

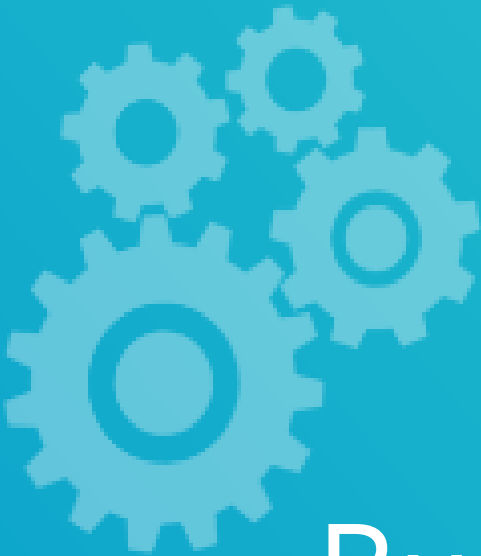


# Hands On Learning

Learning Catalog

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# 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:



**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.

**P&L Statement Fundamentals**

**Types:**

- 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 determine the true profitability of the product.

**The Role of the Budget**


The role of the budget is to focus, define the strategic direction of the business, and realize 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.
  - Work a clear dollar budget for sales that has the market share strategic goal built into it.

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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', 'Development', 'Commercialization', and 'Sustained', and rows for various criteria like 'Market fit', 'Financial viability', 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)

# Advanced Strategic Planning

## Overview

Advance and accelerate your strategic planning capabilities by critically evaluating strategies that have been both successful and unsuccessful, while learning a contemporary strategic planning model and how to apply this to your organization.



### Learn about:

- Latest trends and learning in strategic planning
- Elements that create a good and bad strategy
- Models / steps to consider when building your strategy
- Translating your strategy into a strategic vision (narrative)
- Planning for strategy implementation and monitoring execution

### Key topics covered:



- Latest insights on strategic planning from thought leaders
- Practical examples
- Bad vs. good strategy
- Designing strategy
- Refining strategic vision
- Planning strategy implementation and monitoring execution



### Why this matters?

Organizations thrive and fail by the quality and effectiveness of their strategies. Defining a successful strategy is not something an organization or leader wants to leave to chance. Focusing on what makes a good strategy and how to apply this to your organization is an investment in time and learning that will pay for itself time and again.

## Example Content:

**Markets where business competes**

Source of competitive advantage	BROAD	NARROW
<b>DIFFERENTIATION</b>	Cost Leadership	Cost Focus
<b>COSTS</b>	Differentiation Leadership	Differentiation Focus

**PORTER'S COMPETITIVE ADVANTAGE**

Competitive advantage within an industry can be reached by pursuing either "differentiation" or "cost leadership" and is created through aggressive marketing, innovative design, or product/service quality. The focus is on existing market and/or industry.

**High**

**OVER VALUE**

**Blue Ocean Shift**

**Focus**

Applied to strategy, 'focus' has two meanings: first, it denotes the

**Blue Ocean Strategy**

Blue Ocean strategy pursues both differentiation and low cost to open new market space and create new demand. It aims to create and capture uncontested market space, and as a result make the competition irrelevant. It is based on the view that market boundaries and industry structure are not a given and can be reconstructed by the actions and beliefs of industry players.

Compete in existing market  
**RED OCEAN**

Create new market  
**BLUE OCEAN**



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# 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 combined ideas that have emotional resonance as well as functional practicality. What's worth to run a business based on feeling, feeling, and practicality can be just as important. The integrated approach of the..."

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

**User Stories & Team Backlog**

Team Backlog

User Stories for a System

- 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. The criteria are:

- Acceptance Criteria:
  - User can only rate a test in 30 days of updated test.
  - The email user provides must be in a test email.
  - Subscribers from email that can only be used when there are 200+ subscribers.
  - The email user must be able to register criteria.
  - The email user must be able to register criteria.
  - The email user must be able to register criteria.

**Design Thinking and Agile vs Traditional**

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



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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	YTD	Proposed End Per. Rate	Proposed End Per. Total
Office Space			\$2,000,000
Multi-tenanted	12	\$1,000,000	\$12,000,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Multi-tenanted	12	\$800,000	\$9,600,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000
Office			\$1,000,000
Multi-tenanted	12	\$100,000	\$1,200,000

#### RecyX

Project Start: Sun, 4/15/2022

Display Week: 1

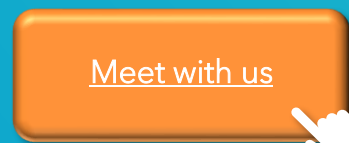
Mar 15, 2022 - Mar 21, 2022

Task	ASSIGNED TO	RESTARTS	START	END
<b>Final Phase</b>				
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		3/28/22	4/1/22

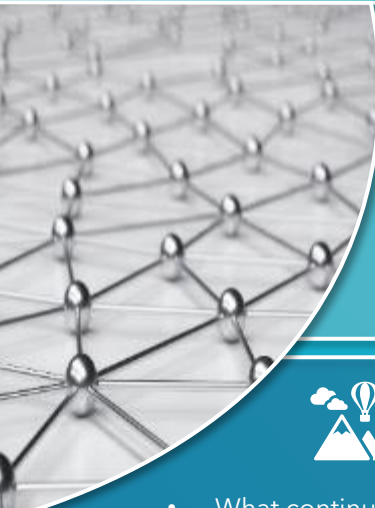
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# Business Process & Continuous Improvement



## 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.

## Example Content:



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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

Hands On



**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.

### Being a Great Consultant

1. **Discovery**
2. **Education and Value Positioning**
3. **Expectation setting**
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 ...

### Co-Creation

Direct learning from stakeholders

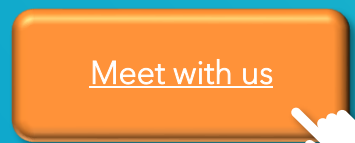
Quick idea generation & testing

Experiencebased learning

New sources of value creation

Value Partnerships

Stakeholders Leverage on resource diversity



# 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 pages:

- Learning from Your Decisions:** Discusses how to learn from past decisions, mentioning that you should consider those situations and how they compare with your current ones.
- Intuitive Decision-Making (Heart vs. Head):** Explores the difference between intuitive and analytical decision-making.
- Understand Your Decision-Making Style:** A central page with a checklist of questions to help identify one's style:
  - 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?
  - When 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?
- Five of the Most Common Decision-Making Traps:** Lists common pitfalls in decision-making, such as overconfidence and confirmation bias.



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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 consists of three slides:

- Different Types of Meetings:** A table with two columns: 'Meeting Type' and 'Description'. It lists various meeting types like 'One-on-one meeting', 'All Hands meeting', 'Project team meeting', etc.
- When to Have and Not Have Meetings:** A slide with a checklist of guidelines for when to schedule a meeting and when to avoid one.
- Typical Meeting Roles & Responsibilities:** A table with seven columns representing different 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

- Cost of sold goods is 200K. It is also charged to income for a total of \$30,000.
- The cost of sales has \$20,000 and the balance goes into \$10,000. Cash sales: \$10,000 on Marketing and \$5,000 on Technology. HR & Admin: \$12,000. Other marketing expenses: \$2,000.
- Cash sales: \$20K. In-house and paid: \$1,200 for internet expenses. Cash: \$200.
- Cash sales: a variation of \$12,000 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 level, indirect costs are allocated as follows:

Direct	800,000		
Indirect	200,000		
Manufacturing	800,000		
The fixed overhead cost control is allocated as follows:			
	A	B	C
Production	600 units	200 units	200 units
Material	50	60	30
Labour	300	100	100

How much do you expect to be paid for services 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, why 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 40 global innovators focus on engaging customers and on fully market-ready with the "lean Startup" and "fail to be cool" attitude of
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 market success.

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)

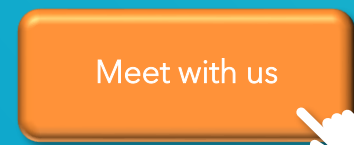
Ideation

- How would Google do it?
- Flip the Problem
- Random Words
- World Possible Idea
- Empathy Mapping
- Wildcard R&D
- 8
- 8

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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

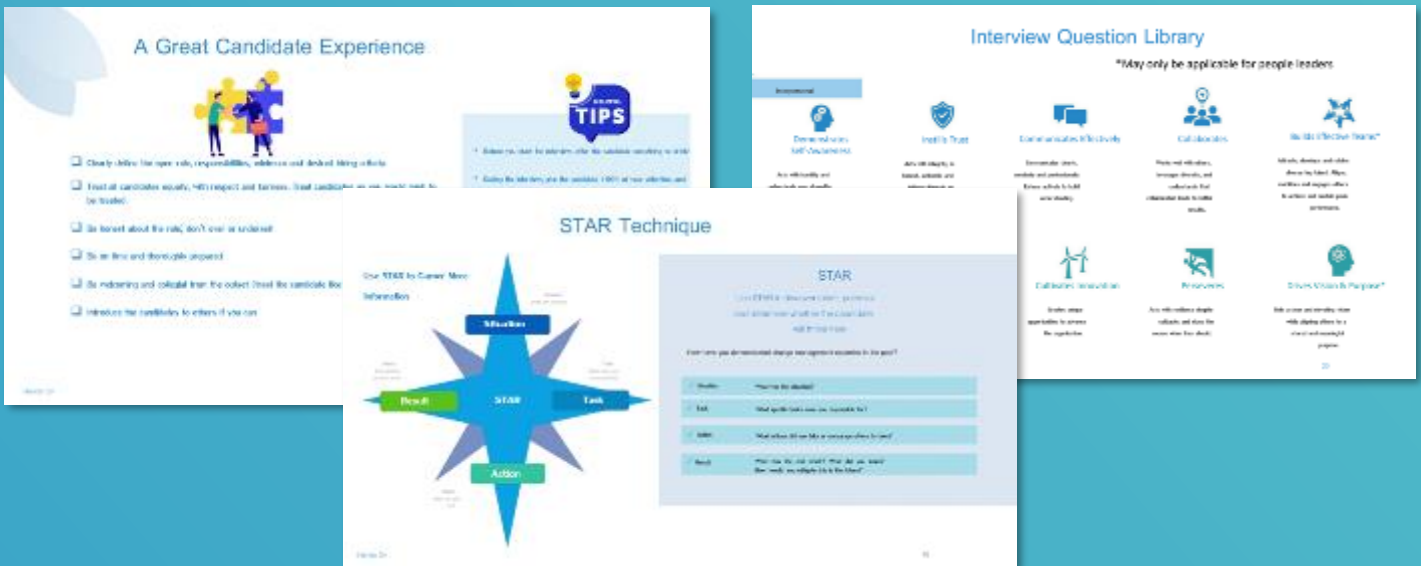
## Key topics covered:

- 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:** Lists key principles such as 'Clearly define the open role, responsibilities, education and desired living skills', 'Treat all candidates equally, with respect and fairness', and 'Be honest about the role, don't over-promise'.
- Interview Question Library:** A grid of icons representing various interview topics like 'Diversity and Inclusion', 'Problem Solving', and 'Communication Skills'.
- STAR Technique:** A diagram showing the STAR model (Situation, Task, Action, Result) with a central 'STAR' star and a table of example questions for each component.

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# Intro to AI

## Overview

Learn the fundamentals of AI - what is everyone taking about and its many different forms, shapes and applications. Understand how organizations are using AI for both technical and non-technical activities. Extrapolate how you might use AI to advance your function.



### Learn about:

- What is AI and why it's important to know about
- The impact AI is having already on broader society and organizations
- Current examples of AI applications in organizations
- How non-technical roles can consider using AI

### Key topics covered:

- Impact of AI
- Uses of AI in Business
- Non-Tech Application of AI
- Next Trends / Evolutions in AI



### Why this matters?

AI is becoming more and more prevalent in organizations across industries and of all sizes - from start-ups to bellwethers. It's important that your employees and leaders, irrespective of function, understand the general nature of AI and how they can potentially use this to the business's advantage.

## Example Content:

**Different Types of AI**

- 1 Reactive machines
- 2 Limited memory machines
- 3 Theory of mind machines
- 4 Self-aware machines

**Key Points to Remember**

- Responsible development and deployment of AI is crucial to mitigate potential risks and maximize its positive impact on society.
- Continuous dialogue and collaboration between policymakers, researchers, and the public are needed to address ethical and societal implications of AI.
- Investing in education and upskilling programs is important to prepare the workforce for the changing job landscape due to AI advancements.

**How does Virtual Reality Intersect with AI**

AI by enabling highly interactive and... virtual world to respond and adapt to... and personalized experience with... dynamic narratives; essentially making the... responsive to user input.

Each technology benefits from the... feeds data to learn. VR provides simulated... able training grounds for AI models.



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# Intro to Generative AI (AI 201)

## Overview

Learn the more contemporary form of AI used in many leading organizations - Generative AI. Understand how Generative AI evolves this field and affords businesses with opportunities to better scale their operations by creating a myriad of efficiencies.



### Learn about:

- Understanding Generative AI and why it's important to business
- Understanding the distinction and different forms of Generative AI
- Understanding how organizations use Generative AI for business purposes
- Understanding how your function may use Generative AI for optimal functional performance

### Key topics covered:

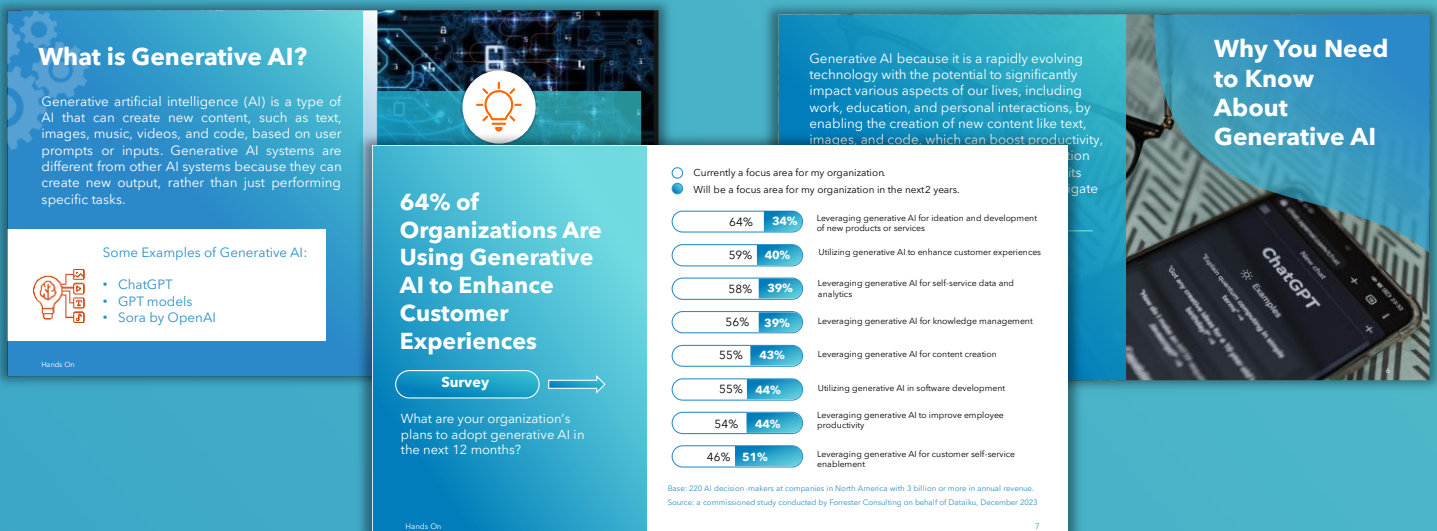
- Difference between AI vs Generative AI
- Different forms of Generative AI
- Organizational uses of Generative AI
- Applying Generative AI to different functions



### Why this matters?

Generative AI is the new norm in AI applications in businesses across industries and of all sizes. It's important that your employees and leaders understand what Generative AI is, how leading organizations are already using this, and what implications and potential uses may exist for your organization.

## Example Content:



**What is Generative AI?**

Generative artificial intelligence (AI) is a type of AI that can create new content, such as text, images, music, videos, and code, based on user prompts or inputs. Generative AI systems are different from other AI systems because they can create new output, rather than just performing specific tasks.

Some Examples of Generative AI:

- ChatGPT
- GPT models
- Sora by OpenAI

**64% of Organizations Are Using Generative AI to Enhance Customer Experiences**

Survey

What are your organization's plans to adopt generative AI in the next 12 months?

○ Currently a focus area for my organization.  
● Will be a focus area for my organization in the next 2 years.

64%	34%	Leveraging generative AI for ideation and development of new products or services
59%	40%	Utilizing generative AI to enhance customer experiences
58%	39%	Leveraging generative AI for self-service data and analytics
56%	39%	Leveraging generative AI for knowledge management
55%	43%	Leveraging generative AI for content creation
55%	44%	Utilizing generative AI in software development
54%	44%	Leveraging generative AI to improve employee productivity
46%	51%	Leveraging generative AI for customer self-service enablement

**Why You Need to Know About Generative AI**

Generative AI because it is a rapidly evolving technology with the potential to significantly impact various aspects of our lives, including work, education, and personal interactions, by enabling the creation of new content like text, images, and code, which can boost productivity, innovation, and efficiency.

ChatGPT



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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**
  - Recognize the need for change
  - Examine what needs to change
  - Examine the resistance of all behaviors and attitudes
  - Develop a change support plan
  - Manage and coordinate the details and resources
- Change**
  - Plan the change
  - Execute the change
  - Monitor progress
- Refreeze**
  - Plan the change
  - Execute the change
  - Monitor progress

### Resistance to Change

Area of Resistance	Definition	Rating
Lack of understanding of the purpose of the program	There may be a lack of understanding of the purpose of the program.	1
Lack of support from leaders and/or the organization	If people perceive that they are not supported, they will not be as committed to the program. Their acceptance is essential to success.	2
Not being in a good mood for the change	Employees in a negative mood will not be as committed to the program. They will not be as motivated to change.	3
Overcoming resistance to change	Employees in a negative mood will not be as committed to the program. They will not be as motivated to change.	3
Lack of resources and/or inability to perform the new or different tasks	Employees in a negative mood will not be as committed to the program. They will not be as motivated to change.	4
Change involves breaking old habits and creating new ones	Employees in a negative mood will not be as committed to the program. They will not be as motivated to change.	5

### Typical Change Management Steps

- 1 Assess**  
To begin with, we need to assess the need for change and the current state of the organization. This will involve the use of various tools and techniques.
- 2 Prepare**  
After assessing the need for change, we need to develop a plan of action. This will involve the use of various tools and techniques.
- 3 Plan**  
Once the plan is developed, we need to ensure that it is realistic and achievable. This will involve the use of various tools and techniques.
- 4 Implement**  
The implementation of the change will be the most critical part of the process. This will involve the use of various tools and techniques.
- 5 Sustain**  
If the change implementation is successful, the next step is to ensure that the change is sustained. This will involve the use of various tools and techniques.



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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 'Repeatibility', '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:

**Competitor Analysis**

Competitor A, Competitor B, Competitor C

Brand, Social, Conversion Rate, Retention Rate, Brand Visibility

Message, Traction

**Internal Analysis**

We earned gross revenue of \$23M for the last fiscal year, a 20% increase from the previous year.

Cost, Revenue, Market Value

Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

**Environmental Influences**

Strategy and positioning

Competitor behaviors, Customer feedback, Market value

MARKET

EXTERNAL

Institutional and political, Social and economical, Technological



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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

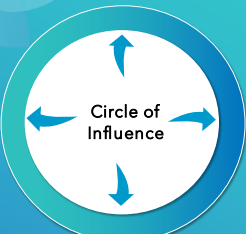


### Why this matters?

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
<b>I. Activities</b> <ul style="list-style-type: none"> <li>• Crises</li> <li>• Pressing problems</li> </ul>	<b>II. Activities:</b> <ul style="list-style-type: none"> <li>• Prevention, PC activities</li> <li>• Relationship building</li> <li>• Recognizing new opportunities</li> <li>• Planning, recreation</li> </ul>
<b>III. Activities:</b> <ul style="list-style-type: none"> <li>• Trivial, busywork</li> <li>• Some mail, some calls</li> </ul>	<b>IV. Activities</b> <ul style="list-style-type: none"> <li>• Trivial, busywork</li> <li>• Some mail, some calls</li> <li>• Time wasters</li> <li>• Pleasant activities</li> </ul>

### Sharpen the Saw: 4 Dimensions of Renewal

#### Physical 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:

- Eat well
- Get sufficient rest and relaxation
- Exercise on a regular basis to build endurance, flexibility, and strength

#### Spiritual Dimension

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:

- Practice daily meditation
- Communicate with nature
- Immerse yourself in great literature or music

#### Mental Dimension

The goal of renewing our mental health is to continue expanding our mind.

To renew yourself mentally, you can:

- 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

#### Social / Emotional Dimension

The goal of renewing ourselves socially is to develop meaningful relationships.

To renew yourself emotionally, you can:

- 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

- ❑ Don't be the hero in your story
- ❑ Don't be afraid to speak "off the cliff" occasionally
- ❑ Don't just read the slides
- ❑ Don't use the podium or any other device as a crutch

### Repetition and Audience Connection

What Is → What Could Be → What Is → What Could Be → What Is → What Could Be → New Bliss (New Form)

Source: Nancy Duarte, Author and Communication expert

### Determining Your Storytelling Strategy

<p><b>L</b></p> <p><b>Logos = Logic</b></p> <p>The use of logic, rationality, and critical reasoning to persuade. Logos appeals to the mind. Logos seeks to persuade the audience intellectually.</p> <p>Some Examples of Logos:</p> <ul style="list-style-type: none"> <li>❑ Appeal to the heart/emotion</li> <li>❑ Source or testimony</li> <li>❑ Personal anecdotes or stories</li> <li>❑ Personal connections</li> <li>❑ Imagery and figurative language that provokes an emotional response</li> <li>❑ Visual images or words that inspire you to empathize or have compassion towards the idea/topic</li> <li>❑ Powerful words, phrases, or images that stir up emotion</li> <li>❑ Details that come from subjective reporting</li> </ul>	<p><b>P</b></p> <p><b>Pathos = Emotion</b></p> <p>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.</p> <p>Some Examples of Pathos:</p> <ul style="list-style-type: none"> <li>❑ Appeal to the heart/emotion</li> <li>❑ Source or testimony</li> <li>❑ Personal anecdotes or stories</li> <li>❑ Personal connections</li> <li>❑ Imagery and figurative language that provokes an emotional response</li> <li>❑ Visual images or words that inspire you to empathize or have compassion towards the idea/topic</li> <li>❑ Powerful words, phrases, or images that stir up emotion</li> <li>❑ Details that come from subjective reporting</li> </ul>	<p><b>E</b></p> <p><b>Ethos = Ethics and Credibility</b></p> <p>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.</p> <p>Some Examples of Ethos:</p> <ul style="list-style-type: none"> <li>❑ Appeal to the writer/speaker's believability, qualifications, character, relevant biographical information</li> <li>❑ Use of credible sources (experts, scholars) - and accurate citation</li> <li>❑ Experience and authority: person knows the issues and has experience in the field</li> <li>❑ Appropriateness: knows the audience and context of situation</li> <li>❑ 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.</li> </ul>
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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
<b>Responsible</b>	Does the work to complete the task	At least 1 per task
<b>Accountable</b>	Delegates the work and is ultimately the last one to review the task or deliverable if it's deemed complete	Limit to 1 per task
<b>Consulted</b>	Provides input based on how the variables impact their future work or provides input based on their domain of expertise	No max or minimum
<b>Kept Informed</b>	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



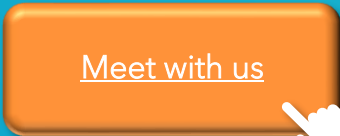
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# Product Lifecycle Management



## 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:



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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?

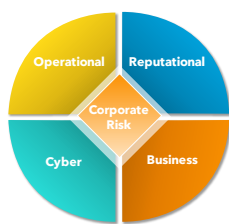
- It's easier to spot projects in trouble.
- There are fewer surprises.
- There's better quality data for decisionmaking.
- Communication is elevated.
- Budgets / resource plans rely less on guesswork.
- The expectation of success is set.
- The team remains focused.
- Escalations are clearer and easier.

### What is Risk Management?

Risk management is the identification, evaluation, and prioritization of risks followed by coordinated



### New Composition of Corporate Threats



**Operational**

- Health & Safety
- Asset protection
- Executive protection
- Physical security
- Traveling personnel
- Delivery logistics

**Cyber**

- Data breaches
- Leaked credentials
- Phishing
- Ransomware
- Advanced persistent threats
- Illicit sales

**Reputational**

- Delivery disruption
- Brand attacks
- Company controversy
- Media & commentary
- Social responsibility
- Public figure activity
- Conferences & events

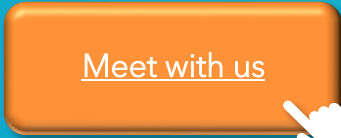
**Business**

- 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 diagram with four stages: 'SHARE RESULTS' (Meetings/Discussions), 'DEFINE PROBLEM' (Data & Facts), 'TEST SOLUTIONS & IMPLEMENTATION' (PDSA Cycles), and 'RESULTS & PROCESS EVALUATION' (PDSA Cycles).
- Fishbone Diagram:** A diagram with 'EFFECT' (Staff performing unnecessary repeat lab tests) at the head. The main spine is divided into categories: '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), 'ENVIRONMENT & TOOLS' (Poor disposable equipment, Poor quality, no funds, Not properly selected, Damaged equipment, Poor maintenance, Unskilled personnel no funds), 'MOTIVATION' (Staff careless in storage, Lack of motivation, Insufficient compensation), and 'ORGANIZATIONAL SUPPORT' (No supervision system, Lack of support in continuous improvement, Insufficient budget).
- RCA Analysis Example:** A flowchart starting with 'Late for work' (marked with a red 'A'). It branches into 'Missed the train' and 'Woke up late'. 'Woke up late' leads to 'Stayed up late' (due to 'Too many things to do') and 'Wanted to binge watch a show'. 'Stayed up late' leads to 'Alarm didn't go off' (due to 'Forgot to set it') and 'Battery died'. 'Alarm didn't go off' leads to 'Not considered a priority' and 'Not everyone attends'. 'Battery died' leads to 'Faulty batteries, cannot control'. The final 'Root Cause' list includes: 1. Poor prioritization, 2. Stayed up late, 3. Faulty batteries, cannot control, 4. Poor scheduling, 5. Team meetings not a team priority.

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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.

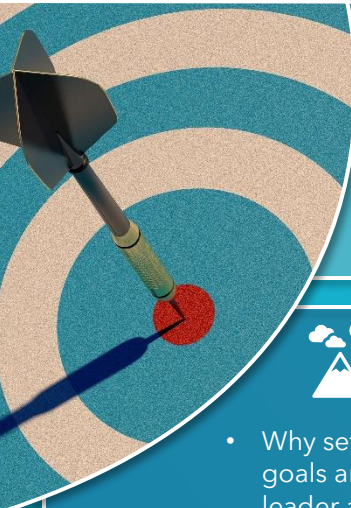
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# Setting Goals & Expectations



## 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

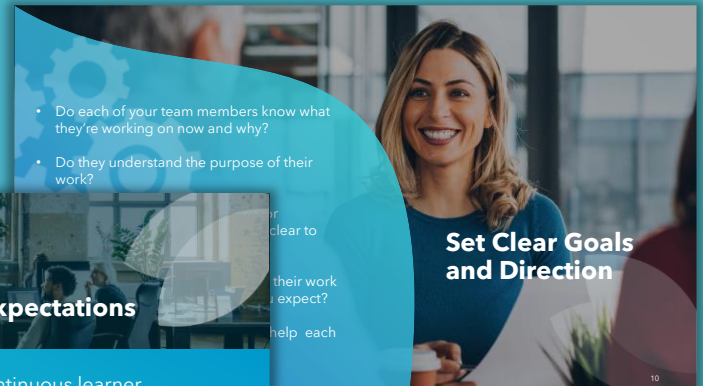
- 01**  Setting goals and expectations and reflecting on them improves success.
- 02**  Goals are good for motivation and vice versa.
- 03**  Setting clear goals and expectations that are challenging yet within one's skill level are a powerful contributor to finding one's path.
- 04**  Hope and optimism 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

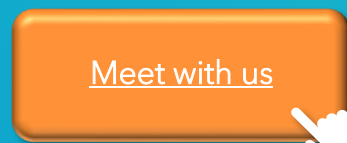


Do each of your team members know what they're working on now and why?

Do they understand the purpose of their work?

### Set Clear Goals and Direction

10







# 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

8

5



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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

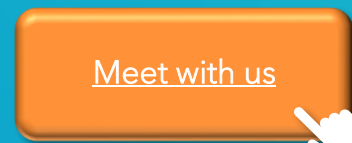
- Accomplish More in Less Time**  
Using your time effectively means that you're able to accomplish more in a shorter period. Time management skills can reduce the cognitive load or effort involved in completing tasks. So, you can work smarter—not harder.
- Reduce Stress**  
Planning and organizing your 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 able to prioritize and schedule work, you can better able to achieve goals and objectives.
- Live Your Values**  
Being in control of your time also allows you to live your values and spend time with people that matter most to you. Live your values at work.

### 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

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

**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.

**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



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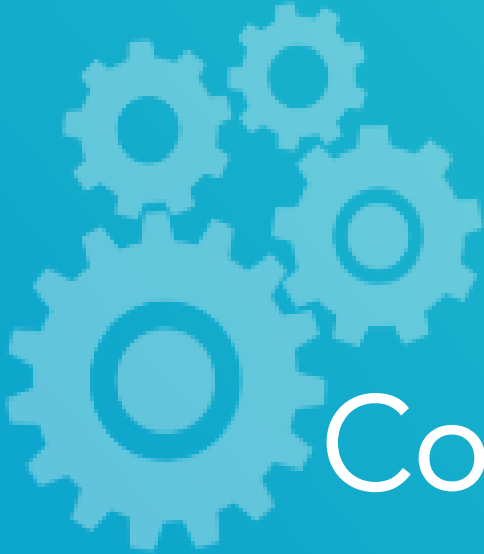
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# Communication Skills

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.

## Example Content:

The example content consists of three slides:

- How The Brain Really Works:** A diagram titled 'THE FIVE BRAINS' showing the Neocortex (Executive Brain), Prefrontal Cortex (Executive Brain), Limbic Brain (Emotional Center), Amygdala (Emotional Center), and Primitive Brain (Heart). It lists functions like 'REGULATE CORTISOL', 'EXCLUDING', 'JUDGING', 'LIMITING', 'WITHHOLDING', and 'DICTATING CRITICISMS'.
- 3 Levels of Conversational Intelligence:** A diagram showing three levels: LEVEL I (Wait & See), LEVEL II (Inquire-Experiment), and LEVEL III (Share-Discover). It also mentions 'Co-Creator' and 'TRUST'.
- Distrust & Trust:** A diagram showing the transition from 'Distrust' (Protect) to 'Trust' (Partner). It maps brain regions: Neocortex (Protect), Prefrontal Cortex (Partner), Limbic Brain, and Amygdala (Protect). It also shows 'Listening' and 'WE'.



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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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- 
- 

### 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?



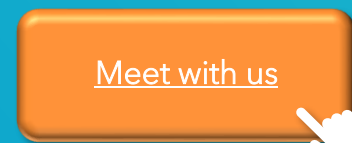
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# Giving & Receiving Feedback



## 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 three main slides:

- When to Ask for or Give Feedback:** A slide with a list of bullet points and a photo of two people in a meeting.
- Practicing Feedback:** A flowchart showing a 7-step process: 1. Pick a partner, 2. Pick 3 scenarios, 3. Understand going and who's receiving the feedback, 4. Make the feedback feedback (circle back), 5. Give the feedback to your partner (circle back), 6. Pick a different scenario, 7. Switch roles. A 'Repeat Above' arrow loops back to step 1.
- Effective vs. Ineffective Feedback:** A comparison slide. 'Effective Feedback' includes: Give in private and in person; Create a safe environment (no blame, no shame); Be specific and right on the target; Offer feedback as a gift; Start with a specific compliment; Focus only on improvement (not capability and knowledge) and not on performance; No past action following feedback; Don't make excuses with negative scenarios. 'Ineffective Feedback' includes: Give in private and in person; Create a safe environment (no blame, no shame); Be specific and right on the target; Offer feedback as a gift; Start with a specific compliment; Focus only on improvement (not capability and knowledge) and not on performance; No past action following feedback; Don't make excuses with negative scenarios.



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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 things been accomplished?

**Middle**

### Power of Stories in Presentations

**Determining Your Storytelling Strategy**

**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.

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# 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.

## Example Content:

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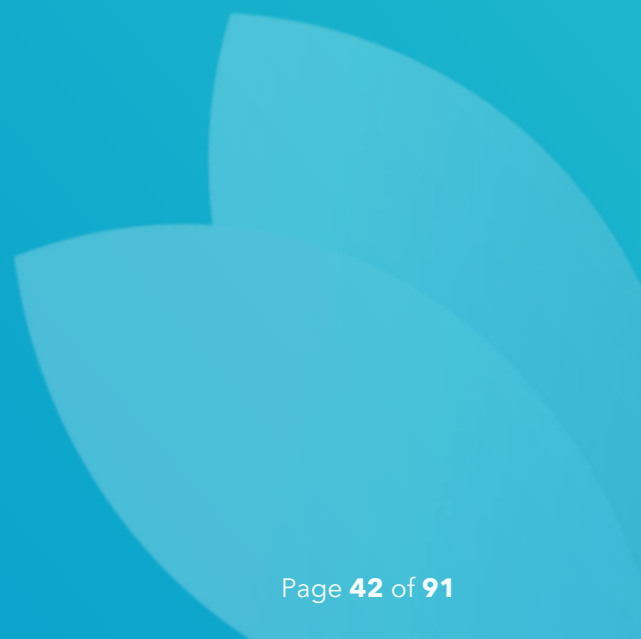
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# Culture

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.

## Example Content:

The example content includes three slides:

- Why DE&I is so Important:** A slide with three main points:
  - It's the right thing to do as an organization.
  - Organizations with diverse teams are more innovative and profitable.
  - Organizations that do not have diverse teams are less likely to attract and retain top talent.
- Diversity is Multidimensional:** A slide featuring a circular diagram with 'Diversity' at the center, surrounded by various dimensions. It lists three key dimensions:
  - Organizational dimensions** – where we work and in our organizations today.
  - External dimensions** – where we are in our personal lives today.
  - Internal dimensions** – who we have truly been all along.
- Different Examples of Bias:** A slide listing various types of bias:
  - Ageism, Gender bias, Ableism/Bias, Height bias, Family Bias, Hair bias, Color/ethnicity bias, Hair bias, Cultural bias, Name bias, Language bias, One-sided bias, Educational bias, Political bias, Gender bias, Sexual orientation bias, and Ability bias.

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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:

**Lift the Team Up**

- Understand that the goal of civility begins with recruiting and hiring
- During interviews, pay attention to how candidates behave
- Ask them to describe their good behavior and give you examples
- Discuss how they handle difficult situations or conversations
- Observe how they speak about their current or former employers
- Follow up with employees who are social with your potential hires, such as on personal info provided by candidates
- Research how candidates behaved in previous jobs

**Addressing Incivility**

If you decide to address an issue at work, it is best to not react in the moment, take a pause, and plan the form your next actions will take. Here's some key tips for doing this:

**Steps to Address Incivility**

1. Try to do this in a public setting, or without speaking to the person.
2. You can start the conversation by stating that you recorded that the behavior.
3. Ask for better ideas to help you have to say.

**Model Email and Conversational Etiquette**

Look at the items below and decide whether they are in the "do" or "don't" list.

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 irritated 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		• Hit Reply All unnecessarily
• Use cell-phones, texting in a respectful time and volume, 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.

## Example Content:

**Systemic and Structural Issues (SSIs)**

- **Exclusive and Hostile Work Environments**- creates conditions for structural oppression
- **Network Gap**- our networks further drive inequality
- **Structural Racism**- policies and procedures could perpetuate inequalities

**How Does Bias Affect**

- ❖ **Our Perception** – how we see people and perceive reality.
- ❖ **Our Attitude** – how we react towards certain people.
- ❖ **Our Behaviors** – how receptive/friendly we are towards certain people.
- ❖ **Our Attention** – which aspects of a person we pay most attention to.
- ❖ **Our Listening Skills** – how much we actively listen to what certain people say.
- ❖ **Our Micro-affirmations** – how much or how little we comfort certain people in certain situations.

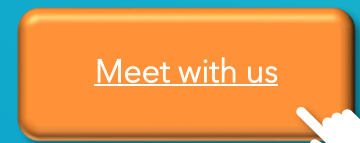
**Being an Ally**

Do's	Don'ts
<ul style="list-style-type: none"> <li>• Express listening</li> <li>• Be open to your implicit bias</li> <li>• Research the history of the struggle in which you are participating</li> <li>• Educate yourself on a way to acknowledge how you part of a system and how things oppressive systems</li> <li>• Use your privilege to amplify (digitally) with personal historical ally support and voice</li> <li>• Learn how to listen and accept criticism with grace, even if it is uncomfortable</li> <li>• Reflect every day to learn how to be a better ally</li> </ul>	<ul style="list-style-type: none"> <li>• Expect to be taught a lesson. Take it and pretend it was the only lesson you to learn and answer your question</li> <li>• Apologize for the good and evil (the "I'm sorry about that" you said to someone has your people in it) as well as the "I'm not a racist" or "I'm not a sexist" or "I'm not a homophobe" or "I'm not a transphobe" or "I'm not a religious bigot" or "I'm not a...")</li> <li>• Believe or think you know best</li> <li>• Take credit for the labor of those who are responsible and of the work others are engaged in to the system</li> <li>• Act as if that every member of an under-represented community has your racial</li> </ul>

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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

ABUNDANCE

Attitudes Beliefs

Shared Goals

Hands On

### 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

Hands On

### Six C's of Collaboration

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

Hands On



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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:

**5 Pillars of Emotional Intelligence**

- Self-awareness**
  - Understands own strengths, weaknesses and how actions affect others. Wishes others to succeed and sees their own contribution to others.
- Self-regulation**
  - Can naturally sense emotions and handle them when needed. Expresses needs, feelings, but instead opt to act with rational and control.
- Motivation**
  - Self-motivated. Able to set and meet goals. Driven to succeed.

**Engaging With Others**

- Self-Awareness**
  - Know your emotions
- Self-Management**
  - Manage your emotions
  - Motivate yourself
- Social Awareness**
  - Recognize and understand other people's emotions
- Manage Relationships**
  - Manage others' emotions

**Adjust Your Listening**

**8 Awareness**

- 1. Are I listening to understand?
- 2. Am I listening, just listening to someone's understanding?
- 3. Can I identify someone's intention and focus on the underlying need or emotion in their language?
- 4. Am I trying to put the other person at ease?
- 5. Am I listening to understand?
- 6. Am I listening to understand?
- 7. Am I listening to understand?
- 8. Am I listening to understand?



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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:

**Trust**

The words to find a person's expertise, reliability, and interest for approval, instead of only focus on content, means how much people trust them. It grows and that's because it's based on behaviors. It's not how we think, it's what we do. It's not how we say it, it's how we do it.

- People will ask themselves "Can I believe you?" Credibility comes from our knowledge, but it's the actions we take that really, the results we project and the consistency with...
- Our reliability answers that question "Can I trust in what you say?" On the same note, it's not how we say it, it's how we do it.
- Integrity is about how you are with others and others, showing our vulnerability to others and our not just wanting to be heard and seen in all we do.

**Presenting to Executives**

1. Start with the bottom line.
2. Respect their time.
3. Be prepared to be interrupted.
4. Be flexible.
5. Be careful.
6. Do your homework.
7. Make the connection.
8. Plan to give stakeholders in advance.
9. Choose words over details.

Tip: Focus on results, not activity.

**Planning to Build Your Executive Presence**

Throughout this course, you will have accelerated action goals. Take a moment to consolidate them.

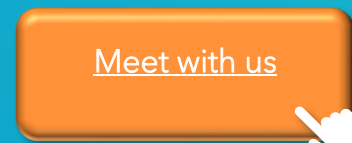
In order to build my executive presence, I need to work on...

- Deckling to take action is greatly enhanced by drawing it together into a detailed and focused plan.
- Make a SMART plan.

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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.

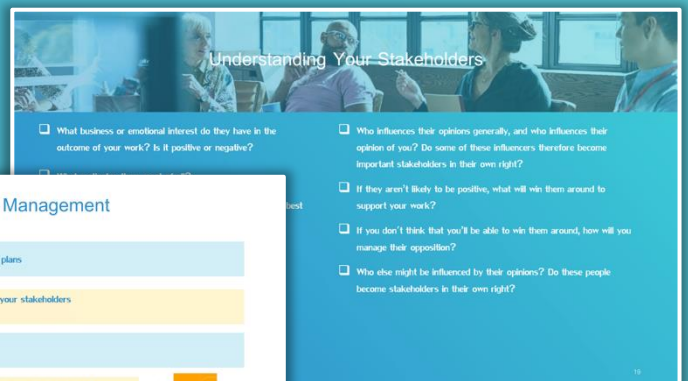
## Example Content:



**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?

16



**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:

**Working with Others ...**

Build	Build trust
Connect	Connect with others' hearts and minds
Grow	Grow our organization by developing others
Create	Create shared direction

**Crucial Conversations Model**

**BEFORE** WORK ON ME FIRST  
Get Unstuck - Start with Heart - Master My Stories

**DURING** SAFETY  
FOCUS OF SHARED MEANING  
SAFETY MOVES

**AFTER** MOVE TO ACTION  
Who does What by When - Follow up

**Transformational Level**

THE LIFE BEHIND THE 'BRAINLY MINDS'

ANYGDALA



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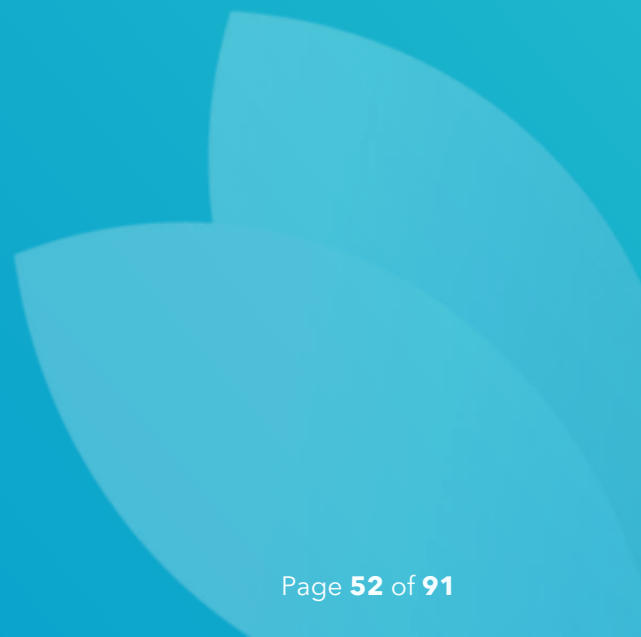
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# Leading Others

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.

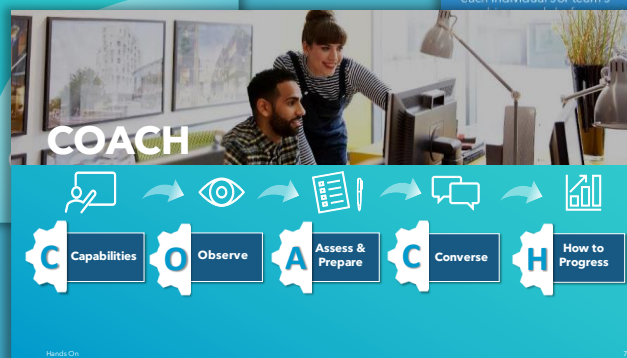
## Example Content:

### 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

SKILL	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


WILL

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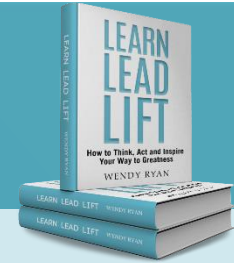
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# Advanced Leadership Skills

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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# 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:

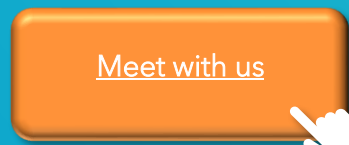
The example content consists of three presentation slides:

- Key Actions You Can Take:** A slide with a central key icon and four action points:
  1. Know the job well to be that of a leader
  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 slide with three main points:
  - T**ransparency
  - R**emove the opposite
  - U**se the input of others
 A flowchart shows: 'Remove the opposite' leads to 'Have updates frequently', which leads to 'Establish clear goals and responsibilities'. 'Use the input of others' leads to 'Communicate often and honestly', which leads to 'Delegate effectively'. 'Have updates frequently' also leads to 'Do what you say you will do', which leads to 'Delegate effectively'.
- A Simple Model for Development and Delegation:** A circular diagram divided into three segments: Strengths (blue), Development Areas (green), and Weaknesses (orange).
  - Strengths:**
    - Current assignments to be filled up at regular
    - Assign to person
    - More assignments
  - Development Areas:**
    - Current assignments to be assigned to be developed with details
    - Challenge
    - Lots of coaching
  - Weaknesses:**
    - All development assignments should be assigned to be developed

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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:



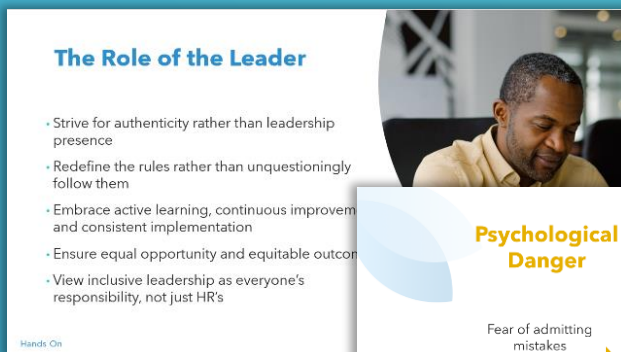
- The Imperative for Diversity, Equity and Inclusion
- Bias and Systemic Discrimination
- The Leader's Role
- Combatting Unconscious Bias
- Creating Psychological Safety for All



### 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

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### 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

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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
-------------	------------------	---------------------------------

EXTERNAL

21

### 6 Signs of a Toxic Culture

<p><b>Bad or unclear communication</b> 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><b>High employee turnover</b> 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><b>Gossipy behavior</b> 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><b>Micromanagement</b> Bosses breathing down employees' necks can cause stress instead of inspiring productivity.</p>
<p><b>Poor leadership and management</b> 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><b>Minimal trust</b> 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>

Hands On

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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:



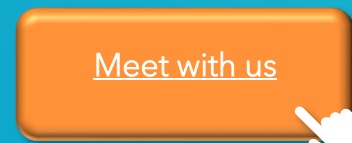
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# Coaching



## 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	Commit and be open to learn and be coached
regular cadence	Ask for coaching when needed
emotional and	Prepare for coaching conversations
understand	Clearly define the situation and where help is needed
clear	Clearly define desired outcome
obstacles and	Listen and clarify as needed
led	Co-create action plans with clear outcomes and timing
	Ask for help when resources are needed or advice to overcome obstacles

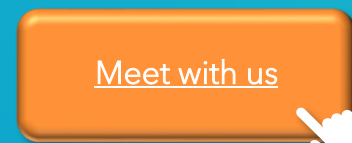
### From GROW to COACH



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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?

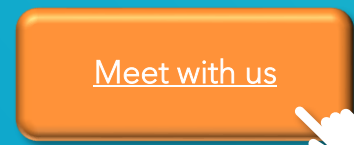
Whether we're formal or informal leaders, we're often delegating tasks. This is also true in peer-to-peer scenarios as well. For most of us, delegation is something that we're doing on a regular basis. It's imperative that we delegate effectively to ensure clarity of tasks, standards and timelines expected, 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".
- The different levels of Delegation**: A diagram showing six levels of delegation based on Trust & Confidence.
  - Level 1**: You bring the task to her and bring out the facts and let her 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 task, make recommendations and we can discuss, but ultimately you will decide.
  - Level 5**: You consider and let me learn what has been decided. Call me if you need support.
  - Level 6**: You consider, decide, and complete the task and let me know when it is done.
- Things that might go wrong with delegation and how to fix them**: A table with 'Problem' and 'Solution' columns.
 

Problem	Solution
People aren't doing what you expect. Why not? How can you fix it?	Clearly explain the required results and what good looks like.
Things aren't done to budget or time. How can you adjust the urgency?	Agree clear priorities, milestones and deadlines.
People aren't doing it because they don't understand the why.	Clear the way for them and explain the reasons why it needs to be done.
People aren't doing it because they don't have the resources or skills.	Provide the resources and skills to do the job.
People aren't doing it because they don't have the authority.	Provide the authority and support to complete the task.
People aren't doing it because they don't have the motivation.	Make sure you have the right incentives and support.



# 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 3<sup>rd</sup> 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**

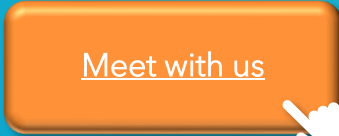
Turn off alarm	Collect clothes	Do morning hygiene	Make breakfast	Choose vehicle	Park vehicle
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**User Sub-Steps**

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





# Leading through Others



## Overview

Learn best practice tips and techniques to manage larger teams, typically with both direct and indirect reports. Understand what's different and, therefore, what's required of you as you lead larger teams and increase your scope and range of influence in your organization.



### Learn about:

- What's different, as we shift from leading others to leading through others
- What's required to be successful as a leader of other leaders
- How to develop other leaders

### Key topics covered:

- Shift to Leading through Others
- Indirect Leadership
- Differing Roles / Responsibilities for Different Levels of Leaders
- Developing Other Leaders

### Why this matters?

Leading larger teams with both direct and indirect reports is not an easy transition, nor one that we necessarily understand how to best manage. Yet, as we lead larger teams, we have increased organizational responsibilities. Equipping senior leaders with the skills required is imperative for their success, the success of their teams, and the organizations they lead.

## Example Content:

### The Fundamental 4 Core Leadership Skills

Applied at the senior level



**SELF AWARENESS**  
Understand your behavior's impact on organizational outcomes.



**COMMUNICATION**  
Effectively communicate goals and inspire trust.

Source: Center for Creativity


### Why Important?

**Functional Ambassador**

- Educating other leaders and groups cross-functionally as to your function's contribution to the enterprise, and your specific mission, vision, strategic objectives and plans, and metrics for success.

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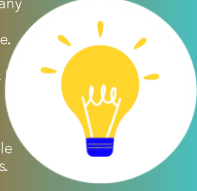


### Start with Your Why

**Example**

While working as an engineer for the Edison Illuminating Company in Detroit, Henry Ford (1863-1947) built his first gasoline-powered horseless carriage, the Quadricycle, in the shed behind his home.

In 1903, he established the Ford Motor Company, and five years later the company rolled out the first Model T to meet overwhelming demand for the revolutionary vehicle, Ford introduced revolutionary new mass production methods, including large production plants, the use of standardized, interchangeable parts and, in 1913, the world's first moving assembly line for cars.



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# 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 slides:

- Observing and Understanding Team Members:** A slide with a list of bullet points:
  - Define good vs. great performance in each of your team roles (think person first, before people)
  - Reflect on past performance and feedback
  - Spend time observing others at work
  - Ask for feedback from partners and stakeholders
  - Avoid self-justification of their effect
  - Be clear about what you're seeing vs. what you want to see
  - Be fair about what you're seeing
  - Connect each individual to strengths and developmental areas to what you see
  - Consider the individual's career interests
  - Align objectives, coaching and development to address strengths, development and interests
- Leadership Expectations:** A slide with a central gear icon and several surrounding icons representing different leadership concepts.
- Leader's Role in Employee Lifecycle:** A circular diagram with a central gear and arrows pointing to various stages: Recruit & Hire, Onboard, Develop, Dismiss, and Retain & Promote.



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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:

**1.** Being an example - humility, authenticity, and trust

**2.** Showing why the work is essential - awareness and purpose

**3.** Encouraging collaboration - community-building and commitment

**4.** Supporting the team's growth and development - foresight and resourcefulness

**5.** Caring for members of the team - empathy and compassion

**6.** Asking for feedback - listening skills

**Traditional Leader**

- Sees leadership as a rank to obtain.
- Uses power and control to drive performance.
- Measures success through output.
- Speaks.
- Believes it's about them.

**Servant Leader**

- Sees leadership as an opportunity to serve others.
- Shares power and control to drive engagement.
- Measures success through growth and development.
- Listens.
- Understands it's not about them.

**Stewardship**

- Take responsibility and

Do you actively lead by example?

Do you look for barriers or roadblocks and remove these for your team?

Do you consider the obstacles your team faces and actively try to remove these?



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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?**

Costs 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 a more high-performing team?
- Poor meeting performance, are team members not listening?
- All members of the team feel able to raise problems and seek input?
- Members of the team never talk about failures or setbacks and instead shift blame?
- 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 high-performing 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

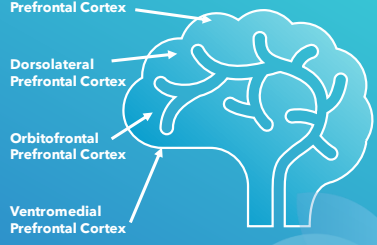
Having a Theory of Mind (TOM)



### 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.





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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?

**STAR**

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

How have you done this 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


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

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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.





# 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 'my abilities' are limited."  
 "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."

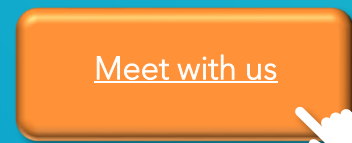
**Things You Can Do**

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 get it now.	It's not clear at all. Can you explain it to me?
This is too hard.	This may take some time and effort.
I can't remember the way to do this.	Even though it's important, let's keep trying.
I just can't do it.	I'm going to learn my way to do it.
I need a bit more time.	Maybe that's not the best solution.
This is so hard, I'll never be able to do it.	Can you help me to try to figure out how to do it, or I can try it with you next time.
If I need more time.	Is it really me that can't do it?
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 list of 4 points: 1. Develop a positive mindset, 2. Practice self-care, 3. Build a support network, 4. Stay focused and motivated.
- Understanding the Neurology of Resiliency:** A diagram showing the brain's role in resiliency. Key areas include:
  - 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.



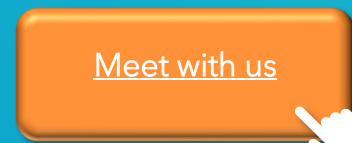
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# Managing Stress and Burnout & Using Learned Optimism



## 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.

## Example Content:

**Signs and Symptoms**

Burnout: In a state of burnout, we may experience ...

- Frustration and feeling drained at the time
- Frequent mistakes or errors on the job
- Constant hesitations while making decisions
- Change in appetite or sleep habits
- Sense of failure and self-doubt
- Loss of motivation
- Increasingly critical and negative outlook
- Excessive satisfaction with some of your accomplishments
- Detached, being scarce in the mood
- Withdrawal from responsibilities
- Isolating self from others
- Talking back to your supervisor
- Exaggerating things, trying to get the blame
- Missing work or coming into work late

**Stress vs. Burnout**

Stress is different than too much stress. It is a natural response to a challenge that demands too much of us physically and mentally. When we are stressed, we can just get everything under control, they can just get everything under control, they can just get everything under control.

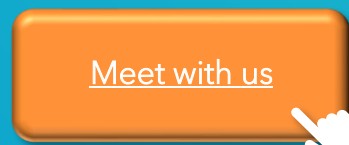
**Seligman's model for developing Optimism: ABCDE ...**

- A** Adversity is a situation that calls for a response
- B** Belief is how we interpret the event
- C** Consequence is the way that we behave, respond, or feel
- D** Disputation is the effort we expend to argue or dispute the belief
- E** Energization is the outcome that emerges from challenging our beliefs

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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.

**Personal Brand Pyramid**

There are many ways to build your brand.

My principles are **Values**

I'm motivated by **Drivers**

I'm known for **Reputation**

My personality is **Behavior**

My strengths are **Skills**

My goal is **Image**

**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.



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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:



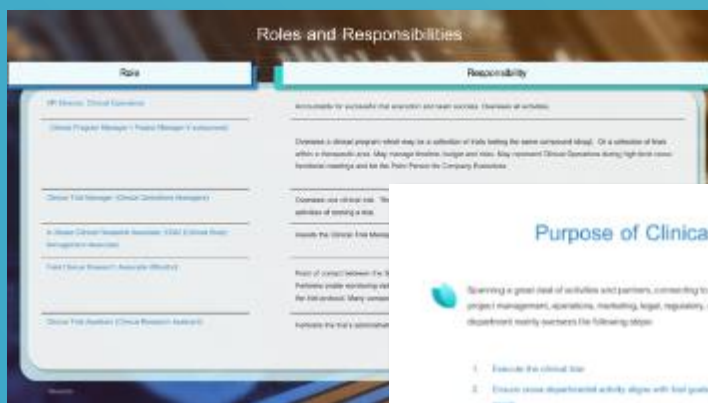
- Overview of clinical trials and operations
- Clinical Operations roles and responsibilities
- Clinical Operations trial phases
- Clinical Operations tools



### 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:



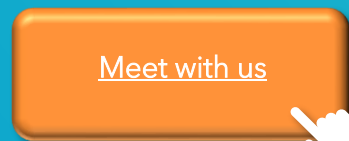
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# Drug Discovery & Development 201



## 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:



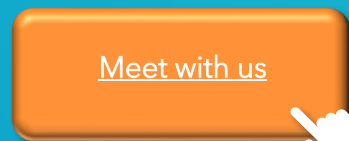
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# Drug Safety



## 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:

**Key Roles in Drug Safety**

- Safety Physicians**: Use their medical expertise to lead the review and evaluation of clinical studies of new products or indications. They are specifically looking for how the product may affect the patient based on safety monitoring for adverse reactions.
- Safety Scientists**: Review all pertinent research findings, data, toxicology and adverse reaction events, with key personnel (i.e. clinicians). These professionals are pharmacovigilance experts – knowledgeable about international relations.
- Clinical Development**: Clinical development runs parallel throughout the drug development process and will get input from safety physicians and scientists when planning and conducting clinical trials.

**Populations to be Considered with Drug Safety**

Special populations that need less consideration because of physical attributes include:

- **Special Populations**
  - Drug response and adverse progression effects between men and women, and to men, greater with pregnant women.
- **Children**
  - Metabolic factors in infants, children, and adolescents are markedly different by comparison to adults.
- **Elderly or Geriatric**
  - Taking multiple drugs, which increases risk for drug-drug interactions.
  - Organ function decline.
  - Less lean body mass, increase in body weight.
  - Increased levels of drug elimination.

When doing a assessment for these special populations, it should be based on findings from clinical trials that included those populations. It should consider the physical features to ensure there is little to no safety risk.

**Why this matters**


**Key Drug U.S. Safety Reports and Plans**

Report	Description
<b>Safety Assessment Report (SAR)</b>	<ul style="list-style-type: none"> <li>• Safety plan and assessment protocol developed during or early in the clinical trial.</li> <li>• Help to detect potential adverse events, make sure safety plans to control harmful events which may occur in an individual or throughout a population.</li> </ul>
<b>Safety Plan</b>	<ul style="list-style-type: none"> <li>• Safety plan and assessment protocol developed during or early in the clinical trial.</li> <li>• Help to detect potential adverse events, make sure safety plans to control harmful events which may occur in an individual or throughout a population.</li> </ul>

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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.

## Example Content:



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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:

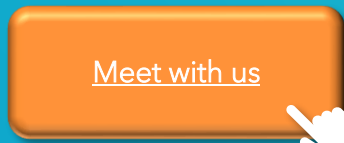
- Organizational Approaches to Compliance:** A slide with a dark background and white text, discussing organizational approaches to compliance.
- Purpose of Healthcare Compliance:** A central white slide with a blue header. It lists two main purposes:
  - Patients:**
    - Protect patients and patient 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)	Regulates the Medicare and Medicaid programs, including coverage, reimbursement, and quality of care.
Department of Justice (DOJ)	Enforces federal criminal laws, including fraud, bribery, and kickback schemes.
State Attorneys General	Enforce state laws, including consumer protection and public health laws.
State Health Departments	Enforce state health regulations, including licensure and public health orders.
State Insurance Commissioners	Regulate the state insurance market, including health insurance.
State Boards of Pharmacy	Regulate the practice of pharmacy, including licensure and regulation of pharmaceuticals.
State Boards of Nursing	Regulate the practice of nursing, including licensure and regulation of nursing practice.
State Boards of Medical Practice	Regulate the practice of medicine, including licensure and regulation of medical practice.
State Boards of Podiatric Practice	Regulate the practice of podiatry, including licensure and regulation of podiatric practice.
State Boards of Chiropractic Practice	Regulate the practice of chiropractic, including licensure and regulation of chiropractic practice.
State Boards of Occupational Therapy	Regulate the practice of occupational therapy, including licensure and regulation of occupational therapy practice.
State Boards of Physical Therapy	Regulate the practice of physical therapy, including licensure and regulation of physical therapy practice.
State Boards of Speech-Language Pathology	Regulate the practice of speech-language pathology, including licensure and regulation of speech-language pathology practice.
State Boards of Audiology	Regulate the practice of audiology, including licensure and regulation of audiology practice.
State Boards of Optometry	Regulate the practice of optometry, including licensure and regulation of optometry practice.
State Boards of Podiatry	Regulate the practice of podiatry, including licensure and regulation of podiatry practice.
State Boards of Dentistry	Regulate the practice of dentistry, including licensure and regulation of dentistry practice.
State Boards of Veterinary Medicine	Regulate the practice of veterinary medicine, including licensure and regulation of veterinary medicine practice.
State Boards of Animal Care	Regulate the care of animals, including licensing and regulation of animal care facilities.
State Boards of Child Welfare	Regulate the care of children, including licensing and regulation of child welfare services.
State Boards of Adult Care	Regulate the care of adults, including licensing and regulation of adult care facilities.
State Boards of Mental Health	Regulate the care of mental health, including licensing and regulation of mental health services.
State Boards of Substance Abuse	Regulate the care of substance abuse, including licensing and regulation of substance abuse services.
State Boards of Addictive Disorder	Regulate the care of addictive disorders, including licensing and regulation of addictive disorder services.
State Boards of Forensic Psychiatry	Regulate the care of forensic psychiatry, including licensing and regulation of forensic psychiatry services.
State Boards of Forensic Psychology	Regulate the care of forensic psychology, including licensing and regulation of forensic psychology services.
State Boards of Forensic Social Work	Regulate the care of forensic social work, including licensing and regulation of forensic social work services.
State Boards of Forensic Nursing	Regulate the care of forensic nursing, including licensing and regulation of forensic nursing services.
State Boards of Forensic Occupational Therapy	Regulate the care of forensic occupational therapy, including licensing and regulation of forensic occupational therapy services.
State Boards of Forensic Physical Therapy	Regulate the care of forensic physical therapy, including licensing and regulation of forensic physical therapy services.
State Boards of Forensic Speech-Language Pathology	Regulate the care of forensic speech-language pathology, including licensing and regulation of forensic speech-language pathology services.
State Boards of Forensic Audiology	Regulate the care of forensic audiology, including licensing and regulation of forensic audiology services.
State Boards of Forensic Optometry	Regulate the care of forensic optometry, including licensing and regulation of forensic optometry services.
State Boards of Forensic Podiatry	Regulate the care of forensic podiatry, including licensing and regulation of forensic podiatry services.
State Boards of Forensic Dentistry	Regulate the care of forensic dentistry, including licensing and regulation of forensic dentistry services.
State Boards of Forensic Veterinary Medicine	Regulate the care of forensic veterinary medicine, including licensing and regulation of forensic veterinary medicine services.
State Boards of Forensic Animal Care	Regulate the care of forensic animal care, including licensing and regulation of forensic animal care services.
State Boards of Forensic Child Welfare	Regulate the care of forensic child welfare, including licensing and regulation of forensic child welfare services.
State Boards of Forensic Adult Care	Regulate the care of forensic adult care, including licensing and regulation of forensic adult care services.
State Boards of Forensic Mental Health	Regulate the care of forensic mental health, including licensing and regulation of forensic mental health services.
State Boards of Forensic Substance Abuse	Regulate the care of forensic substance abuse, including licensing and regulation of forensic substance abuse services.
State Boards of Forensic Addictive Disorder	Regulate the care of forensic addictive disorders, including licensing and regulation of forensic addictive disorder services.
State Boards of Forensic Forensic Psychiatry	Regulate the care of forensic forensic psychiatry, including licensing and regulation of forensic forensic psychiatry services.
State Boards of Forensic Forensic Psychology	Regulate the care of forensic forensic psychology, including licensing and regulation of forensic forensic psychology services.
State Boards of Forensic Forensic Social Work	Regulate the care of forensic forensic social work, including licensing and regulation of forensic forensic social work services.
State Boards of Forensic Forensic Nursing	Regulate the care of forensic forensic nursing, including licensing and regulation of forensic forensic nursing services.
State Boards of Forensic Forensic Occupational Therapy	Regulate the care of forensic forensic occupational therapy, including licensing and regulation of forensic forensic occupational therapy services.
State Boards of Forensic Forensic Physical Therapy	Regulate the care of forensic forensic physical therapy, including licensing and regulation of forensic forensic physical therapy services.
State Boards of Forensic Forensic Speech-Language Pathology	Regulate the care of forensic forensic speech-language pathology, including licensing and regulation of forensic forensic speech-language pathology services.
State Boards of Forensic Forensic Audiology	Regulate the care of forensic forensic audiology, including licensing and regulation of forensic forensic audiology services.
State Boards of Forensic Forensic Optometry	Regulate the care of forensic forensic optometry, including licensing and regulation of forensic forensic optometry services.
State Boards of Forensic Forensic Podiatry	Regulate the care of forensic forensic podiatry, including licensing and regulation of forensic forensic podiatry services.
State Boards of Forensic Forensic Dentistry	Regulate the care of forensic forensic dentistry, including licensing and regulation of forensic forensic dentistry services.
State Boards of Forensic Forensic Veterinary Medicine	Regulate the care of forensic forensic veterinary medicine, including licensing and regulation of forensic forensic veterinary medicine services.
State Boards of Forensic Forensic Animal Care	Regulate the care of forensic forensic animal care, including licensing and regulation of forensic forensic animal care services.
State Boards of Forensic Forensic Child Welfare	Regulate the care of forensic forensic child welfare, including licensing and regulation of forensic forensic child welfare services.
State Boards of Forensic Forensic Adult Care	Regulate the care of forensic forensic adult care, including licensing and regulation of forensic forensic adult care services.
State Boards of Forensic Forensic Mental Health	Regulate the care of forensic forensic mental health, including licensing and regulation of forensic forensic mental health services.
State Boards of Forensic Forensic Substance Abuse	Regulate the care of forensic forensic substance abuse, including licensing and regulation of forensic forensic substance abuse services.
State Boards of Forensic Forensic Addictive Disorder	Regulate the care of forensic forensic addictive disorders, including licensing and regulation of forensic forensic addictive disorder services.

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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:

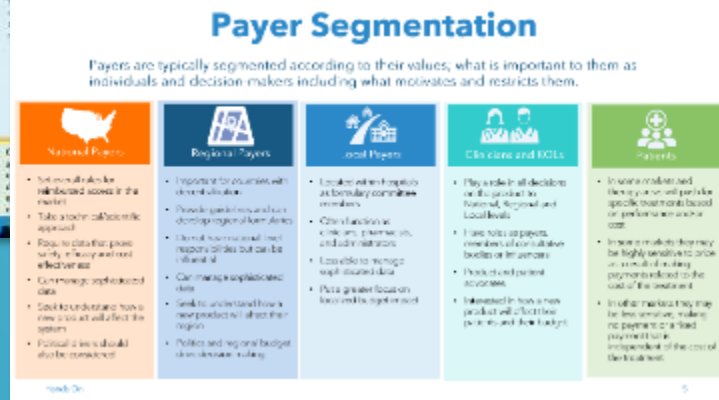


- Evolution and fundamentals of market access
- Patient considerations
- Organizational considerations
- Other ecosystem players and their considerations
- Digital considerations
- Integrated Evidence Plans (IEPs)

## 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.

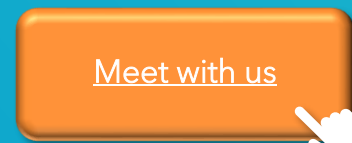
## Example Content:



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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

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

### 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 /medicinal, 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

Submit Pre-IND meeting request (MR) to appropriate FDA	FDA Response Meeting Granted Letter (includes meeting format, date, time, location)	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
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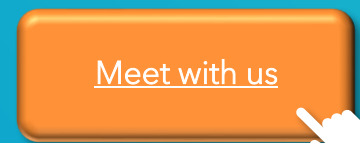
### IND Lifecycle

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# 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:

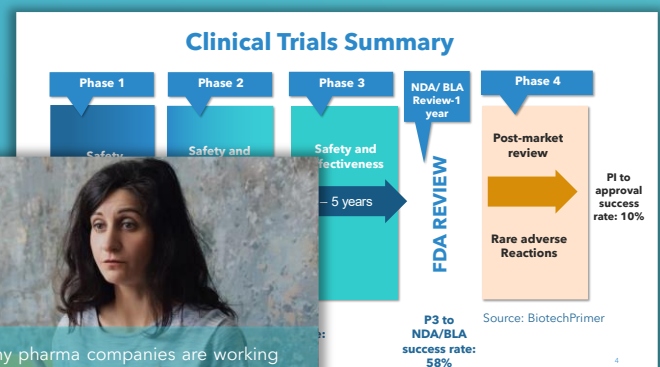
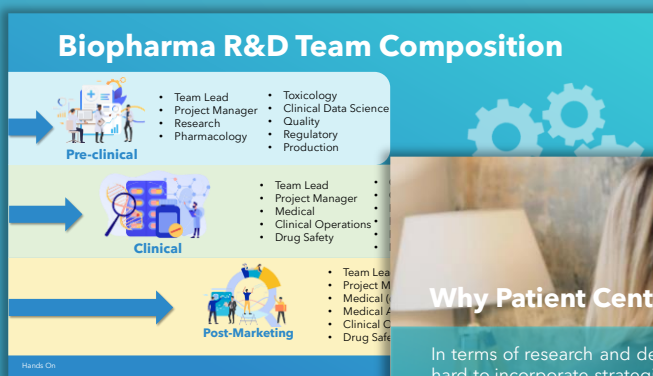


- Overview of Clinical Trial process
- Review of Phase 1 and 2 key elements
- Identification of Phase 1 and 2 critical success factors
- Challenges to Phase 1
- Phase 2 design considerations
- Phase 2 roles and responsibilities
- Best practices / lessons learned for Phase 2

## 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:



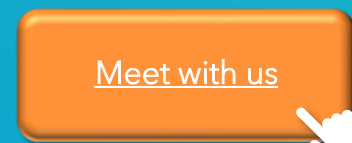
### Why Patient Centricity?

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.

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# 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:



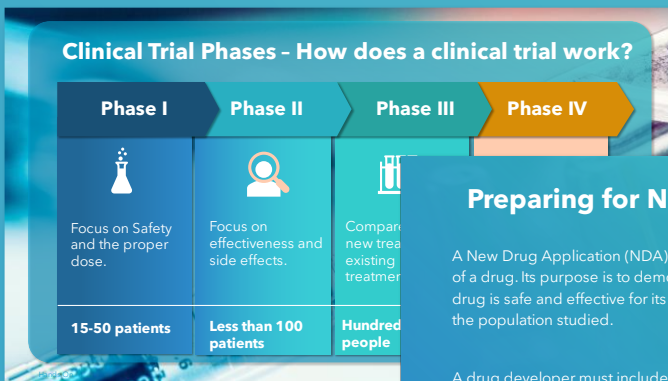
- Review of Phase 2 and 3 key elements
- Identification of Phase 2 and 3 critical success factors
- Challenges to Phase 3
- Phase 3 design considerations
- Phase 3 roles and responsibilities
- Other Phase 3 considerations



### 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).

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### Who oversees the FDA?



Hands On

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

- A consumer protection agency


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.

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### Mission of the FDA

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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

### 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					
Phase 1					
Phase 2					
Phase 3					
Number of patients			20-100	100-500	1,000- 5,000
INDs Submitted					
ONE FDA-APPROVED DRUG					
Timeline	3-6 Years		6-7 years		0.5 - 2 Years

Phase 4: PostMarketing Surveillance

### 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

Remember that advocacy development and usage are not just products; rather, they should be valued throughout the life cycle of the product and used appropriately and within the scope of their own life cycle



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# HANDS ON

Please contact us to learn how we can help your organization, leaders, and teams build their capabilities and grow their contribution to your organization's success.



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