
- Navigating difficult conversations for better outcomes



Why this matters?

Conversing with others at work is something we're constantly doing. These conversations are foundational to building trust, connecting with others, growing our capabilities, and ensuring shared meaning and direction. Understanding how to improve the conversations we have with others at work can significantly up-level our confidence, comfort, and the results we hope to achieve.

Example Content:

The example content includes several diagrams:

- Working with Others ...**: A table with four rows:

Build	Build trust
Connect	Connect with others' hearts and minds
Grow	Grow our organization by developing others
Create	Create shared direction
- Crucial Conversations Model**: A circular diagram with 'FOCUS OF SHARED MEANING' at the center, surrounded by 'SAFETY' and 'SPEECH'. It is divided into 'BEFORE', 'DURING', and 'AFTER' phases.
- Transformational Level**: A diagram of a human head profile with 'AMYGDALA' in the center, surrounded by various brain regions and a 'Smart Plan' at the bottom.



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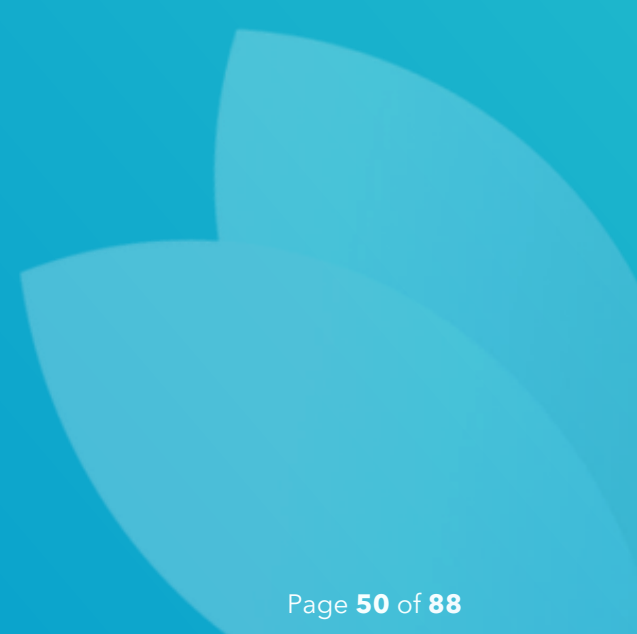
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Leading Others

Leading others requires its own skill set. Learn different ways, practices, and techniques to enhance your leadership capabilities, while increasing team member engagement, performance, productivity, and satisfaction.



Advanced Coaching

Overview

Learn advanced techniques and best practices for coaching employees and teams, including coaching capabilities and practices used by expert executive coaches.

Learn about:

- Learn the core competencies, skills, and techniques used by executive coaches
- Learn approaches to more effectively diagnose team and individual coaching needs
- Learn techniques to significantly advance your coaching capabilities

Key topics covered:

- Revisit the COACH Model
- Core Competencies for Coaches
- Diagnosing Coaching Needs
- Advanced Coaching Best Practices
- Advanced Coaching Techniques

Why this matters?

Coaching is consistently rated among the most important and most effective techniques of engaging employees and developing their capabilities and careers. Investing in advanced coaching skills will pay dividends in improved employee engagement and performance.

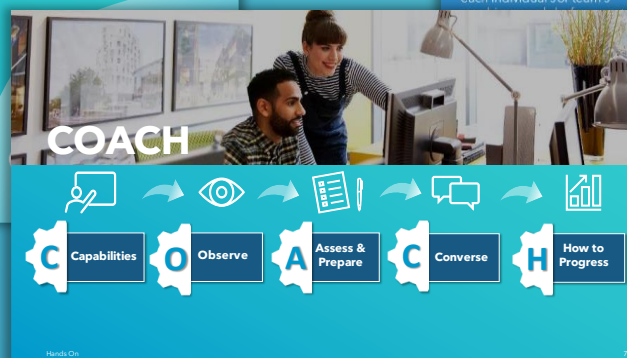
Example Content:

Core Competencies of Great Coaches

- 1 Foundation:**
 - Demonstrates ethical practice
 - Embodies a coaching mindset
- 2 Co-creating the relationship:**
 - Establishes and maintains agreements
 - Cultivates trust and safety
 - Maintains presence
- 3 Communicating effectively:**
 - Listens actively
 - Evokes awareness
- 4 Cultivating learning and growth:**
 - Facilitates growth

Hands On

COACH



C Capabilities **O** Observe **A** Assess & Prepare **C** Converse **H** How to Progress

Hands On

Diagnosing Different Coaching Needs

As Coaches, we should consider each individual's or team's

High	New to role or Low motivation	Top performer or Solid performer
Low	New to role or Low performer	New to role or Great attitude
	Low	High

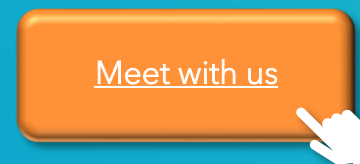
SKILL (Y-axis), WILL (X-axis)

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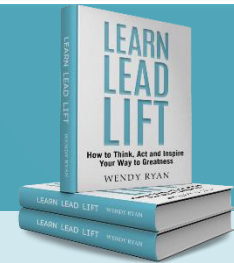




Advanced Leadership Skills

Leadership is a journey without a fixed endpoint. While everyone has the potential to lead, it takes ongoing and deliberate practice for us to become and continue being great leaders. The truth is, we don't ever reach a point in our careers where we can't benefit from additional learning and growth.

In this new interactive course, Wendy Ryan, best-selling author of [Learn Lead Lift: How to Think, Act, and Inspire Your Way to Greatness](#), will guide you in upleveling your leadership. Rise to meet the demands of tomorrow's workplace today through The Learn Lead Lift Framework®.



Module 1

Introduction to The Learn Lead Lift Framework® (pre-recorded)

Through the lens of putting people first, adapting to VUCA-style change, and anchoring to authenticity, you will:

- Be introduced to the mindsets, skillsets and behaviors that define great leadership.
- Identify the barriers or derailleurs that are holding you back from being a great leader and learn how to overcome them.
- Create an action plan to elevate your leadership and identify the resources you will need to execute it.

Module 2

Learn Lead Lift: Required Mindsets (Live via Zoom)

Mindsets are "how you think" as a leader. Because they are one of the most difficult elements to shift on your own, this module will help you harness the collective wisdom of the group to realize a step change in your current thinking.

Module 3

Learn Lead Lift: Developing Leadership Skill Sets (Live via Zoom)

Skill sets - what you know or know how to do - matter in leadership. Especially the types of skills that we often describe as "soft". Join us as we take a deep dive into a few of the more challenging skill sets in the Learn Lead Lift Framework.

Module 4

Learn Lead Lift: Fine-tuning FIDAH aka Leadership Behaviors (Live via Zoom)

We will wrap up our course with some challenging intra- and interpersonal work to transform your FIDAH Behaviors, or how you show up to others as a leader.



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Kadabra

www.wearekadabra.com

Being a Leader



Overview

Learn the fundamental practices and techniques of leadership, including ways to better engage, motivate, and retain diverse top talent.



Learn about:

- The importance of effective leadership
- The role and qualities of effective leaders
- Key steps you can take immediately to enhance your leadership effectiveness

Key topics covered:



- What it means to be a leader
- Qualities of effective leaders
- Role of effective leaders
- What's next in your leadership journey



Why this matters?

Great leaders are critical to the success of any team. Leadership is a journey, not a destination. The best leaders understand that they are constantly evolving their leadership skills and must model humility, vulnerability, continuous learning, and personal growth for their teams to follow.

Example Content:

The example content includes three slides:

- Key Actions You Can Take:** A flowchart with four main points: 1. Know the job well to be kind of a expert, 2. Know your team members: recognize, development, direct and feedback, 3. Set clear goals and direction, 4. Engage with team frequently and create high quality feedback and a trusted network.
- Steps Toward Building Trust:** A process flow starting with 'Trustworthy' (Transparency, Reinforce the positive, Use the input of others) leading to 'Have updates frequently', 'Make yourself available', 'Do what you say you will do', 'Establish clear goals and responsibilities', and 'Communicate often and honestly'.
- A Simple Model for Development and Delegation:** A circular diagram divided into three segments: Strengths, Development Areas, and Weaknesses. Each segment has associated text boxes describing actions like 'Create assignments to build on strengths', 'Create assignments to stretch your skills', 'Challenge', 'Set boundaries', 'Communicate often and honestly', and 'Develop and strengthen your own skills to be able to...'. A central box says 'Do what you say you will do'.



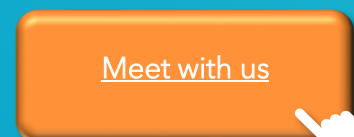
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Being an Inclusive Leader

Overview

Learn how create and sustain an inclusive work environment and how this benefits you, your team, and your overall organization.



Learn about:

- The many imperatives that call for a strong organizational, team and individual commitment to diversity, equity and inclusion
- How bias and discrimination have led to a broad system of inequality
- How vast and varied biases can be and how we must challenge our own thinking to effect change
- The role that you can play to create a more diverse, equitable and inclusive environment

Key topics covered:



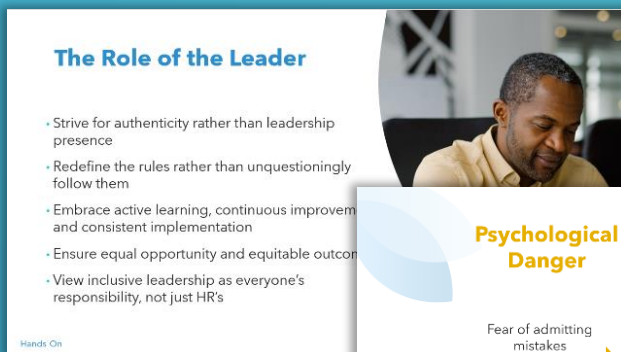
- The Imperative for Diversity, Equity and Inclusion
- Bias and Systemic Discrimination
- The Leader's Role
- Combatting Unconscious Bias
- Creating Psychological Safety for All



Why this matters?

Inclusion and belonging are key to creating a safe and engaging work environment and building and sustaining high-performing teams. Leaders play a pivotal role in creating and sustaining an inclusive work environment where diversity is embraced and leveraged, and all team members have a strong sense of belonging where they can bring their whole selves to work.

Example Content:



The Role of the Leader

- Strive for authenticity rather than leadership presence
- Redefine the rules rather than unquestioningly follow them
- Embrace active learning, continuous improvement and consistent implementation
- Ensure equal opportunity and equitable outcomes
- View inclusive leadership as everyone's responsibility, not just HR's

Hands On



Actions for Leaders

- Deepen your self-awareness
- Foster social connections
- Invest resources in inclusion
- Lead with courageous vulnerability
- Create connections
- Listen to understand



Psychological Danger

Fear of admitting mistakes

Common knowledge effect

Blaming others

Less likely to share

Psychological Safety

Comfort admitting mistakes

Better innovation and decision-making

Learning from failure

Everyone is open

Hands On



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Creating Culture as a Leader



Overview

Learn how to enhance the culture of your team, which in turn increases team member engagement, commitment, and satisfaction, while getting the whole team moving in a shared direction.



Learn about:

- The definition and principles of a healthy company culture
- The impact of company culture on business performance
- Your role as a leader in creating and sustaining a healthy company culture
- How to create change when needed

Key topics covered:



- What is company culture
- Culture as the organization's immune system
- Leadership and culture change
- Engaging your team



Why this matters?

Culture is often defined as "the way we do things around here," or "the glue that holds us together." Culture is often misunderstood and often assumed. Yet a strong and purposeful culture is one of the most important defining characteristics of successful organizations and teams.

Example Content:

What is company culture and why is it important?

91% of respondents to a recent Deloitte survey say companies with a strong sense of purpose and culture also have strong financial performance.

Hands On

Company culture and business performance

A CLEAR MISSION AND FOCUS		
Vision	Strategy	Goals and Objectives
AN ABILITY TO QUICKLY ADAPT		
Customer and Market Focus	Organizational Learning	Creating Change
A CONSISTENT APPROACH		
Core Values	Cross Functional Coordination + Integration	Agreement
EVERYONE IS INVOLVED		
Empowerment	Team Orientation	Focus on Capability Development

21

6 Signs of a Toxic Culture

<p>Bad or unclear communication Projects lack clarity and cohesion, so those involved end -up misguided. There's zero accountability within the team and the company over poor results.</p>	<p>High employee turnover Replacing lost talent costs a lot of money for the company; it also affects employee morale. High and rapid turnover means there's something wrong in the workplace.</p>
<p>Gossipy behavior Colleagues usually team -up and form cliquish groups. They gossip about those excluded from their circle, creating an atmosphere of passive -aggression or downright resentment.</p>	<p>Micromanagement Bosses breathing down employees' necks can cause stress instead of inspiring productivity.</p>
<p>Poor leadership and management Bad bosses are groomed by their bad superiors and, in turn, will groom equally incompetent managers. The cycle goes on unless thoroughly addressed.</p>	<p>Minimal trust Management leaves no room for uninterrupted work and closely monitors their employees. Employees, in return, neither trust their superiors nor their colleagues, and even HR.</p>

27



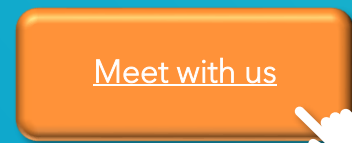
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Creating Strategic Vision & Aligning Your Team



Overview

This program is great for any leader who can benefit from learning how to develop a well-structured, elevating, and compelling vision, including learning how to communicate shared vision, meaning, and purpose to align your team and stakeholders.



Learn about:

- Understand why creating an elevating and inspirational strategy and aligning your team are critical to yours and your organization's success
- Learn how to create an elevating, inspirational, and actionable 'Why, What, How, and When' for your strategy
- Learn how to co-create strategy with others and align their commitment, passion, and enthusiasm

Key topics covered:



- Defining strategic vision and its key components
- Incorporating both leadership and management
- The importance and mechanisms of co-creation
- How to start with your 'Why'
- How to define and align your 'What, How, and When'
- Communicating your vision



Why this matters?

Key to effective and compelling leadership is the ability to communicate an elevating and inspiring vision: one where your team and others clearly understand their purpose, how the vision aligns with their values and interests, and the role they will play in this. Without this capability, leaders will struggle to align, motivate, and mobilize others to join them in realizing the vision.

Example Content:



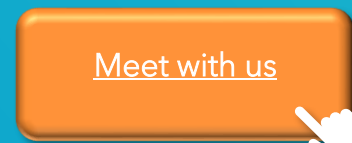
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Coaching



Overview

Whether you formally or informally lead others, coaching is a skill that you want to develop, practice, and use on a daily basis. Through effective coaching, your team members advance their capabilities, strengthen their engagement, motivation and satisfaction. Coaching continues to be rated among the most important people and team leadership skills.



Learn about:

- Why coaching is so important to your role as a leader
- Learn and apply a best-practice coaching model
- When to coach and for what purposes
- The required skills, behaviors, and beliefs to coach others effectively

Key topics covered:



- What is coaching and why it's important
- When to coach
- How to coach
- Practical and immediate ways to start coaching your team members



Why this matters?

Coaching team members is rated among the top leadership competencies that employees say they need but rarely get. Learning a simple methodology, while changing our own mindsets on the importance and high-value impact of effective coaching, is critical to your success in leading, developing, and motivating others.

Example Content:

Coaching for Different Things

- Aptitude:** Capabilities, Results, Career
- Attitude:** Engagement, Behavior, Relationships
- Outside Factors:** Organizational Change, Personal Change, Natural Disaster, Pandemic, Recession, etc.

Coaching Roles & Responsibilities

Coach Facilitator and Advisor	Coachee Learner
members learn and grow	
near cadence	
ational and	
stand	
lear	
stacles and led	
	<ul style="list-style-type: none"> • Commit and be open to learn and be coached • Ask for coaching when needed • Prepare for coaching conversations • Clearly define the situation and where help is needed • Clearly define desired outcome • Listen and clarify as needed • Co-create action plans with clear outcomes and timing • Ask for help when resources are needed or advice to overcome obstacles

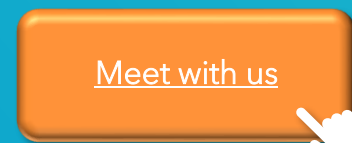
From GROW to COACH



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Delegation & Empowering Others



Overview

Whether you're a formal or informal people leader, such as leading project teams, learn foundational leadership skills to improve how you delegate, motivate, and empower others.



Learn about:

- The benefits of effective delegation
- Best practices to delegate effectively
- Opportunities to delegate for development
- How to build empowerment through delegation

Key topics covered:



- Importance of effective delegation
- Key steps, techniques, and practices of effective delegation
- Key steps, techniques, and practices of empowerment



Why this matters?

Whether we're formal or informal leaders, we're often delegating tasks. This is also true in peer-to-peer scenarios as well. For most of us, delegation is something that we're doing on a regular basis. It's imperative that we delegate effectively to ensure clarity of tasks, standards and timelines expected, while seeking to increase the other person's commitment to complete the task as needed.

Example Content:

The example content includes several slides:

- What stops us delegating?**: Lists common reasons why people don't delegate, such as "It takes too long to explain the task" and "I don't know how to do it".
- Things that might go wrong with delegation and how to fix them**: A table with 'Problem' and 'Solution' columns. Problems include "People aren't clear what you expect" and "I have more to do than I can handle". Solutions include "Clearly explain the required results and what you expect" and "Prioritize tasks to focus on and delegate the rest".
- The different levels of Delegation**: A diagram showing six levels of delegation based on 'Trust & Confidence'.
 - Level 1**: You bring the task to bear and bring on the facts and let them decide what to do.
 - Level 2**: Let me know the pros and cons so we can discuss together, and I will decide.
 - Level 3**: Make a recommendation and we can discuss it and decide together.
 - Level 4**: Explore the issue, make recommendations and we can discuss, but ultimately you will decide.
 - Level 5**: You consider and let me learn what has gone wrong. Call me if you need support.
 - Level 6**: You consider, decide, and complete the task and let me learn what it is done.



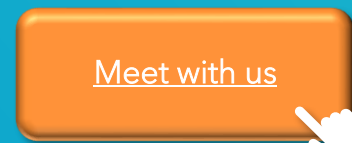
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EXPLICIT EXPECTATIONS: THE DEFINITIVE COURSE ON MANAGEMENT FUNDAMENTALS



"I've been promoted to a people management position and don't know what to do first or next!"

"You expect me to do WHAT?"

"What are the secrets to successfully managing and motivating my team?"

"What am I responsible for now?"



Program Overview:

Organizations place a significant amount of trust in the people they select to manage their most valuable resources – their people. And managers are primarily responsible for the success, motivation, and retention of their people; 70% of the variability of whether an employee is engaged and will remain with an organization is dependent on their managers. And with 70% of employees reporting that they are disengaged – some even actively disengaged – from their work, and their likelihood to quit a job because of their manager, and not necessarily the organization, managers' roles are even more important and impactful.

This comprehensive training program is designed to equip new and experienced leaders with the essential knowledge, skills, tips, best practices, tools, insights, and models to effectively manage and lead teams. It makes the, oftentimes, implicit expectations of organizations, explicit. Drawing on the insights from R. Karl Hebenstreit's *Explicit Expectations: The Essential Guide & Toolkit of Management Fundamentals*, this program will cover key leadership concepts and best practices.



Format

3 Hours

Engaging and Dynamic

Online via Zoom

Format: The training will be delivered virtually via Zoom, allowing for flexibility and accessibility. Each of the four modules is three hours long, providing a focused and engaging learning experience.

Modules

LEVEL 1: General Foundations For Successful Management - Meeting the Organization's Needs

Module 1: Adopting a Leadership Mindset of Growth & Inclusivity

- Unlearning unhelpful and unhealthy perspectives and replacing them with a growth mindset
- The 7 Cs of Explicit Expectations and the 5 Practices that ensure effective leadership
- Strategic Planning and Organizational Design
- Justice, Equity, Diversity, and Inclusion, Creating a Psychologically Safe Environment, Identifying and Challenging our Implicit Biases, and Overcoming Stumbles
- Values-Based Interviewing, Recruiting, and Hiring

Module 2: Setting up your Team for Success with Clarity & Communication

- Creating and Supporting Effective On-Boarding Plans, including Clear Accountabilities
- Goal-Setting
- Check-Ins and One-on-Ones
- Prioritization, Delegation, and Empowerment

EXPLICIT EXPECTATIONS: THE DEFINITIVE COURSE ON MANAGEMENT FUNDAMENTALS

LEVEL 2: Adapting & personalizing your leadership to meet your team's needs

Module 3: Supporting & Managing Your Team for Present & Future Success with All 7 Cs

- Coaching and Other Leadership Styles
- Feedback and Critical Conversations
- Performance Management
- Engaging and Motivating Your Team
- Employee and Career Development

Module 4: Final Fundamental & Foundational Factors

- Conducting Effective Team Meetings
- Change Management
- Terminations
- Managing Up
- Bringing it all Together with The Explicit Expectations Engagement & Alignment Guide

Learning Objectives:

By the end of this program, participants will be able to:

- Adopt a new mindset of growth and inclusivity
- Create a psychologically-safe environment for their teams to flourish and innovate
- Set clear and explicit expectations for their team members, as well as determine others' explicit expectations of them
- Build strong relationships and trust within their teams
- Empower and delegate effectively to maximize productivity
- Lead and manage change successfully
- Foster a positive and innovative work environment
- Implement proven best practices in each of the areas in which they are expected to excel

Target Audience:

This program is suitable for individuals in leadership roles, including:

- New managers
- Experienced leaders seeking to enhance their skills
- Team leads
- Supervisors

Benefits:

- Improved leadership effectiveness
- Enhanced team performance
- Increased employee engagement and satisfaction
- Stronger organizational culture
- Better decision-making and problem-solving
- Optimized innovation through inclusive and psychologically safe work environments



Karl is a certified Executive Coach, Leadership/Team/Organization Development Consultant, and international speaker who has over 25 years of experience coaching leaders and their teams (from Individual Contributors to CEOs in myriad industries and sectors) to work better together and consistently exceed their organizations' goals. He holds a PhD in Organizational Psychology (where this thesis was on "Using the Enneagram to Help Organizations Attract, Retain, and Motivate their Employees") and has authored three books: *The How & Why: Taking Care of Business with the Enneagram* (now in its 3rd Edition), *Nina and the Really, Really Tough Decision* (now available in English, Spanish, French, and Greek), and the newly-released *Explicit Expectations: The Essential Guide & Toolkit of Management Fundamentals*.

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Leading Hybrid Teams



Overview

Hybrid teams are becoming more of the norm in this post-COVID and ever-increasing digital world. Despite the proliferation of hybrid teams many teams are still finding the transition from in-person, or fully remote, to come with certain challenges. These challenges trigger the need to re-think and potentially re-design how our teams work together and how we best support our teams as their leader.



Learn about:

- The nature and needs of hybrid teams
- How to best engage, communicate, and meet with others in a hybrid team environment
- How to give direction to and develop your team members



Key topics covered:

- Key differences in a hybrid team environment
- Engaging with others
- Setting goals and work plans
- Team communications and meetings
- Developing your team



Why this matters?

Hybrid team leaders must master many areas including team moral, communication, engagement, goal setting, coaching, and scheduling to blur the distinction between in-person and remote team members. Establishing co-created team norms will build a positive culture of productivity, efficiency, and belonging.

Example Content:

Team Meetings

First, consider if <50% of your team are in the office, just have a virtual team meeting so that everyone feels on the same footing

Structure

Open

- Check-in with people
- Share something that is happening for you right now outside of work
- Agree the agenda together

Body

- Follow the agenda
- Give everyone an opportunity to ask questions, give feedback
- Check-in with those who don't speak-up

Close

- Celebrate successes and progress
- Agree next steps
- Check-in for anything else

Hands On

Different Types of Teams

Co-located Teams

Virtual Teams

Virtual Teams are close to, if not up of remote team. This means that routinely connect through virtual like video ng messaging like Slack and virtual ve workspaces like

Hybrid Teams

Hybrid Teams have a mix of co-located and remote team members.

There are also hybrid people who work partially onsite and partially offsite.

Hands On

User Stories & Team Backlog

User Need

Get up → Get Ready → Get To Work

User Steps

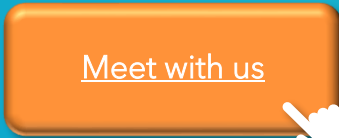
Turn off alarm	Collect clothes	Do morning hygiene	Make breakfast	Choose vehicle	Park vehicle
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User Sub-Steps

Turn off immediately	Get dressed immediately	Take a shower	Make coffee	Drive car	Park in garage
10 minutes 'snooze'	Take clothes to bathroom	Brush teeth	Eat cereal	Ride bike	Park in blue rack

User Stories

Hands On



Managing Others



Overview

If you're new to managing other people, this is a great foundational leadership program where you'll learn a number of practices for effective management of other colleagues. This program is also great for experienced people managers who were never trained in foundational leadership practices or would simply like a refresh on these practices.



Learn about:

- Key people processes and your role as leader
- Your role and expectations as a people leader and manager
- How to identify your team members' strengths, developmental areas and interests
- How to cascade and set SMART goals
- How to better prioritize and delegate work to your team
- How to better manage team member performance and development

Key topics covered:



- Leading vs. managing
- Leadership expectations
- People processes and your role
- Setting goals
- Skill vs. Will to delegate work and develop your team



Why this matters?

Effective leadership of teams is not something organizations want to leave to chance. Setting clear expectations, communicating, and training people leaders on best practices and techniques for setting team direction, motivating, and developing their team members leads to team and organizational success.

Example Content:

The example content includes three main visual elements:

- Observing and Understanding Team Members:** A slide with bullet points such as "Define good vs. great performance in each of your team roles (think praise for talented people)", "Perfect on good performance + top feedback", "Spend time observing others at work", "Ask for feedback - team partners and direct reports", "Avoid making assumptions of their effort", "Be silent about what you're seeing vs. what you want to see", "Be fair about what you're seeing", "Consider each individual's strengths and developmental areas to what your role", "Consider the individual's career interests", and "Align the organization's existing and developmental goals with the individual's strengths, developmental areas and interests".
- Leadership Expectations:** A slide with a grid of icons representing various leadership concepts like "Communicate and provide clear expectations", "Set clear goals and objectives", "Establish a clear vision and strategy", "Empower others to do their jobs", "Be fair and consistent", "Lead by example", "Communicate effectively and listen", and "Provide ongoing support and feedback".
- Leader's Role in Employee Lifecycle:** A circular diagram with "Leader's Role in Employee Lifecycle" at the center, surrounded by icons for "Recruit & Hire", "Onboard", "Develop", "Manage Performance", and "Retire & Exit".



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Servant Leadership



Overview

Learn a different, albeit tried and true, way of approaching leadership from the vantage point of others-being in servitude. Learn this shift in mindset and approach from traditional, hierarchical type orientation to an approach that is more humble, caring, and proven to be more successful.



Learn about:

- What is Servant Leadership and why it matters
- How servant leaders approach their leadership responsibilities
- The competencies that servant leaders focus on and continuously develop
- How you can apply Servant Leadership in leading your team and others

Key topics covered:



- Overview of Servant Leadership
- Key Principles and Practices of Servant Leaders
- Key Competencies to Develop
- Applying Servant Leadership at Work

Why this matters?

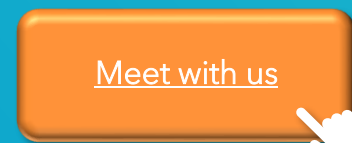
Effective leadership is critical to any organization, both in setting the right direction as well as engaging employees and teams. It is now well-known that command-and-control type leadership is highly ineffective, and often very demotivating to employees and teams. Being in servitude to your organization and your people has been shown time and again to be a highly effective approach to leading others and the organization. Some of the best brands are consistent adopters of Servant Leadership.

Example Content:

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Team Optimization



Overview

Whether you lead or work in teams, learn the traits and practices of high-performing teams, and what role you can play to optimize your team’s effectiveness. (You do not need to be a team or people leader to attend this program, since we can all benefit from learning ways to optimize our team’s performance.)



Learn about:

- What makes a high-performing team
- How you can set-up your team for success
- How to enhance team engagement, performance and satisfaction through coaching and creating a safe environment to innovate

Key topics covered:



- Characteristics of high-performing teams
- Different team types
- Diagnosing team health
- Setting teams up for success
- Coaching teams
- Creating psychological safety



Why this matters?

So much of our work is accomplished through teams. Taking the time and effort to learn ways to optimize team structure, set-up, communications, meetings, work assignments, collaboration, and more will pay dividends in the up-leveling of team alignment, engagement, satisfaction, and results.

Example Content:

What's the Impact?

Cost of Poor Teamwork:

- Lost revenue and higher overhead
- Increased time-to-market
- Increased costs of products or services
- Decreased quality of products or services
- Decreased innovation
- Increased employee turnover
- Decreased employee engagement

Measuring Psychological

- Decrease in the team's confidence, what's expected of them?
- Poorer outcomes from their efforts to create and execute work for their team?
- Increase in the team's ability to make it in a more fast-paced team?
- Poor meeting performance, no work, no time to find the team?
- All members of the team feel able to raise problems and seek help?
- Members of the team never talk about failures or setbacks or what is left out?
- It is easy for all team members to take time?
- It is easy for us to ask each other for help?
- Members of the team would like to be in a more fast-paced team?
- Everyone's input, ideas and skills are effectively used in the team?

The 'Trust Equation' – 4 Key Elements

Trustworthiness = $\frac{\text{Credibility} + \text{Reliability} + \text{Integrity}}{\text{Self Orientation}}$

- **Credibility** – Can I trust the technical expertise of this person? Experience, confidence, know-how, can they do the work, is my interest possible?
- **Reliability** – Can I trust this person to deliver what they committed to on time? Revealed by keeping our promises and consistency.
- **Integrity** – Is this person open, and I trust there to be consistent? Related to academic, psychological safety, ethical transparency.
- **Self Orientation** – Does this person always operate in their own best interest, not with a sense of reciprocity? Sense of self-interest, full disclosure, noncollaborative, etc.



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The Neuroscience of Leadership

Overview

Learn the latest research in neuroscience and its link to effective leadership. Learn practical things you can do to significantly increase your leadership effectiveness.



Learn about:

- What is neuroscience
- How neuroscience can be leveraged to increase your leadership effectiveness
- Key steps you can take now to increase your leadership effectiveness
- How to continue to learn, evolve, and build your leadership agility

Key topics covered:



- Neuroscience overview
- Neuroscience and the brain - a deeper look
- Linking leadership and neuroscience
- Increasing leadership effectiveness
- Increasing leadership agility



Why this matters?

The quality and effectiveness of leadership drives everything that's done in an organization - from strategy, to team alignment and mobilization, to execution. Increasing leadership effectiveness should be a primary goal of any organization.

Example Content:


Trust as the Starting Point

Although humans are capable of transmitting ideas and adopting innovations faster than any other species, the human brain is still shaped by evolutionary development that adapts structures rather than destroying them to build new ones.

Tomorrow looks uncertain and risky and hence brain reacts as if the future is a physical threat.


The ambiguity inherent in decisions about the future can lead to "safe" decisions, or more worryingly delay them.

Creativity is constrained by fear of uncertainty.



Theory of Mind - TOM

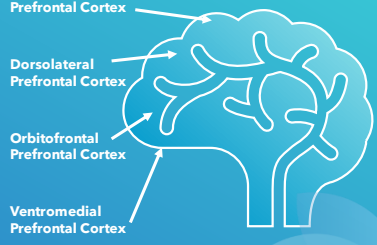
Having a Theory of Mind (TOM)



Leadership Can Be Learned

The prefrontal cortex can be developed, and its capacities enhanced through focused attention and practice.

Developing an increased ability for self-management and consistently practicing the self-discipline required to interject the "free won't" between impulse and action, or instinctive thought and spoken word, depends on tremendous motivation and will, and years of practice, reflection and feedback.



- Prefrontal Cortex
- Dorsolateral Prefrontal Cortex
- Orbitofrontal Prefrontal Cortex
- Ventromedial Prefrontal Cortex



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Transitioning into Management



Overview

Learn what's required in the shift from individual contributor to leading others, including best practices, dos, and don'ts, and more. Set yourself and your new team up for success by investing the time to learn new tools and approaches to optimize your team leadership.

Learn about:

- What's different [in the shift from IC to manager]
- Core expectations of people managers
- Foundational / employee lifecycle activities
- How to develop your leadership skills

Key topics covered:

- Shifting from IC to Manager
- Expectations & Role of People Managers
- Foundational People Management
- Employment Law
- Hiring
- On-boarding
- Setting Development Goals & Plans
- Managing Performance

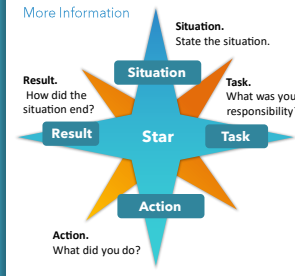
Why this matters?

Shifting from individual contributor and peer to team leader is a significant transition and one where most new managers struggle without the full set of skills and foundational knowledge to be successful. When team leaders are not successful, their teams are likely to be unsuccessful as well. Preparing new leaders for their roles is an investment well worth making.

Example Content:

STAR Technique

Use STAR to Garner More Information



Situation. State the situation.

Task. What was your responsibility?

Result. How did the situation end?

Action. What did you do?

Hands On

STAR

Use STAR to discover talent, potential and determine whether the candidate will thrive here

How have you done in the past?

- ✓ Situation
- ✓ Task
- ✓ Action
- ✓ Result

What's different - shifting from IC to Manager

- You can no longer be "friends" with your direct reports
- Your team will look to you to model behavior and accountability
- Your team will expect you to do the "work" at a superior level
- Your team will expect you to routinely praise or correct their work
- Your team will expect you to set their direction and support their development
- Your team will expect you to develop their capabilities
- You are now accountable for setting the right direction, holding your team accountable, consistently complying with all laws and company policies

Hands On



1. Remain open to learning
2. Connect with your team
3. Meet with other managers
4. Listen to your team's feedback
5. Enhance your leadership skills
6. Be visible

Clear goals
Evaluate your department's operations
Give employees in changes
Schedule team-building
Establish communication best practices
Acknowledge your mistakes
Understand the difference between an email and a meeting
Engage your team

4

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Personal & Professional Development

Putting focus on your own personal and professional development can significantly enhance your professional capabilities, resilience, and overall fulfillment and satisfaction at work and beyond.

Career Development

Overview

Learn tips and techniques to identify your career interests, strengths, and developmental areas, while creating more robust career and development plans for your career advancement.



Learn about:

- Identify your strengths, developmental areas, and career interests
- Find development and career opportunities that best fit you and your needs
- Obtain and align the resources you need
- Create plans to work toward your goals

Key topics covered:



- Understanding and defining career interests
- Personal SWOT analysis
- Finding and aligning support
- Creating robust development and career plans

Why this matters?

We each own our careers and career growth. Others can help us on this journey, but no one other than you can own your development and career growth. Understanding your career interests, your strengths, and developmental areas is a critical starting point. From there, building an actionable and achievable plan, with support from others, is what enables you to work toward your career goals and aspirations. Without a plan, it's unlikely that you'll reach your goals.

Example Content:

Career Development Principles

- Development is a learning curve you climb.
- No one needs an MBA when you're working at an MNC.
- Use manager feedback and support. Ask you are recommended.
- You go only as far as your support.
- Career paths are not necessarily linear. Bend or fly by the seat of your pants.
- This career path is an overlap of what you love, what you are good at and what the market needs (see 70/30/60).
- Those who know what they want, and stick to it in the end, are more successful.

Develop Your Plan

- Get it right from the start.
- Start with your Career Development Plan.
- Use your Career Development Plan to guide your actions.

Being Opportunity-Minded

Opportunities:

- New
- Existing

 Challenges:

- Lack of resources
- Lack of support
- Lack of information

 Skills & Abilities:

- Technical Skills
- Soft Skills
- Leadership
- Communication

 Values:

- Integrity
- Honesty
- Accountability
- Customer Service
- Teamwork

 Attitudes:

- Growth Mindset
- Resilience
- Adaptability
- Curiosity
- Openness

 Career Development:

- Learning
- Networking

 Career Goals:

- Short-term
- Long-term

 Career Interests:

- Passion
- Interest

 Career Strengths:

- Skills
- Abilities
- Talents

 Career Weaknesses:

- Lack of resources
- Lack of support
- Lack of information


 Career Development Plan:

- Career Goals
- Career Interests
- Career Strengths
- Career Weaknesses
- Career Opportunities
- Career Challenges
- Career Skills & Abilities
- Career Values
- Career Attitudes
- Career Career Development
- Career Career Goals
- Career Career Interests
- Career Career Strengths
- Career Career Weaknesses
- Career Career Opportunities
- Career Career Challenges
- Career Career Skills & Abilities
- Career Career Values
- Career Career Attitudes
- Career Career Career Development
- Career Career Career Goals
- Career Career Career Interests
- Career Career Career Strengths
- Career Career Career Weaknesses
- Career Career Career Opportunities
- Career Career Career Challenges
- Career Career Career Skills & Abilities
- Career Career Career Values
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- Career Career Career Career Weaknesses
- Career Career Career Career Opportunities
- Career Career Career Career Challenges
- Career Career Career Career Skills & Abilities
- Career Career Career Career Values
- Career Career Career Career Attitudes

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Growth Mindset

Overview

Growth Mindset is a way of thinking and being in the world. It's a way that we approach both opportunities and challenges and how we continuously grow our capabilities and network and seize the opportunities that present themselves to us. Learn how to "re-frame" how you approach issues, challenges, setbacks, failures, and stress.



Learn about:

- What is a Growth vs. Fixed mindset
- How to combat your Fixed Mindset
- How to build your Growth Mindset
- How you can help others build their Growth Mindset

Key topics covered:



- What is Growth Mindset
- Why a Growth Mindset Matters
- Combating Fixed Mindset
- Building Your Growth Mindset

Why this matters?

People with a Growth Mindset view their failures and setbacks as an opportunity to grow and as a sign that they should continue to develop their skills. By changing the way you think, you can change the way you learn. Knowing that your capabilities can always be developed allows you to explore, experience, and achieve more in life.

Example Content:

Growth vs. Fixed Mindset

GROWTH MINDSET
 "Failure is an opportunity to grow"
 "I can learn to do anything I want."
 "Challenges help me to grow."
 "My effort and attitude determine my abilities."
 "Feedback is constructive."
 "I am open to the success of others."
 "I like to try new things."

FIXED MINDSET
 "Failure is the limit of my abilities."
 "I'm either good or I'm not."
 "I don't like to be challenged."
 "My potential is pre-determined."
 "When I'm frustrated, I give up."
 "I stay away from people who are better than I am."

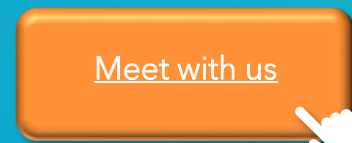
Things You Can Do

Recognize that a growth mindset is not just good, but is also supported by science. In other words, you need to be committed to developing a growth mindset.

You can learn and teach others about how to develop and improve their abilities through adopting a growth mindset. This will help you to take control of your life, which is hugely empowering. Research shows that people who feel in control tend to perform better.

Listen out for your fixed mindset voice. When you hear that little critical voice in your head telling you that you can't do something, reply with a growth mindset approach and tell it that you can learn.

Instead of ...	Try thinking ...
I've just got it this time.	What am I missing?
I've got this one down.	Can we try it a different way?
I can't do this.	It's not about the challenge, it's about learning.
This is too hard.	This may take some time and effort.
I can't remember this any longer.	Even though it's important, we'll keep trying.
I just can't do it.	I'm going to learn my lesson in it.
I need a rest day.	Maybe that's not the best solution.
This is so hard, I'll never be that good!	Can you be like the others and learn from the others, or can you do it with your own effort?
It's good enough.	Is it really not that good?
Man it didn't work.	Good thing the algorithm has 20 more letters.



Increasing Resiliency



Overview

Resiliency continues to be rated among the most important skills we can have in both professional and personal realms. Learn how to strengthen your resiliency and enjoy the benefits of increased resiliency in both work and beyond. As science has shown, resiliency is not something we're born with; it is a learnable and incredibly valuable skill.



Learn about:

- Why strengthening resiliency is important
- How to strengthen your resiliency
- The role a positive mindset plays
- How we can help others strengthen their resiliency

Key topics covered:



- Importance of resiliency
- How to increase your resiliency
- How to bolster your resiliency through mindset
- The benefits and ways to build resiliency in others



Why this matters?

Resiliency better equips us to respond to the pressure and demands of daily life. Strengthening resiliency helps develop grit, mental toughness, flexibility, develop high quality connections, manage stress effectively, and avoid burnout. Increased resilience leads to more successful business and personal outcomes.

Example Content:

The example content includes three main slides:

- Why Resiliency Matters:** A slide with a list of 7 points: 1. Develop high-quality connections, 2. Manage stress effectively and avoid burnout, 3. Act authentically and in accordance with their strengths and values, 4. Develop grit (the passion and perseverance to pursue long-term goals), 5. Stay hopeful and find meaning, 6. Stay flexible and remain healthy, 7. Actively manage change and setbacks.
- Increasing Resiliency at Work:** A slide with a title and several bullet points, partially obscured by other content.
- Understanding the Neurology of Resiliency:** A diagram showing brain regions and their functions:
 - Composure:** Emotion regulation, patience, calm and in control. Hypothalamic-Pituitary-Adrenal axis.
 - Health:** Exercise frequency, sleep hygiene, healthy nutrition. Neurogenesis through BDNF from Hippocampus.
 - Reasoning:** Problem-solving, resourcefulness, anticipate and plan. LAM Frontal cortex, Anterior cingulate cortex.
 - Tenacity:** Persistence, optimism through adversity. Prefrontal cortex, Regulate HPA activation.
 - Collaboration:** Support networks, working in teams, managing perceptions. Right Prefrontal cortex, Fusiform gyrus.
 - Vision:** Purpose, meaning, goal-orientation, self-worth, personal values. Hippocampus, Prefrontal cortex, Ventral striatum.



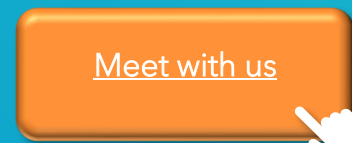
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Managing Stress and Burnout & Using Learned Optimism



Overview

Stress is something we all encounter and have to pay attention to. This program discusses ways to catch stressors before they become too great and ways to better cope with and manage stress productively.



Learn about:

- Why proactive and purposeful management of stress is important
- The difference between stress and burnout
- Signs and symptoms of stress and burnout
- Better ways to cope with stress



Key topics covered:

- Understanding stress and burnout
- How stress affects our brains
- Obvious and unobvious signs of stress and burnout
- Using learned optimism
- 3Rs for better stress management

Why this matters?

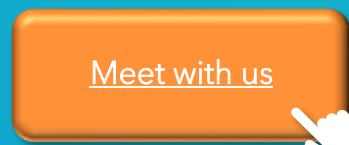
Certain levels of stress are to be expected in our lives both inside and outside of work. Keeping an eye on our stress levels and managing these in healthy and productive ways increases our resiliency, performance, and satisfaction. Understanding how to stop stress from becoming a state of burnout is equally critical. Learning how to adopt learned optimism as a mindset is highly beneficial.

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Personal Branding



Overview

This program will help you understand how to build and strengthen your professional brand - how you want others to regard you. Personal branding, when done well, is key to influencing others and strengthening your career opportunities.



Learn about:

- How to define your personal brand
- How to create a marketing plan for the brand of you
- How to refine your brand over time

Key topics covered:



- Defining personal branding
- Creating your personal brand
- Developing and refining your brand



Why this matters?

Your brand is what you want people to remember about you and how they think about you for opportunities at work. Cultivating your brand is an investment you're making in your future career opportunities and personal leadership.

Example Content:

What Is a Personal Brand and Why It's Important

Your personal brand is a clear and succinct way of communicating who you are, and what you're all about. It is being transparent about what value you have to offer. A personal brand isn't that much different from a business brand, but you are starting with you.

It is about knowing who you are, what you offer, what value you can add in an authentic way.

Branding and reputation go hand in hand.



Hands On

Bringing Your Brand to Life

Think whether all the different channels are aligned. Do they complement each other? Are they consistent?

Are there any channels that you are not using, or not using as fully as you could?

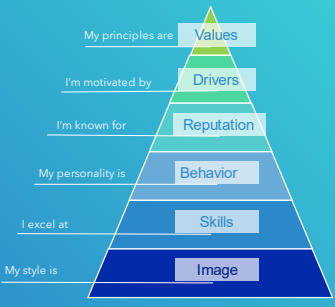
Find someone you think uses that channel well and get some advice.



Hands On

Personal Brand Pyramid

There are many ways to start building your brand from your initial



My principles are Values

I'm motivated by Drivers

I'm known for Reputation

My personality is Behavior

I excel at Skills

My style is Image

14



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Technical Skills

If you are working in Life Sciences, there are many technical areas of the business where you can develop your awareness, knowledge, and capabilities. Developing technical skills can significantly enhance your contributions, performance, and overall satisfaction.

Clinical Operations



Overview

Learn the fundamentals of Clinical Operations and their role and responsibilities in managing clinical trials and clinical studies. This is useful if you are in Clinical Operations and want more guidance on the full cycle of this group and its work. This is also useful if you work with Clinical Operations and/or just want to learn more about this group's role in steering clinical trials and clinical studies to successful conclusion.



Learn about:

- The purpose and responsibility of Clinical Operations
- Clinical trial phases and Clinical Operations responsibilities during trials
- Essential tools used
- Common problems Clinical Operations experiences



Key topics covered:

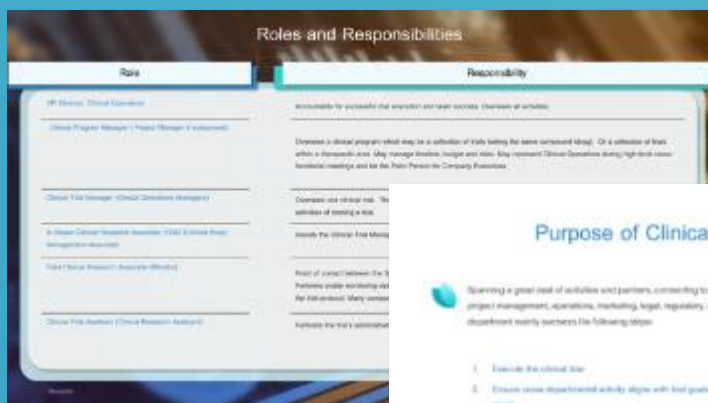
- Overview of clinical trials and operations
- Clinical Operations roles and responsibilities
- Clinical Operations trial phases
- Clinical Operations tools



Why this matters?

Clinical Operations plays a pivotal role in a Life Sciences organization's ability to move its product pipeline from early development to late development and ultimately to commercialization. It is, therefore, great context for other functions to understand how Clinical Operations works and its key tools and processes.

Example Content:



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Drug Discovery & Development 101



Overview

This program will help you understand the broader context of Life Sciences drug discovery and development, which is important context for all colleagues who work in Life Sciences, as it will help you understand some of the primary functions of your business.



Learn about:

- The overall drug discovery and development process and key milestones
- Key steps to reach the end goal: commercialization
- R&D team roles and responsibilities
- What being a patient-centric organization requires
- Current trends and evolutions in the industry

Key topics covered:



- Target Goal: Label
- R&D phases and regulatory milestones
- R&D team roles, responsibilities, and optimization
- Patient centricity
- Drug development trends and evolutions



Why this matters?

Life Sciences is a highly technical business. It's not always easy for colleagues outside of R&D to understand what we do, why we do it, how it matters, and how all the different roles fit together. And yet, colleagues outside of R&D play a key role in your overall success. In addition, R&D colleagues may not understand the full breadth of what's involved.

Example Content:



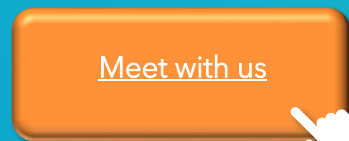
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Drug Discovery & Development 201



Overview

Learn advanced concepts and principles in drug discovery and development, including key stakeholders across the biopharma ecosystem, latest trends, and evolutions in biopharma, and more.



Learn about:

- The different players and stakeholders in life sciences
- The different activities per phase in R&D
- The different internal team roles and responsibilities
- The latest trends in the biopharma industry

Key topics covered:



- Life Sciences industry overview
- Activities per phase
- Team roles and responsibilities
- Latest trends in biopharma



Why this matters?

Advancing knowledge of the biopharma industry is critical to advancing the capabilities of internal teams involved in both R&D and other functions, whether the organization is commercial or yet to have a marketed product. Understanding the full range of activities and different players at different stages will accelerate and improve your team's results.

Example Content:



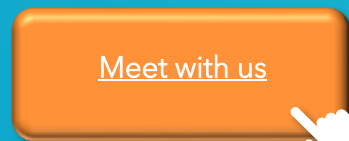
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Drug Safety



Overview

Everyone plays a role in drug safety from Phase I clinical trials onwards. Learn how Drug Safety works and more about Pharmacovigilance.



Learn about:

- The different roles and responsibilities ~ who's involved and why
- Positioning and use of pharmacovigilance
- Managing benefit-risk
- Population type impact on drug safety
- How drug safety is monitored and reported
- How adverse events are monitored and reported

Key topics covered:



- Key and supportive roles
- Drug safety vs. pharmacovigilance
- Benefit-risk management
- Population considerations
- Drug safety reporting
- Managing Adverse Events
- Other key reporting



Why this matters?

Regulatory agencies consider drug safety the responsibility of every employee and contractor involved in the work of a Life Sciences organization. Understanding how drug safety and pharmacovigilance are monitored, managed, and reported is a critical capability for any team member.

Example Content:



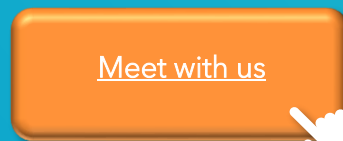
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GxP



Overview

The Life Sciences and adjacent industries are governed by good, consistent practices. Learn what these are – the full range, organizational requirements, and some of the key regulatory reporting requirements.



Learn about:

- What is GxP and its various sublines
- Why GxP matters and how organizations use these practices for better quality and compliance
- Different GxP requirements, including reporting
- GxP best practices and how these can benefit your organization

Key topics covered:



- Defining GxP
- Defining sublines of GxP
- Different GxP requirements
- GxP best practices



Why this matters?

Good Practices (GxP) govern a wide range of activities performed in Life Sciences and adjacent industries. The range of governance is very broad and involves many different functions and team members. Understanding the range of requirements across functions will help to ensure each function takes accountability for their part.

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Healthcare Compliance

Overview

Learn the fundamentals of healthcare compliance pertinent to the biopharma industry and what organizations must do to remain compliant.



Learn about:

- The importance of healthcare compliance
- Major governing bodies and their role in healthcare compliance regulations
- Major laws governing the pharmaceutical / biotech industry
- Healthcare compliance approaches, roles, and responsibilities within organizations

Key topics covered:



- Defining healthcare compliance
- Roles and oversight
- Key regulations that govern healthcare compliance
- Organizational considerations and designs for healthcare compliance
- Achieving healthcare compliance



Why this matters?

All employees and contractors play a role in helping to ensure an organization's compliance with healthcare and related regulations. Most programs on this topic are geared toward healthcare compliance experts, leaving a large gap for non-specialist team members. This program addresses that need for your organization.

Example Content:

The example content includes several slides:

- Organizational Approaches to Compliance:** A slide with a dark background and white text, discussing organizational approaches to compliance.
- Purpose of Healthcare Compliance:** A central white slide with a blue header. It lists two main purposes:
 - Patients:**
 - Protect patients and patient rights.
 - It may involve the difference between life and death situations.
 - Institutions and organizations:**
 - Direct process and procedures for adherence and support the dynamic and complicated regulations through communication and training.
- US Roles and Oversight:** A slide with a blue header and a table. The table has two columns: 'Agency' and 'Responsibility'.

Agency	Responsibility
Food and Drug Administration (FDA)	Regulates the safety and effectiveness of drugs, biologics, medical devices, food, and cosmetics.
Centers for Medicare and Medicaid Services (CMS)	Administers Medicare and Medicaid, and oversees accreditation of healthcare providers.
Department of Justice (DOJ)	Enforces federal criminal laws, including those related to healthcare fraud.
Department of Health and Human Services (HHS)	Oversees the overall health and human services of the United States.



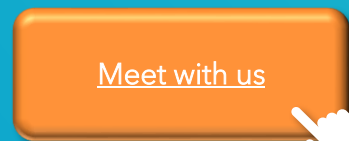
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Healthcare Economics



Overview

Learn the fundamentals of health economics and the role this field / function play in the biopharma industry.



Learn about:

- Key terms and concepts used in healthcare economics
- The role healthcare economics plays in society and our organizations
- Considerations needed to manage the disease burden and patient outcomes
- Influencers on healthcare economics



Key topics covered:

- Foundations of healthcare economics
- Components of healthcare economics
- Pharmaceutical considerations and influence on healthcare economics
- Launch products as considerations for healthcare economics



Why this matters?

Understanding how the organization generates revenue and profit is helpful for all team members, as this gives greater context to the nature of the business. It also helps all team members understand how pricing works in Life Sciences and the requirements of the organization to demonstrate value of its products.

Example Content:



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Market Access

Overview

This program will help you understand the critical role that market access plays in the biopharma industry and how efforts to build market access typically start years before commercialization. This program will significantly advance your knowledge of the business of biopharma.



Learn about:

- The purpose and mission of market access
- Organizational roles and responsibilities for market access
- Payer needs and segmentation
- The design and importance of values-based healthcare
- The purpose and importance of integrated evidence plans

Key topics covered:



- Evolution and fundamentals of market access
- Patient considerations
- Organizational considerations
- Other ecosystem players and their considerations
- Digital considerations
- Integrated Evidence Plans (IEPs)

Why this matters?

Beyond meeting patient needs, the goal of any biopharma organization is ultimately to bring their product to market. Bringing a product to market and sustaining it requires a strategic approach to market access that begins years before commercialization. Understanding how to build toward this approach early on is often the deciding factor between successful product launch and sustained product lifecycle management.

Example Content:

The Evolution of Market Access

2000

- Begin to address payer needs requirements
- Look for new mechanisms and pricing that may provide a bridge in other lower price or markets
- Myriad models designed to target payers, populations and/or address of medication choice

2015

- Payers for large molecule included drug-specific and disease-specific, new therapy areas
- Pharma structures to focus on more the top and
- Co-therapy innovations begin
- Goal: address, assess patient populations
- Tailored: High prices for therapy

2019

- Research and Development contract

2027 and Beyond

Payers (Government & Insurance)

- Goal: Cost savings and health system value
- Goal: Sustainability, sustainability of social, professional and higher payers

Payer Segmentation

Payers are typically segmented according to their values, what is important to them as individuals and decision makers including what motivates and restricts them.

National Payers	Regional Payers	Local Payers	City, State and DCUs	Patients
<ul style="list-style-type: none"> • Not as visible as individual payers in the market • Take a more of a systemic approach • Require data that goes into a large and not effective size • Generate sophisticated data • Goal to understand how a new product will affect the system • Political issues should also be considered 	<ul style="list-style-type: none"> • Important for countries with diverse climates • Provide guidelines and can develop regional key areas • Almost have national level responsibility but can be divided if • Can manage sophisticated data • Goal to understand how a new product will affect their region • Political and regional budget considerations, funding 	<ul style="list-style-type: none"> • Local entities typically an boundary combined members • Often function as a union, pharmacies, and/or hospitals • Possible to manage sophisticated data • More a greater focus on how will the region react 	<ul style="list-style-type: none"> • Play a role in all decisions on the product in National, Regional and Local levels • Have focus on payers, need to understand the benefits or limitations • Provide cost patient outcomes • Interested in how a new product will affect their patients and how budget 	<ul style="list-style-type: none"> • In some markets and there you will provide specific treatments based on performance and/or cost • In some markets they may be highly sensitive to price and are likely to making payments related to the cost of the medicine if • In other markets they may be less sensitive, making no payments or a fixed payment that is independent of the cost of the medicine

Roles and Responsibilities Throughout Drug Development

Pharmaceutical Companies

Government Affairs and Policy

Regulatory Affairs

Global Operations

Health Economics & Commercial Strategy

Patient Support Services

Value-Based Procurement

Product and Sales Strategy

Marketing & Communications

Key Account Management

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Patient Centricity



Overview

Learn the latest trends and evolutions in patient centricity and how organizations are adopting and adapting certain practices to enhance their patient focus and patient-centric strategies



Learn about:

- Patient centricity and what’s required
- Patient expectations and industry’s role
- Steps your organization can take to strengthen patient centricity
- Future evolutions that influence an organization’s patient focus

Key topics covered:



- What is patient centricity
- How patient centricity has evolved
- Patient expectations
- Industry’s role
- How to activate patient centricity
- Future evolutions



Why this matters?

Most life sciences organizations exist to serve patients. Understanding how to best meet patient needs and align business strategy, infrastructure, processes, and your organization’s overall approach can significantly advance the overall effectiveness and success of your organization.

Example Content:

What is Patient Centricity

Patient centricity is “Putting the patient first in an open and sustained engagement of the patient to respectfully and compassionately achieve the best experience and outcome for that person and their family”.

Uniquely - this definition comes not solely from industry but is driven by the end-user - the patient. (From Patient Centricity & Engagement Conference May 2019)

Current major shift in industry. Concept is not new. What is new is **engaging patients** and understanding what is important to them including what outcomes are important.

Look at THEIR perspectives on benefits and risks and using that to inform drug development and decision-making.

Too often we bring it in too late. Lost opportunities defining research questions, trial design, and to NOT develop products that are not meaningful to patients.

Move from one-off sporadic to more systematic and connected throughout development.

Patient Engagement Roadmap

Setting research priorities <ul style="list-style-type: none"> • Gap analysis • Early horizon scanning • Matching unmet needs with research 	Protocol Synopsis <ul style="list-style-type: none"> • Design • Target population Protocol design <ul style="list-style-type: none"> • Relevant endpoints • Benefit/risk balance • In-/exclusion criteria 	Trial Steering Committee <ul style="list-style-type: none"> • Protocol follow up • Improving access • Adherence 	Data & Safety Monitoring Committee <ul style="list-style-type: none"> • Benefit/risk • Drop-out issues • Amendments
Information to participants <ul style="list-style-type: none"> • Protocol amendments • New safety information 		Investigators meeting <ul style="list-style-type: none"> • Trial design • Recruitment • Challenges • Opportunities can trigger amendments 	Regulatory Affairs <ul style="list-style-type: none"> • MAA evaluation • EPAR summaries • Lay summary of results • Package leaflets • Updated safety communication
Research Conduct and Operations		Dissemination, Communication, Post-approval	
Content Review <ul style="list-style-type: none"> • Content • Visual design • Readability • Language 	Study Reporting <ul style="list-style-type: none"> • Summary of interim results • Dissemination in patient community 	Health Technology Assessment <ul style="list-style-type: none"> • Assessment of value • Patient-relevant outcomes • Patient priorities 	Post-Study Communication <ul style="list-style-type: none"> • Contributions to publications • Dissemination of research results to patient community / professionals

Patient Centricity Evolutions



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Preparing for IND

Overview

Learn what will be different and what is required of organizations as they shift from research into clinical development—from a science /medical, regulatory, and business perspective. This includes understanding all elements of the IND, surrounding elements that regulatory agencies need to consider, and different functional roles and responsibilities.



Learn about:

- Transitioning from pre-clinical to phased clinical trials
- Role of the FDA in reviewing readiness for first inhuman trials
- Tools and processes used to prepare a successful IND
- Common challenges in IND preparation



Key topics covered:

- Overview of Investigational New Drug (IND) process
- Components of an IND
- Roles involved in IND process
- Best practices for IND preparation

Why this matters?

One of the most important milestones and pivotal points a biopharma organization reaches is first-in-human clinical trials. Preparing your organization to obtain status to conduct IND and manage this pivotal transition from research into clinical development is an investment well worth the time to ensure your teams have increased awareness of what to expect and what to prepare for.

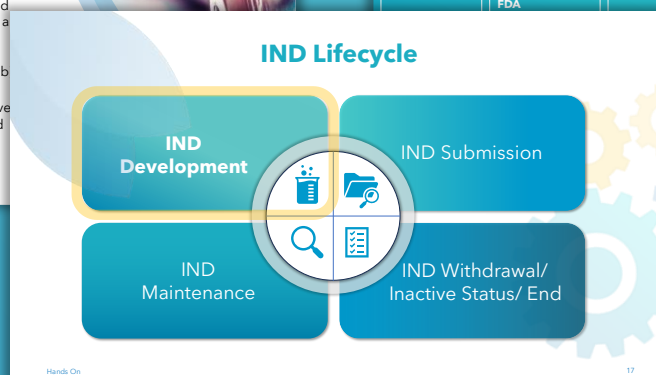
Example Content:

What is a *clinical investigation (protocol) proposed in the clinical trial materials (CTM)?*

Any experiment (except for the use of a marketed drug in the course of medical practice) in which a drug is administered or dispense to, or used involving, one or more human subjects (healthy humans or patients with disease) (21 CFR 312.3(b))

For the purposes (of the IND regulations), an experiment is any use of a drug (whether approved or unapproved) except for the use of a marketed drug in the course of medical practice

Hands On



Pre-IND Meeting Request with FDA

The flowchart outlines the following steps:

- Submit Pre-IND meeting request (MR) to appropriate FDA Division/office**
- FDA Response Meeting Granted Letter (includes meeting format, date, time, location & list of FDA)**
- FDA sends preliminary comments.** (24-28 hours before meeting)
- FDA determines whether to grant or deny meeting. If denied, reason provided.**
- Submit Pre-meeting briefing package to FDA.** (No later than 30 days prior to meeting or written responses)
- Meeting held.** (Within 60 days from FDA receipt of MR)
- FDA send official minutes** (30 days after meeting)

23



Preparing for Phase 2

Overview

Learn how to shift from Phase 1 to Phase 2 clinical trials-how to plan and prepare for this and who to involve. Beyond the fundamentals, also learn common challenges and pitfalls that organizations face in Phase 2, as well as best practices.

Learn about:

- Phase 1 vs Phase 2 / common areas and differentiating points
- What to consider to reach a successful conclusion of Phase 1
- How to prepare for Phase 2-regulatory, clinical development, and business considerations
- The different functions involved in Phase 2
- Common challenges / pitfalls in Phase 2
- Requirements for successful conclusion of Phase 2

Key topics covered:



- Overview of Clinical Trial process
- Review of Phase 1 and 2 key elements
- Identification of Phase 1 and 2 critical success factors
- Challenges to Phase 1
- Phase 2 design considerations
- Phase 2 roles and responsibilities
- Best practices / lessons learned for Phase 2

Why this matters?

When organizations are moving into Phase 2 clinical trials, the stakes increase exponentially, not only with larger patient groups, but also more complex clinical trial requirements. Helping your organization plan and prepare for Phase 2, or even optimize your in-flight Phase 2, is a great investment toward securing your success.

Example Content:

Biopharma R&D Team Composition

- Pre-clinical**
 - Team Lead
 - Project Manager
 - Research
 - Pharmacology
 - Toxicology
 - Clinical Data Science
 - Quality
 - Regulatory
 - Production
- Clinical**
 - Team Lead
 - Project Manager
 - Medical
 - Clinical Operations
 - Drug Safety
- Post-Marketing**
 - Team Lead
 - Project Manager
 - Medical
 - Clinical Operations
 - Clinical C
 - Drug Safe

Clinical Trials Summary

Phase	Focus	Duration	Review
Phase 1	Safety		
Phase 2	Safety and effectiveness		
Phase 3	Safety and effectiveness	2 – 5 years	
NDA/BLA Review			1 year
Phase 4	Post-market review		

P1 to P2 success rate: 31%
P3 to NDA/BLA success rate: 58%
P1 to approval success rate: 10%

Source: BiotechPrimer

Why Patient Centricity?

In terms of research and development, many pharma companies are working hard to incorporate strategies to achieve patient centricity. The term 'patient centricity' has a different meaning than it had about ten years back. Today, patients are well aware of their health conditions, and they prefer to receive clear and transparent healthcare services. Healthcare service providers, pharma companies, and medical practitioners are looking towards patient centricity as a solution to bridge the gap between patient demands and the available healthcare options.

Ramping-up to Phase 3

Overview

Learn about the key steps and requirements to successfully enter Phase III clinical trials and conduct other, related business activities, such as cross-functional roles and responsibilities, that support this transition. Learn how to improve chances of Phase III success by learning lessons from other case studies.



Learn about:

- The elements that contribute to Phase 2 success
- Pulling through Phase 2 elements to lead to Phase 3 success
- Addressing challenges anticipated in Phase 3 through study design
- Leading and integrating teams and processes at the needed junctures for Phase 3 success
- Other key considerations for Phase 3 success

Key topics covered:

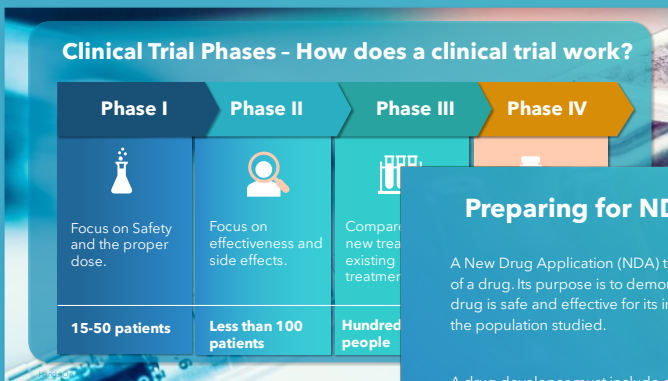


- Review of Phase 2 and 3 key elements
- Identification of Phase 2 and 3 critical success factors
- Challenges to Phase 3
- Phase 3 design considerations
- Phase 3 roles and responsibilities
- Other Phase 3 considerations

Why this matters?

While getting to Phase III in life sciences product development is an achievement in and of itself, there's no assurance of Phase III success. Additionally, Phase III presents a number of challenges and complexities that are not encountered in earlier stages. Spending time understanding the different requirements of Phase III and how to prepare for these while learning from the successes and challenges of other organizations is a great investment in time and your organization's potential Phase III success.

Example Content:



Preparing for NDA / BLA

A New Drug Application (NDA) tells the full story of a drug. Its purpose is to demonstrate that a drug is safe and effective for its intended use in the population studied.

A drug developer must include everything about a drug—from preclinical data to Phase 3 trial data—in an NDA. Developers must include reports on all studies, data, and analyses. Along with clinical results, developers must include:

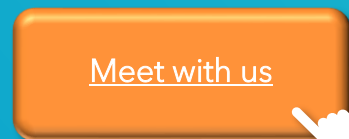
- Proposed labeling
- Safety updates
- Drug abuse information
- Patent information
- Any data from studies that may have been conducted outside the United States
- Institutional review board compliance information
- Directions for use



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Regulatory Affairs



Overview

Learn about the role of Regulatory Affairs throughout the life sciences product development and post-marketing processes. Learn the phases, requirements, and regulatory submissions in which they play a role or lead.



Learn about:

- The role of the U.S. FDA in evaluating, approving, and regulating medicinal and other products
- The different types of regulatory filings and submissions
- The different types of regulatory approvals and requirements for each
- The requirements for drug advertising, promotion, and labeling
- The role of internal Regulatory Affairs functions

Key topics covered:



- FDA regulatory framework
- FDA regulations and authority
- Regulatory phases in drug development and product lifecycle management
- Regulatory approval pathways
- Drug advertising, promotion and labeling
- Role of industry Regulatory Affairs functions



Why this matters?

Regulatory Affairs plays a critical role in product development in life sciences. Without this function and their specialization, life sciences products would not make it to market and sustain their licensure. Whatever your role, you touch product development in some way, shape, or form in your organization. It's important that all functions understand this critical linchpin in licensing and sustaining licensure of your products.

Example Content:

From idea to market to clinical practice

The path to a marketed drug involves a long journey through basic research, discovery of the medicine, preclinical development tests, increasingly complicated clinical trials with humans, and regulatory approval by the Food and Drug Administration (FDA).

Who oversees the FDA?

There are various oversight entities - Government and Congressional:

- Institute of Medicine (IOM)
- Government Accountability Office (GAO)
- Office of Inspector General (OIG)
- Congressional committees

FDA regulation is subject to periodic review and reform by Congress and regulators, with input or challenges from other stakeholders.

In addition, FDA regulation increasingly expands beyond US borders in light of the globalization of the supply chain for FDA-regulated products.

Mission of the FDA

The FDA's mission is protecting and promoting public health as both:

- A consumer protection agency



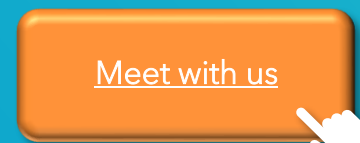
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Preparing for Commercialization



Overview

Learn what to prepare for and when, including what risks may commonly exist and how to mitigate these, as your business, product, or service moves closer to the point of commercialization, and therefore, revenue-generation.



Learn about:

- Effort and skill needed to commercialize a product
- Determining strategy and tactics needed for successful launch
- How to work with launch teams and where responsibility lies
- Aligning patient and customer needs to business success



Key topics covered:

- Steps needed for Commercialization
- Roles involved in Commercialization
- Risks and barriers to successful Commercialization



Why this matters?

One of the most important milestones for a life sciences organization is to reach the point of commercialization, where your product or service is ready for marketing and sales. This may be the first time that your organization becomes revenue-generating. With such a critical milestone at hand, it's important to understand what you prepare for and how to mitigate risks to ensure your organization meets its financial, strategic, and operational goals and objectives.

Example Content:

1 Strategy 1: Making Data-Driven decisions

Data-driven decisions gathered from patients, customers, and customer-facing roles on greatest needs

- Positive Phase 3 results
- Health Economics and Outcome Research (HEOR) strategy
- Value proposition

Building Customer Advocacy

Customer advocacy was far easier to establish given two factors:

1. Front-line HCPs were the center of attention and

Building some awareness of usual customer advocacy is necessary and usually entails:

- Peer-to-peer engagements
- Encouraging brand awareness and brand acceptance among HCPs
- Clarity and transparency on market access and reimbursement

Timing is of the Essence

Pfizer's approach was appropriately named "project light speed" because of the need to move so quickly.

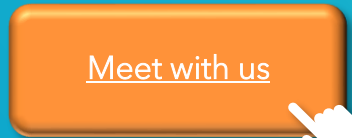
Phase	Drug Discovery	Preclinical	Clinical Trials	FDA Review	LG Scale MFG
Compounds	5,000 - 10,000	250			
INDs Submitted					
Number of patients			PHASE 1: 20-100 PHASE 2: 100-500 PHASE 3: 1,000-5,000		
Timeline	3-6 Years		6-7 years		0.5 - 2 Years
Key Milestones			NDA Submitted	ONE FDA-APPROVED DRUG	Phase 4: PostMarketing Surveillance

Typical pharmaceutical product development timeline and number of compounds needed in the different phases to obtain one FDA-approved drug.

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HANDS ON

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