



# HANDS ON

Learning & Organizational  
Development

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**Hands On builds stronger teams, trains  
better leaders, and delivers lasting results**

# Hands On Learning

**Learning Catalog  
2026**

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Find the right learning program for your team...

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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 Agile



## Overview

Learn advanced ways to apply Agile methodology to your business. Whatever your industry or organizational size or structure, Agile can help you and your colleagues approach work faster and more nimbly.



### Learn about:

- Understanding of Agile, its key principles, practices, and tools
- Learn from the history and evolution of Agile as a key methodology used in many industries
- Examine Agile uses in specific industries
- Learn Agile best practices and common pitfalls to avoid
- Learn emerging trends and explore other resources to leverage your understanding of Agile and how to apply in your work environment



### Key topics covered:

- Defining Agile and its Importance
- Key Principles and Practices
- Agile Across the Project Lifecycle
- Agile in Different Industries
- Key Agile Tools
- Best Practices and Common Pitfalls
- Emerging Trends



### Why this matters?

Every organization, irrespective of size or industry, can benefit from understanding faster and more effective ways to accomplish work. This is never more important when work involves cross-functional teams, as these teams carry their own complexities. Advancing knowledge of Agile and how to apply its principles and practices will benefit all organizations.

## Example Content:


**Agile Lifecycle Summary Table**

| Phase         | Primary Focus                         | Typical Outputs                                 |
|---------------|---------------------------------------|---|
| Initiation    | Vision, roles, and backlog setup      | Product vision, role assignments, initial epics |
| Planning      | Define sprint work and priorities     |   |
| Execution     | Deliver value and coordinate daily    |   |
| Review        | Present work and collect feedback     |   |
| Retrospective | Identify improvements for next sprint |   |

**Emerging Trends in Agile**

Agile is evolving to meet new needs—like hybrid work, artificial intelligence, and cross-team coordination. For example, teams use AI tools to help with connected...

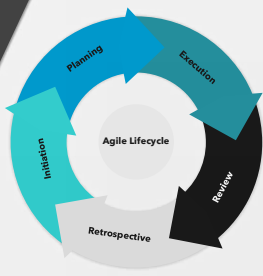
...with other...  
...ing for...  
...ure tech...  
... more



**Agile Lifecycle - Overview & Initiation**

**What is the Agile Lifecycle?**

- A structured, flexible process for planning, executing, and improving work in iterative sprints
- Supports continuous delivery, quick feedback loops, and alignment with changing priorities




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# 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:



**A business essentially has 3 buckets**



**Asset**  
What is at disposal  
(Cash, Short & Long-term securities, Office)





**10 Principles of GAAP Rules**

- Principle of **Regularity**
  - GAAP rules and regulations are satisfied.
- Principle of **Consistency**
  - Throughout the entire reporting, for all on for all deviations.
  - Company's financials.
  - comparison.

**Forecasting Areas**

| Time Frame                      | Decision Type | Examples   |
|---------------------------------|---------------|--|
| Short-term (3-6 months)         | Operating     | Inventory control, Production planning, Distribution |
| Medium-term (6 months- 2 years) | Tactical      | Leasing of plant and equipment, Employment changes   |
| Long-term (2+ years)            | Strategic     | R&D, M&A, Product changes                            |



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# Advanced Innovation Overview



## 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:



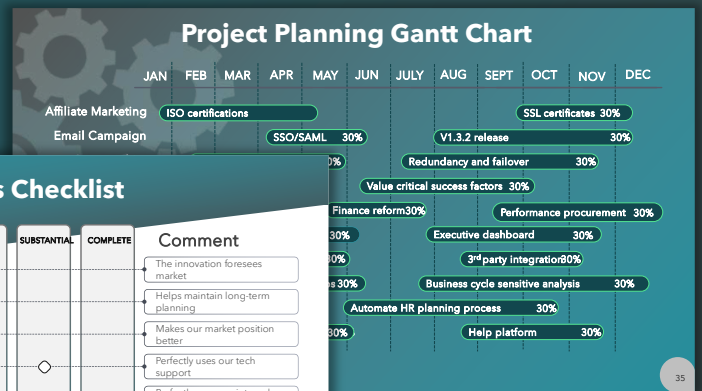
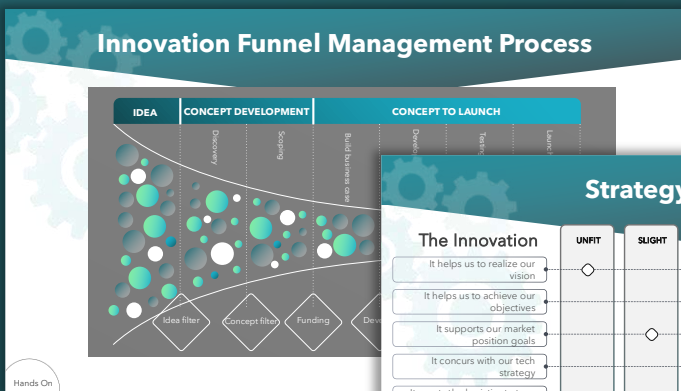
- Innovation Management overview
- Identifying innovation opportunities
- Different innovation models
- Planning and managing innovation



### Why this matters?

Innovation emphasizes the need to always think of ways to get better. The environment and competition are always evolving, innovation helps promote efficient and faster processes for new product development and development of products / services that match current market trends and company strategy.

## Example Content:



| The Innovation                        | UNFIT                    | SLIGHT                   | PARTIAL                  | SUBSTANTIAL              | COMPLETE                 | Comment                                |
|---------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| It helps us to realize our vision     | <input type="checkbox"/> |                          |                          |                          |                          | The innovation foresees market         |
| It helps us to achieve our objectives |                          |                          | <input type="checkbox"/> |                          |                          | Helps maintain long-term planning      |
| It supports our market position goals |                          | <input type="checkbox"/> |                          |                          |                          | Makes our market position better       |
| It concurs with our tech strategy     |                          |                          |                          | <input type="checkbox"/> |                          | Perfectly uses our tech support        |
| It meets the logistic strategy needs  |                          |                          |                          | <input type="checkbox"/> |                          | Perfectly uses our internal resources  |
| It provides competitive advantage     |                          |                          |                          |                          | <input type="checkbox"/> | Customers choose us rather than others |
| Builds on our core competencies       |                          |                          | <input type="checkbox"/> |                          |                          | Leverages our core strength of X       |



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# Advanced Strategic Planning



## Overview

Advance and accelerate your strategic planning capabilities by critically evaluating strategies that have been both successful and unsuccessful, while learning one of the most contemporary strategic planning models 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 over and over again.

## Example Content:

The example content includes three main slides:

- Porter's Competitive Advantage:** A diagram showing 'Markets where business competes' with 'BROAD' and 'NARROW' categories. Under 'BROAD' are 'Cost Leadership' and 'Differentiation Leadership'. Under 'NARROW' are 'Cost Focus' and 'Differentiation Focus'. A vertical axis on the left is labeled 'Source of competitive advantage' and 'DIFFERENTIATION COSTS'.
- Good vs. Bad Strategy:** A slide with a title 'Good vs. Bad Strategy' and two circular images. The left image shows a group of people in a meeting, and the right image shows a person in a white shirt. A blue arrow labeled 'Blue Ocean Shift' points from the left towards the right.
- Focus:** A slide with the title 'Focus' and the text 'Applied to strategy, 'focus' has two meanings: first, it denotes the...'. A background image shows a person looking at a whiteboard.



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# Agile & Design Thinking



## **i** 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:

**Why Agile Matters**

Agile helps teams thrive in fast-moving, complex environments by offering a flexible, human-centered way of working. Agile isn't just about speed—it's about working smarter, focusing on outcomes, and adapting quickly.

**Key benefits include: Faster Feedback Loops**

- Deliver in small increments (e.g.,

**What is Agile?**

Agile methodology is a type of project management process that was largely first used for software development.

Agile is a collection of principles that value adaptability and flexibility. It aims to provide better responsiveness to changing business needs and therefore focuses on enabling teams to deliver workable increments.

It was created as a response to inadequacies of traditional development methods such as the Waterfall method.

**Waterfall vs. Agile**

**Waterfall**  
Development is sequential from the starting point to the end point.

**Agile**  
Agile uses an incremental and iterative approach.



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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

#### Resource Allocation

- Straight method
- Allocate resources in the best way the project manager sees fit
- Review reports and adjust

#### Resource Leveling - Resource Smoothing

- Resource leveling based on resource availability
- Resource smoothing model to smooth resource usage

#### Resource Forecasting

- Process of forecasting resource requirements
- Resource forecasting to determine project scope and constraints

### RecyX

Project Start: Sun, 3/20/2022

Display Week: 1

| PROGRESS | START   | END     | Mar 21, 2022 |   |   |   |   |   |   | Mar 28, 2022 |   |   |   |   |   |   |  |  |
|----------|---------|---------|--------------|---|---|---|---|---|---|--------------|---|---|---|---|---|---|--|--|
|          |         |         | M            | T | W | T | F | S | S | M            | T | W | T | F | S | S |  |  |
|          | 3/20/22 | 3/23/22 |              |   |   |   |   |   |   |              |   |   |   |   |   |   |  |  |
|          | 3/23/22 | 3/25/22 |              |   |   |   |   |   |   |              |   |   |   |   |   |   |  |  |
|          | 3/25/22 | 3/29/22 |              |   |   |   |   |   |   |              |   |   |   |   |   |   |  |  |
|          | 3/29/22 | 4/3/22  |              |   |   |   |   |   |   |              |   |   |   |   |   |   |  |  |

### Budgeting Exercise 1

**Ruchy, a fictional pet food company**

- Produces two products ABC (400 units) and XYZ (150 units).
- The total costs of production for last year were \$ 800,000.
  - 70% variable costs and 30% fixed costs.
  - Product ABC used 75% of the variable costs and XYZ used 25%.
- Expectations:
  - Costs to go up 7% (inflation)
  - Operational efficiency levels to be similar
  - Increased production ABC = 650 units and XYZ = 400

**Determine budget for variable costs for XYZ with incremental budgeting approach.**



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# Business Process & Continuous Improvement

## Overview

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



### Learn about:

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

### Key topics covered:



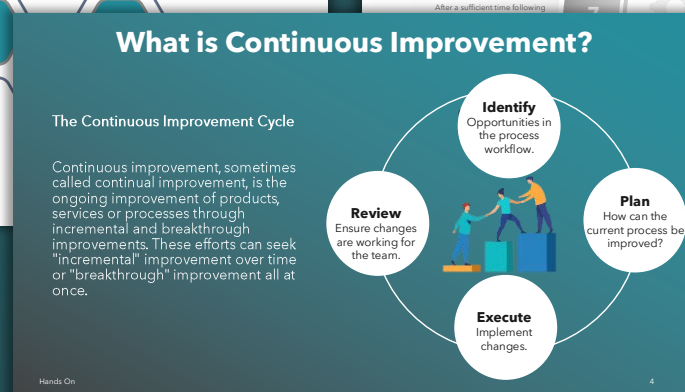
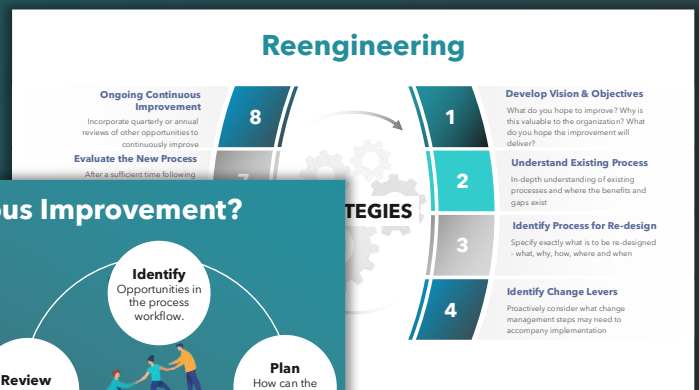
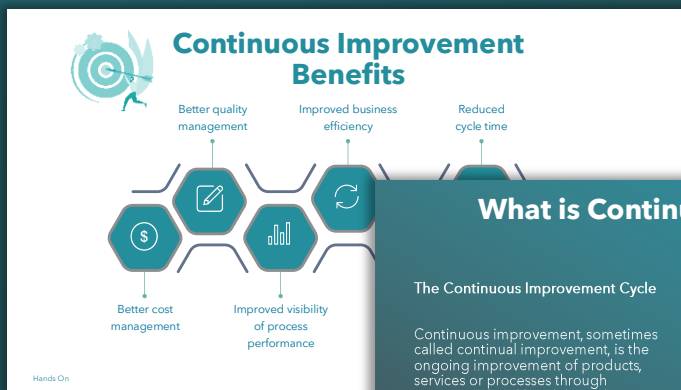
- Models for continuous improvement
- Examples of continuous improvement
- Re-Engineering steps, processes, and practices
- Planning improvement implementations
- Managing risks and change



### Why this matters?

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

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# Cross-Functional Collaboration



## Overview

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



### Learn about:

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

### Key topics covered:

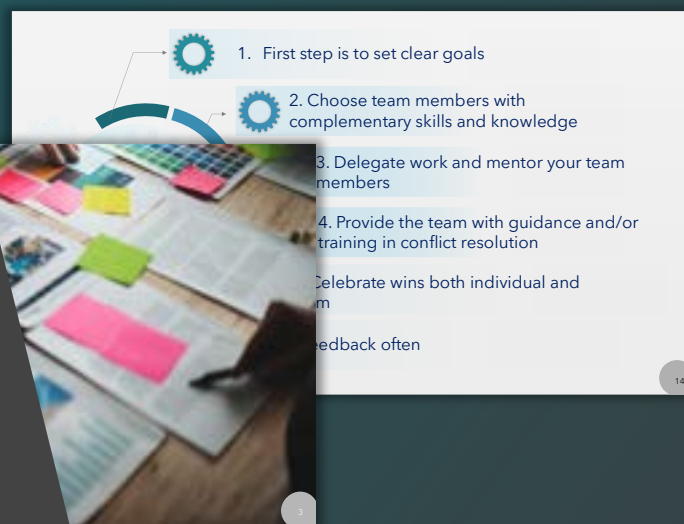
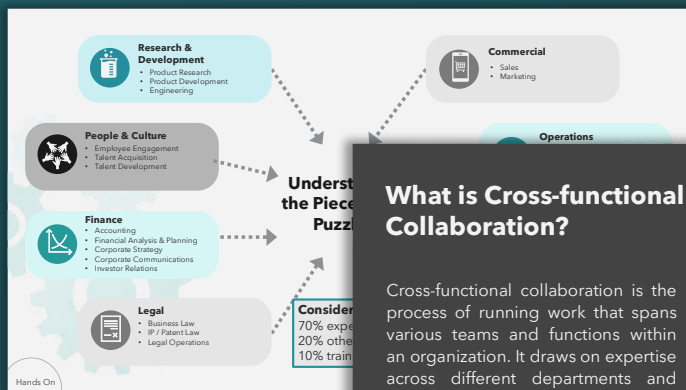


- Cross-functional Collaboration
- Adaptive Collaboration Model
- Required Skills
- Best Practices

## Why this matters?

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

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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:

**Required Mindset**

- Relationship-oriented
- Proactive
- Thought partner
- Solution-oriented
- Co-creative
- Results-oriented

**Required Skills**

**Customer Service vs. Customer Centricity**


| Customer Service   | Customer Centricity   |
|--|---|
| <ul style="list-style-type: none"> <li>• <b>Focus</b> is on resolving immediate customer issues</li> <li>• <b>Scope</b> is limited to customer interactions and transactional relationships</li> <li>• <b>Approach</b> is reactive, responding to customer problems as they arise</li> <li>• <b>Outcome</b> is customer satisfaction and issue resolution</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Focus</b> is on partnering with customers to meet their long-term goals</li> <li>• <b>Scope</b> is encompassed through the entire customer journey</li> <li>• <b>Approach</b> is proactive, anticipating challenges and proposing solutions</li> <li>• <b>Outcome</b> is building strong, loyal, and long-lasting customer relationships</li> </ul> |

**Co-Creation**

- Direct learning from customers
- Quick idea generation & testing
- Experience-based learning
- New sources of value creation
- Stakeholders (Leverage on resource diversity)
- Value Partnerships

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# Decision-Making



## Overview

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



### Learn about:

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

### Key topics covered:



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



### Why this matters?

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

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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:

- Understanding when and when not to have a meeting
- Designing meetings with clear purpose and outcomes
- Leading meetings that remain focused, inclusive and engaging
- Driving decisions, accountability, and follow-through
- Enhancing effectiveness in virtual and hybrid meetings

### Key topics covered:



- Choosing the Right Meeting Format
- Planning for Effective Meetings: Before, During & After
- Leading Productive Meetings
- Effective Virtual and Hybrid Meetings



### 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:

### Meetings Are Important

"Meetings are at the heart of an effective organization, and each meeting is an opportunity to clarify issues, set new directions, sharpen focus, create alignment, and move objectives forward."

-Paul Axtell, Author of Meetings Matter

### Meeting Purpose

Decide - Align - Create

- Different meetings exist for different purposes
- Most meeting frustration comes from unclear purpose
- Trying to decide + align + brainstorm in one meeting creates chaos

### The Cost of Ineffective Meetings

**Decide**  
Make a clear decision or approval

**Align**  
Build shared understanding or commitment

**Create**  
Generate ideas or solutions

### Time cost is only the visible cost

**Hidden costs include:**

- Decision delays
- Burnout
- Disengagement
- Cognitive switching and loss of focus
- Energy drain
- Rework and follow-up meetings



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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:

### The Accounting Equation

|        |   |             |   |         |
|--------|---|-------------|---|---------|
| Assets | = | Liabilities | + | Capital |
| Assets | = | Liabilities | + | Capital |
| Assets | = | Liabilities | + | Capital |

Hands On

### Capital vs. Revenue Expenses

Capital expenditures are for fixed assets, which are expected to be productive assets for a long period of time. They are depreciated over their life.

Revenue expenditures are for costs that are related to specific revenue transactions or operating periods, such as the cost of goods sold or repairs and maintenance expense.

Hands On

### Accruals Exercise

What is the rent expense that should be recorded for 2020?  
What does Sarah owe in rent at 31 Dec 2020?

- At 31 Dec 2019, Sarah owes \$450 rent for 2019
- 23 March 2020: Sarah receives a rent bill for 1 Jan - 28 Feb 2020 for \$4,500
- 2020: Sarah pays \$4,500
- 1 June 2020: Sarah receives a rent bill for 1 Mar - 30 May 2020 for \$3,000
- 2020: Sarah pays \$3,000
- 2020: Sarah received a rent bill for 1 June - 31 Aug 2020 for \$4,500
- 2020: Sarah pays \$4,500
- 1 Nov 2020: Sarah receives a rent bill for 1 Sep - 30 Nov 2020 for \$4,500



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# Ideation & Innovation



## **i** Overview

Learn about the difference, yet connected nature, 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 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:

**Innovation is Flexible ...**

**Foundational Types of Innovation ...**

- Incremental Innovation
- Disruptive Innovation
- Service Innovation

**Pick your Ideation Technique(s)**

**Ideation**

- Flip the Problem
- Random Words
- Worst Possible Idea
- Empathy Mapping
- Method 6-3-5
- Crazy 8's
- How would Google do it?



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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:

### Business Imperative

Why Effective Interviewing Matters

- Bad hires cost an avg. of 30% of their 1<sup>st</sup> year earnings  
Source: U.S. Department of Labor
- Hiring top performers vs. average performers yields 67% productivity differential  
Source: McKinsey & Company

### Interviewer Expectations

Quality, Key Standards and Milestones

- Prepare your interview questions in advance and always be on time for interviews

### Examples of Questions to Avoid

- Are you a citizen of this country?
- Are you single or married?
- Do you have children? How old are your kids?
- How many days were you sick last year?
- Are you pregnant? When are you due?
- In what country were you born?
- Do you live alone?
- What does your spouse do?
- I love that accent. Where are you from?
- Who are you voting for?
- Have you ever filed a worker's compensation claim?
- I noticed you're limping. What happened?
- Have you ever been arrested?
- What year did you graduate from school/college?

### Key Standards / Milestones

- Google research has shown that 4-5 interviews is optimal, and there is no more predictive validity from longer interview panels. Carefully consider the rationale for every additional interview
- Hiring Managers provide feedback from Candidate Screening within 2 business days
- Interview Panel members provide insightful and actionable candidate feedback within 3 business days
- Hiring Managers make go or no-go hiring decisions within 1 business days



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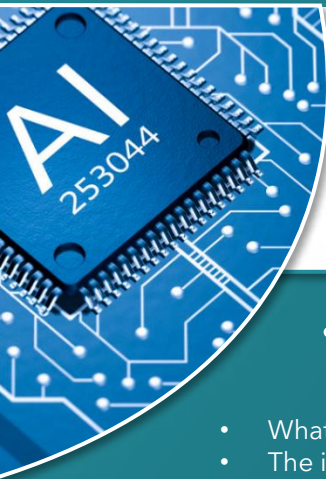


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# Intro to AI



## **i** 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
- The next trends / evolutions in 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:

A collage of three presentation slides. The left slide is titled 'What is AI' and lists two bullet points about AI's capabilities. The middle slide is titled 'Different Types of AI' and lists four types: Reactive machines, Limited memory machines, Theory of mind machines, and Self-aware machines. The right slide is titled 'How does Virtual Reality' and discusses VR's role in AI model development.



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# Intro to Generative AI (AI 201)



## **i** 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 (GAI) 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

**Generative AI Modalities**

A generative AI system is constructed by applying unsupervised machine learning (invoking for instance neural network architectures such as GANs, VAE, Transformer, ...) or self.

**When using Generative AI**

**Comparisons: Generative AI vs. Agentic AI vs. AI Agents**

| Generative AI   | Agentic AI   | AI Agents   |
|---|--|---|
| Generative AI generates new content such as text, images, and music based on training data. | Agentic AI performs tasks autonomously and can pursue goals by interacting with its environment. | AI agents combine generative and agentic capabilities to accomplish complex objectives. |

**Generative AI Modalities**

- Text
- Code
- Images
- Audio
- Video
- Music
- Actions
- 3D Modeling



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# Leading Change



## **i** 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.

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# Leading Projects



## **i** 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.

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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:

**7 P's MARKETING MIX**

- 01 PLACE**
  - Retail
  - Wholesale
  - Mail Order
  - Internet
  - Direct Sales
- 02 PRICE**
  - Skimming
  - Penetration
  - Psychological
  - Cost-Plus
  - Loss Leader
- 03 PROMOTION**
  - Special Offers
  - Advertising
  - Endorsement
  - User Trials
  - Leaflets/Posters

**04 PRODUCT**

- Design
- Technology
- Usability
- Convenience
- Warranties

**05 PEOPLE**

- Customers
- Promotional and Supply

**8P's MARKETING MIX**

- PERFORMANCE**  
How well the service competes in the marketplace, including measuring the company's financial goals
- PRODUCT**  
Includes design, packaging, usability, quality, features, colors and size options
- PRICE**  
Depends on packing, discounts, timing, location, shipping and other offer elements
- PLACE**  
Includes retail, wholesale, internet, phone and other multi-channel options
- PROMOTION**  
Advertising, communications, messaging and content to persuade the customers to buy

**MARKETING MIX - 4P's VS. 7P's**

**4P's (Classic Consumer Goods Marketing):** Product, Price, Place, Promotion

**7P's (Expanded Service Marketing):** Performance, Process, Product, Price, Place, Promotion, People



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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

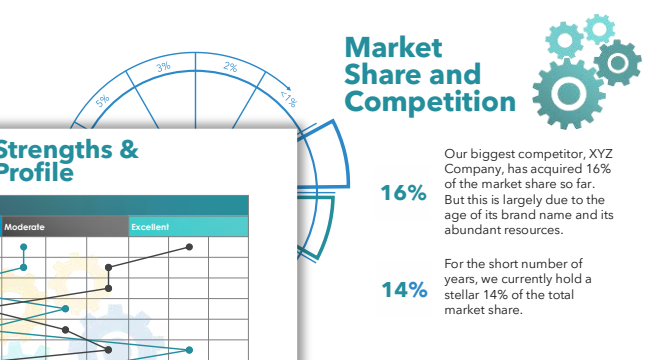
**Economic State**

- 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

### Market Share and Competition



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.


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

### Market Analysis - Strengths & Weaknesses Profile

| Critical Resources (performance potential) | Evaluation   |          |           |
|--|--------------|----------|-----------|
|  | Insufficient | Moderate | Excellent |
| Product line X                             |              |          |           |
| Sales market (market share)                |              |          |           |
| Marketing concept                          |              |          |           |
| Finance situation                          |              |          |           |
| Research & Development                     |              |          |           |
| Production                                 |              |          |           |
| Accommodation of raw materials and energy  |              |          |           |
| Location                                   |              |          |           |
| Cost situation, differentiation            |              |          |           |
| Quality of management                      |              |          |           |
| Leading systems                            |              |          |           |
| Potential increase of productivity         |              |          |           |

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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 can 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:

**Main Objectives**

It is necessary to define the objectives for it involves all that we wish to achieve through our marketing efforts and what our brand wants to communicate to the target audience.

**Internal Analysis**

Inform our target customers what product they should expect and its immediate benefits – with clear verbiage.

At \$2.35 per unit, our production cost has been successfully reduced by 30%.

**Interactive Marketing Model**

**Noise**  
Image Conflict, and Consistency

**Channel**  
Newspaper, Mail, Magazine, E-mail, TV, Radio, Package, Salesperson, Customer Service, Internet

**Receiver**  
Target Audience

Feedback

Cost

| Month | Cost | Revenue | Market Value |
|-------|------|---------|--------------|
| Jan   | 15   | 10      | 10           |
| Feb   | 10   | 15      | 15           |
| Mar   | 12   | 12      | 12           |
| Apr   | 8    | 18      | 18           |
| May   | 10   | 15      | 15           |
| Jun   | 12   | 12      | 12           |
| Jul   | 10   | 15      | 15           |
| Aug   | 15   | 10      | 10           |
| Sep   | 18   | 12      | 12           |
| Oct   | 20   | 10      | 10           |
| Nov   | 15   | 15      | 15           |
| Dec   | 10   | 20      | 20           |



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# Personal Time Mastery



## **i** 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

Hands On

### Listening to our Language

| Reactive Language           | Proactive Language  |
|-----------------------------|---|
| • There's nothing I can do. | <ul style="list-style-type: none"> <li>• Let's look at our alternatives.</li> <li>• I can choose a different approach.</li> <li>• I control my own feelings.</li> <li>• I can create an effective presentation.</li> <li>• I will choose an appropriate response.</li> <li>• I choose.</li> <li>• I prefer.</li> <li>• I will.</li> </ul> |

### 7 Habits of Highly Effective People

1. Be Proactive
2. Begin With the End in Mind
3. Put First things First
4. Think Win/Win
5. Synergize
6. Seek First to Understand, Then be Understood
7. Sharpen the Saw

Adapted from Stephen Covey's 7 Habits of Highly Effective People



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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.

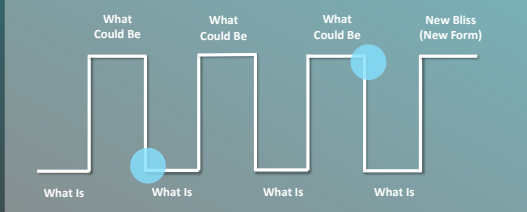
## Example Content:

### Audience Feedback

- Was the subject of the presentation clear?
- How did you feel connected to the subject of the presentation?
- What do you remember most / what stood out to you the most?
- Did you understand your call to action?
- Are you committed to taking that call to action?
- What other feedback do you have?

Hands On

### Power of Stories in Presentations




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Hands On

### PowerPoint Presentations

- Focus on one or two ideas per slide
- Use two of three fonts
- Pay attention to visual hierarchy
- Keep text per slide to a minimum
- Minimize use of bullet points

can  
ver you can  
consistent




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# Portfolio Management



## **i** 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:



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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:

### PLM Fundamentals

Understanding product life cycle management can help your business tighten its marketing focus with improved efficiency. Here's a look at the product life cycle stages and how to use them to make better management decisions.

**What is the product life cycle theory?**

The product life cycle theory maintains that all products naturally go through four stages of market progression:

- Introduction
- Growth
- Maturity
- Decline

### Product Lifecycle Management (PLM)

PLM refers to the handling of a good as it moves through the typical stages of its product life: development and introduction, growth, maturity/stability, and decline. This handling involves the development and manufacturing of the good and the marketing of it.


### Stages in Product Lifecycle Management


| INTRODUCTION                    | GROWTH  | MATURITY  | DECLINE |
|---------------------------------|---|---|---------|
| Product extension, or, warranty | Diversify brand and models                    | Phase out weak items                                  |         |
| Match the price                 | Price to match or be aligned with competitors | Cut price   |         |
| Intensive                       | Intensive                                     | Selective   |         |
| Stress and interest mass market | Stress brand difference and benefits          | Reduce to level needed to retain more loyal customers |         |
| Take advantage of surmer demand | Increase to encourage brand switching         | Reduce to minimal level                               |         |

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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:

**What is Risk Management?**

Risk management is the identification, evaluation, and prioritization of risks followed by coordinated and economical application of resources to minimize, monitor, and control the probability or impact of unfortunate events or to maximize the realization of opportunities.

**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

**External Risks**

- Socio-Political
- Economical Environment



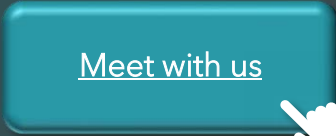
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# Root Cause Analysis & RCA Mapping

## 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:

**RCA Analysis Example**

**Root Cause**

**Steps of Root Cause Analysis**

**Root Cause Analysis Methods**



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# Setting Goals & Expectations



## **i** 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 practice 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:

**The 5 Principles of Successful Goal Setting**

- 1** Commitment  
Attachment to goal
- 2** Clarity  
Specificity of goal
- 3** Challenge  
Degree of goal difficulty
- 4**
- 5**

Source: Lock & ...

**Communicating & Cascading Goals**

- Provides clear direction
- Clarifies what the organization is focused on

...d how we ...  
...their work ...  
...bals

**Tips for Setting Expectations**

- 1** Set expectations early and often
- 2** Keep expectations attainable and realistic
- 3** Make expectations that follow the SMART goal framework
- 4** Connect expectations to clear metrics
- 5** Review employee performance regularly
- 6** Be open to collaborating on expectations



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# Scaling the Organization



## Overview

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



### Learn about:

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



### Key topics covered:

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



### Why this matters?

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

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# Strategic Planning

## Overview

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



### Learn about:

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

### Key topics covered:



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

## Why this matters?

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

## Example Content:

**Zoom Out on Strategy**  
Porter's Five Forces Analysis

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

**Supplier Power**

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

**Threat of Substitution**

- Substitute performance
- Cost of change

**Strategic Roadmap**

**MISSION**  
Support the needs of the vulnerable population

**VISION**  
A future where all have equality of opportunity and a good standard of living

**COMPETITIVE ADVANTAGE**  
Faster access to funding and increased access to governmental resources

**AIM01**  
Provide services to vulnerable people

- Objective 1.1: Provide food, shelter and support service to vulnerable people.
- Objective 1.2: Carry out early intervention for at-risk individuals.

**AIM02**  
Advocate for the needs of vulnerable people

- Objective 2.1: Advocate to government through policy submissions.
- Objective 2.2: Advocate to broader society through media campaigns.

**AIM03**  
Raise money to support vulnerable people

- Objective 3.1: Attract government investment.
- Objective 3.2: Attract investment from private and philanthropic sources.

**Zoom In on Strategy**


**THE MCKINSEY 7S MODEL**

The McKinsey 7S Framework is a management model developed by business consultants Robert H. Waterman, Jr. and Tom Peters in the 1980s. This was a strategic vision for groups to include businesses, business units and teams.

| HARD ELEMENTS  | SOFT ELEMENTS   |
|--|---|
| <ul style="list-style-type: none"> <li>Strategy</li> <li>Structure</li> <li>Systems</li> </ul> | <ul style="list-style-type: none"> <li>Shared Values</li> <li>Skills</li> <li>Style</li> <li>Staff</li> </ul> |

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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.

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# Working in Hybrid Teams



## **i** 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.

| Team Type                | Benefits   | Challenges   |
|--------------------------|--|--|
| <b>Traditional teams</b> | <ul style="list-style-type: none"> <li>Easier and faster to get to know each other</li> <li>Easy to just "pop-by" for a quick face-to-face chat</li> <li>Easier to get together for a team meeting</li> <li>Gives people an opportunity to get out of their homes and interact face-to-face</li> </ul>   | <ul style="list-style-type: none"> <li>Dealing with distractions that come from being together</li> <li>Loosing productive time commuting to and from the office</li> <li>Conflicts may more easily and quickly arise due to being together all the time</li> <li>Is typically more expensive for your company to maintain</li> </ul>  |
| <b>Hybrid teams</b>      | <ul style="list-style-type: none"> <li>Close to everyone, if not all team members are in the same situation (working remotely)</li> <li>Costs for relocation, travel and office space are greatly minimized</li> <li>Relocation and commute stress are eliminated</li> <li>Time wasted on commuting is now reallocated toward work</li> <li>Work-life balance may increase through greater personal flexibility</li> <li>Allows your company to recruit talent wherever they may reside</li> <li>Provides flexible working conditions for those who need or want it</li> <li>Keeps communication and discipline in communicating and collaborating with an mix of co-located and remote team members</li> <li>May be more cost-effective for the company, such as reducing costs of relocation or office space and other office amenities</li> </ul> | <ul style="list-style-type: none"> <li>We have to find creative and highly disciplined ways to get to know one another, communicate and collaborate</li> <li>Depending on where team members reside, managing to different time zones may be an issue</li> <li>Typically takes longer to get to know one another</li> <li>If standards, disciplines and rewards for communicating and collaborating do not exist or are not strong enough, work quality, engagement and satisfaction may suffer</li> <li>Requires advance planning to ensure all team members feel an equal sense of belonging</li> <li>We have to watch-out for potential scenarios of favoritism to those in-person team members vs. those who are remote</li> <li>We have to find creative and highly disciplined ways to get to know one another, communicate and collaborate</li> <li>Depending on where team members reside, managing to different time zones may be an issue</li> </ul> |

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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



## **i** 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

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.



### Why this matters?

## Example Content:



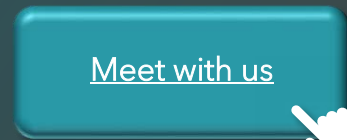
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# Effective Communication



## 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:



### Prepare Your Communication

- Your Objective**  
What do you hope to achieve? Why is this important?
- Your Audience**  
What do you know and \*not\* know about your audience? What does your audience need from this interaction?
- Your Understanding**  
How will you increase your understanding of  
a) your audience and  
b) the situation?
- Your Message**  
What is the key message you want to convey? Are you willing to change course if you discover something new?
- Your Approach**  
What is the best platform and setting in which to hold this conversation?

### Key

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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:

### When Feedback Isn't Shared: The Cost of Silence

**Research Shows:**

- Employees who receive regular, meaningful feedback are significantly more engaged than those who don't.
- Teams that openly discuss performance outperform those that avoid difficult conversations.
- Employees are more likely to leave managers who avoid feedback than those who deliver it clearly and constructively.

### Effective vs. Ineffective Feedback

| Effective Feedback  | Ineffective Feedback  |
|---|---|
| <ul style="list-style-type: none"> <li>✓ Recognizes and rewards (not just for improvement)</li> <li>✓ Given frequently and timeously</li> <li>✓ Assumes positive intent</li> <li>✓ Honest w/ no sugar-coating</li> <li>✓ Fair w/ no extremes or embellishments</li> <li>✓ Balanced w/ good and areas for improvement</li> <li>✓ Specific w/ examples</li> <li>✓ Respectful</li> <li>✓ Action-oriented (where applicable, there's an agreed plan to action the feedback)</li> <li>✓ Sender and receiver own their roles</li> </ul> | <ul style="list-style-type: none"> <li>✗ Given infrequently and outdated</li> <li>✗ Doesn't take into consideration one's intent (vs. action)</li> <li>✗ Sugar-coats to lighten the landing, but therefore unclear</li> <li>✗ Blows the incident out-of-proportion</li> <li>✗ Sweeping w/out specific examples</li> <li>✗ Focuses only on improvement (not recognizing and rewarding effort and accomplishments)</li> <li>✗ No clear action following feedback</li> <li>✗ Sender and/or receiver don't recognize their roles</li> </ul> |

### What Happens in the Brain

- Amygdala activates (threat detection)
- Prefrontal cortex (reasoning)
- Hypothalamus (emotions)
- Hypothalamus (hormones)
- Hypothalamus (stress response)



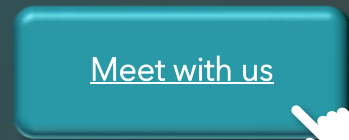
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# Presenting Technical Information



## 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:

### Strategic Imperatives

- Change the Dogma: Increase awareness of IgAN as a chronic, progressive B-cell-mediated autoimmune kidney disease that requires early diagnosis and intervention to reduce the lifetime risk of ESKD.
- Differentiate: Position B-cell modulators as disease-modifying therapies with the potential to preserve kidney function in IgAN. Emphasize what differentiates atacept within the B-cell modulator class.
- Ensure broad access/reduce implementation friction. Ensure timely initiation of effective therapy. Facilitate immediate adoption and minimize barriers.

### Structure for Presenting Technical Information



- Generally, understand your information (shared direction)
- Align with your work (they may have to do something with this)
- Support your work (they somehow influence the adoption of your work)
- Convey your work to others



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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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# 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:

**Diversity** is a fact.  
**Equity** is a commitment.  
**Inclusion** is a behavior.  
**Belonging** is a feeling.

**Why DEIB is so Important**

- It's the right thing to focus on, as we all benefit from a more diverse, equitable and inclusive work environment.
- Organizations with more diverse thinking styles, report 66% more innovation by comparison to others.
- Organizations that report high levels of inclusive leadership are 45% more likely to report market share growth.
- Organizations with greater diversity and equity in leadership report 2 x greater company valuation.
- Organizations with higher diversity and inclusive leadership and consistently equitable practices report 2 x higher employee engagement.

Source: 2021 Deloitte Study on bottom line impact of DEIB


**Diversity is Multidimensional**

**3 key dimensions**

- Organizational dimensions** - where we each are in our organizations today.
- External dimensions** - where we are in our personal lives today.
- Internal dimensions** - who we have likely been all along.

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# Increasing Civility in the Workplace



## 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:

**Benefits and Impact**  
The Bottom line Impact of Civility...

**Addressing Incivility**  
If you decide to confront someone on their incivility, it's best to not react in the moment, take a pause, and plan for how you will address this matter. Here's some key tips for doing this:  
**Steps to Address Incivility**  
Ask the individual for some private, scheduled time to discuss the matter. Don't try to do this in a public setting, or without planning for the conversation  
Focus on the issue, not the individual  
State specifically what bothered you and how it made you feel. You can start the conversation by stating that you recognize that the behavior was unintentional. This will put the other person at ease somewhat to better listen to what you have to say

**Personal Behaviors and Actions**

- Smile often
- Act authentically and humbly
- Listen actively when others are speaking
- Seek others' opinions
- Involve others in decisions when their input is important
- Operate with a giving mindset (such as sharing information and resources, recognizing the contributions of others, expressing gratitude)
- Operate with a total team mindset (we're only successful if we work well together)



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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:

**How Does Bias Affect Our Thinking?**

- **Our Perception** - how we see people and perceive reality.
- **Our Attitude** - how we react towards certain people.
- **Our Behavior** - how we act towards others.
- **Our Actions** - how we interact with others.
- **Our Language** - how we communicate.
- **Our Mindset** - how we think about ourselves and others.

**Common Mistakes Made in the Workplace**

-  Hiring the wrong candidate for a job
-  Misunderstanding your customers
-  Under-valuing employees and not getting the most out of them
-  Causing talented employees to get frustrated and leave
-  Promoting unsuitable employees beyond their capabilities

And much more...

**Neurological Pathways to Unconscious**

Conscious bias → Overt behavior

Unconscious bias → Inadvertent behavior

# 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:

**Different Styles for Handling Conflict**

COLLABORATING

Avoiding

Accommodating

**Styles & Preferences**

Results, Bottom-Line, Drivers

Emotions, Enthusiasm, Expressive, Relationship-Driven

Thinking, Data, Narrow & Deep, Micro-detail

**Different Conflict Styles**


Comprising = yield/yield "split the difference"

Avoiding = lose/leave "leave well enough alone"

Collaborating = win/win leads are better than one

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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.

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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:

### What is Executive Presence?

At its heart, executive presence is about how you show up; about how you are perceived by others – your ability to inspire confidence, how you connect with people and exert your influence.

And the good news is that anyone can develop executive presence through a set of behaviors.

Hands On

### Limiting Beliefs

Thinking back to when you last experienced a limiting belief, try that here:

**REASON**

I do not have the engineering experience

Or

**EXCUSE**

They probably want a more senior person

**Take action** to gain the experience for another time.

How do you know they want a more senior person? If you believe you can do it, volunteer.

Hands On

### Know Yourself

Given that our own “brand” matters so much, it is important to know what it is. Try to articulate it here by answering the following:

How would I describe me?


Writing down how you see yourself at work helps to capture the accuracy or differences perceived by others.

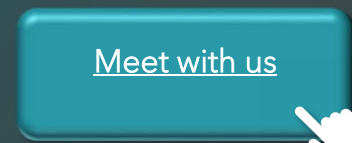
Continue on to what you can do to move the two closer together. If you have had a recent promotion, dig it out and take another look.

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# Influencing & Stakeholder Management



## **i** 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:

**Engagement & Management Are Both Required**

Relationships & Influence  
Stakeholder Engagement

Requirements  
Planning  
Execution  
Delivers  
Value

### Practicing Style Adaptation

Revisit your earlier work on stakeholder analysis

Use DiSC to consider each stakeholder’s style and preferences

Identify a few things you can do to better adapt your approach to each stakeholder based on their likely style and preferences

**Prioritize Your Stakeholders**

Stakeholder Mapping

|  |  |
|--|--|
| <b>High Interest + Low Influence</b> <ul style="list-style-type: none"> <li>• Inform Completely</li> <li>• Monitor closely</li> </ul>          | <b>High Interest + High Influence</b> <ul style="list-style-type: none"> <li>• Regularly engage</li> <li>• Anticipate needs</li> <li>• Keep satisfied</li> </ul> |
| <b>Low Interest + Low Influence</b> <ul style="list-style-type: none"> <li>• Share essential information</li> <li>• Minimal contact</li> </ul> | <b>Low Interest + High Influence</b> <ul style="list-style-type: none"> <li>• Monitor regularly</li> <li>• Anticipate needs</li> <li>• Keep satisfied</li> </ul> |

Stakeholder Influence



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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 lead to better overall outcomes.



### 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 each 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:

**Conversations that missed the mark**

Thinking about the crucial conversation you identified that **did not** go well:

For example:

- You felt misunderstood
- The other person shut down or pushed back
- You left frustrated, annoyed, or replaying it later

Hands On

**Tips for Navigating Difficult Conversations**

- ✓ Lead with facts and don't make assumptions
- ✓ Demonstrate care and connection
- ✓ Address the problem as soon as you can
- ✓ Always keep your cool. Pause if you feel yourself reacting
- ✓ Focus on behaviors, not personalities
- ✓ Prepare and rehearse your opening and questions
- ✓ Assume positive intent
- ✓ Remain curious not convincing

Hands On

**Business Impact of Effective Conversations**

- Builds a high-performance culture

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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 agreement
  - Cultivates trust and safety
  - Maintains presence
- 3 Communicating effectively:**
  - Listens actively
  - Evokes awareness
- 4 Cultivating learning and growth:**
  - Facilitates growth

Hands On

### Coaching for Performance vs. Coaching for Development

Coaching for performance is about addressing and fixing a specific problem or challenge.

It's everyday "stuff," and it's important and necessary.

Hands On

### From GROW to COACH

Coaching for development is about turning the focus from the issues to the person dealing with the issue.

This conversation is more rare and significantly more powerful.

A Assess & Prepare   C Converse   H How to Progress

Hands On



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# Being a Leader



## Overview

This program is great for all colleagues, even if you do not currently have direct reports. You may still act as leaders providing direction and oversight to your team. You will learn steps to align and inspire your team, helping the business achieve its vision while helping people realize their full potential.



### 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:

**Key Actions You Can Take**

- 1 Decide how you want to be known as a leader
- 2 Understand challenges and remove barriers
- 3 Clarify direction and priorities
- 4 Set expectations and norms by giving feedback
- 5 Coach your team members for growth and development
- 6 Remove roadblocks and create access for your team
- 7 Build trust with your team
- 8 Embrace and leverage diversity and be inclusive

**Decide How You Want to be Known as a Leader**

-  What qualities or behaviors do you want to be known for?
-  What do you not want to be known for?
-  What do you want your team or others to say about you when you're not around?

**Trust**

- Cares about me and my concerns
- Values our relationship
- Keeps confidences

**Ability**


- Competent
- Technically skilled
- Knowledgeable
- Successful track

**Integrity**

- Sound principles
- Honest
- Balances viewpoints
- Reliable

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# Being an Inclusive Leader



## **i** 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.

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# Being a Resilient Leader



## Overview

In this program, you'll learn the skills and practices of resilient leaders. Resilient leaders lead



### Learn about:

- People Leader Roles through times of Change
- How Leaders Navigate through Change
- Leading Your Team through Change
- Increasing Yours and Your Team's Resiliency

### Key topics covered:



- Revisit expectations of people leaders
- Understand emotions and reactions to change
- Learn how to best navigate change and help your team do the same
- Learn how to increase yours and your team's resiliency

## Why this matters?

For leaders and employees, resiliency continues to be rated among the most important skills for effective personal, team, and organizational management. Learning how to increase your own resiliency as a leader, while advancing your ability to increase your team's resiliency, are critical to leader and organizational success, particularly in the realms of navigating through change.

## Example Content:

**Stages of Change**  
To increase our resiliency, it's important to understand how we respond to change. Our response to change will vary given the change itself and our personal views on how the change may impact us or others.


**Understanding How We React to Change**  
7 Stages of Emotion: Premonition, anxiety; Shock, fear; Defense, anger; Integration, self-confidence.

**What Builds Resiliency?**  
The 6 Domains of Resilience:  
- **Collaboration**: Persistence, Support networks, Social context, Manage perceptions  
- **Tenacity**: Persistence, Realistic optimism, Bounce back  
- **Health**: Nutrition, Sleep, Exercise  
- **Vision**: Purpose, goals and congruence  
- **Composure**: Regulate emotions, Interpretation bias, Calm and in control  
- **Reasoning**: Problem-solving, Resourcefulness, Anticipate and plan

**A Simple Way to Think About Resiliency**  
A spectrum from ADVANCING to ADVERSITY, with stages: DESPITE, Practice, and proactive. Includes the text: 'wait for adversity' and 'use both large and small everyday challenges'.

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# Creating Culture as a Leader



## **i** 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:

**“Company culture is how you do what you do in the workplace. It’s the sum of your formal and informal systems, behaviors, and values; all of which create an experience for your employees and customers.”**

**- Great Place to Work**

**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       |   |                                 |
| Values                      | Cross Functional Coordination + Integration | Agreement                       |
| EVERYONE IS INVOLVED        |   |                                 |
| Government                  | Team Orientation                            | Focus on Capability Development |

**What is company culture and why is it important?**

Barriers to growth (Percentage of respondents)

| Barrier                       | Percentage |
|-------------------------------|------------|
| Insufficient resources        | 45%        |
| Inability to focus            | 34%        |
| Culture (e.g., risk aversion) | 34%        |
| Organizational complexity     | 26%        |
| Weak business plans           | 24%        |
| Missing capabilities          | 23%        |
| No attractive opportunities   | 15%        |

Just one in nine start up companies achieve sustained, profitable growth over 10 years. And 85% of executives blame that shortfall on internal factors with a poor or toxic culture one of the top 3 factors. (Source: Bain and Co - The Founder Mentality)



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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 teams 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:

**Manager vs Leadership Actions**

| Leadership Actions  | Management Actions  |
|---|---|
| <ul style="list-style-type: none"> <li>• Innovates and defines new ways of working</li> <li>• Defines and provides original solutions</li> <li>• Places emphasis on an elevating purpose of the organization and people's role within this</li> <li>• Typically focuses on longer-term opportunities and problems</li> <li>• Asks questions like "why?" Or "what?"</li> <li>• Continually reviews the horizon</li> <li>• Prefers to challenge the status quo</li> </ul> | <ul style="list-style-type: none"> <li>• Administers and oversees current ways of working</li> <li>• Leads to</li> <li>• Plans or</li> <li>• Typi</li> <li>• As</li> <li>• C</li> <li>• St</li> </ul> |

**Aligning Your Team**


1. Align your vision to the organization
2. Ensure your team understands the organization's vision and their roles within this
3. Co-create your team's vision with your team
4. Develop goals and work plans that enable the vision
5. Talk frequently about the team's vision
6. Share success stories as soon as these occur
7. Reward your team for executing to the vision

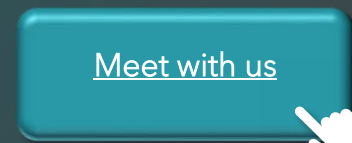
**3**

By co-creating together, we garner a true sense of shared purpose and direction and solidify the commitment and engagement that is required of each individual.

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# Coaching Others



## **i** 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.

**From GROW to COACH**

|                       |                  |                           |                   |                          |
|-----------------------|------------------|---------------------------|-------------------|--------------------------|
| <b>C</b> Capabilities | <b>O</b> Observe | <b>A</b> Assess & Prepare | <b>C</b> Converse | <b>H</b> How to Progress |
|-----------------------|------------------|---------------------------|-------------------|--------------------------|



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# Communicating as a Leader



## Overview

Learn how to advance your communication skills as a leader of others. Communication underpins all that we do in organizations, and the need for more effective communications from leaders is never more prevalent in work environments today, where things change and evolve rapidly.



### Learn about:

- The Leader's Role in Communications
- Establishing a Cadence and Channels for Communications
- Optimizing your Communications

### Key topics covered:



- Understand where, when and how you need to communicate as a people leader
- Learn best practice tips and techniques for communicating as a leader

## Why this matters?

Much of how leaders lead teams in organizations is predicated on how effectively they communicate with their teams, partners, and stakeholders. It's not just how they communicate, but when, what, and why. Helping leaders optimize their communication skills ultimately helps them, their teams, and their organization overall operate at optimal levels with optimal engagement.

## Example Content:

### Communicating as a People Leader

| WHAT   | WHEN  | WHY   | HOW  |
|--|---|---|--|
| <b>Cascading vision and strategy</b>                   | <ul style="list-style-type: none"> <li>• During recruitment</li> <li>• On-boarding</li> <li>• Annually or more often</li> </ul> | People need to understand the broader purpose of their work – Why should I join / why am I here   | <ul style="list-style-type: none"> <li>• Recruitment story</li> <li>• New team orientation</li> <li>• Before goal setting</li> <li>• Quarterly team updates</li> </ul> |
| <b>Setting goals and direction</b>                     | <ul style="list-style-type: none"> <li>• On-boarding</li> <li>• Semi-annually or more often</li> </ul>                          | Your team needs to know what they're working on now + your expectations for their deliverables    | <ul style="list-style-type: none"> <li>• Cascaded, SMART goals</li> <li>• Set semi-annually</li> <li>• Revisited monthly</li> </ul>                                    |
| <b>Keeping the team informed</b>                       | Daily to weekly   | People need clear information, fast   | <ul style="list-style-type: none"> <li>• Weekly meetings</li> <li>• JIT emails</li> </ul>  |
| <b>Keeping partners and stakeholders informed</b>      | Daily to weekly   | Your partners and stakeholders need to be aligned   | <ul style="list-style-type: none"> <li>• Ad hoc meetings</li> <li>• JIT emails</li> </ul>  |
| <b>Managing performance and development</b>            | <ul style="list-style-type: none"> <li>• Daily as coaching moments arise</li> <li>• Monthly in 1:1 check-ins</li> </ul>         | Your team needs to understand how they're performing + their development and career opportunities | <ul style="list-style-type: none"> <li>• Feedback and coaching as opportunities arise</li> <li>• Monthly 1:1s with each team member</li> </ul>                         |
| <b>Managing change and ambiguity</b>                   | As it occurs  | Your team needs to stay focused on goals and priorities   | <ul style="list-style-type: none"> <li>• Weekly meetings</li> <li>• Team celebrations</li> </ul>   |
| <b>Creating access and opportunities for your team</b> | Monthly or more often   | Your team needs your help in making things as simple as possible                                  | <ul style="list-style-type: none"> <li>• Purposeful evaluation of what's working and not (weekly meetings)</li> <li>• Purposeful networking for your team</li> </ul>   |

→ **Quarterly** team meetings (updates) focused on strategy, goals and progress and topline information

**Monthly** 1:1s focused on individual performance, development, and career interests

**Weekly** team meetings focused on the week's key activities, challenges, and information or other resources needed

as information unfolds and the team needs to know this

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# Delegation & Empowering Others



## **i** 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:

**More on what you can Delegate ...**  
What Types of Task Can You Delegate?

There are quite a few things you could probably easily delegate and absolutely should be delegating. These will include: routine tasks, development tasks, a task that someone else is better at, another person with regular insight to, They should know whether it will probably be the opportunity

**Benefits of Delegation**

- Benefit to you:**
  - Respect from your team
  - Free-up time to do tasks for which you are accountable
  - More time to focus on broader needs of a business, e.g., group vision, purpose, and strategy
  - Avoiding burnout
- To the individual team member:**
  - Development
  - New skills
  - Empowerment
  - Responsibility
- To the organization:**
  - Higher productivity
  - Cost savings
  - The right people doing the right jobs
  - Employees who are committed
  - Higher levels of teamwork and collaboration
  - Shared learning
  - Allowing autonomy at every level

**The different levels of Delegation**

Level 2: Let me know the pros

Level 4: Explore the issue, make recommendations and we can discuss, but ultimately you will decide

Level 6: You consider, decide, and complete the task and let me know when it is done

Level 5: You consider and let me know what you have decided. Call me if you need support

Trust & Confidence

4 5 6

on discuss it together

Hands On

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# Developing Others



## **i** Overview

If you lead other team members, a critical part of your role is continuous development of your team members. Learn best practices, tips, and techniques and gain access to tools to help you develop your team, whatever the development objective may be.



### Learn about:

- Understand why developing your team is so important
- Learn key techniques for employee development
- Learn a best practice model for coaching

### Key topics covered:



- Importance of Development
- Key mechanisms for Development
- Coaching
- Conducting development and career conversations



### Why this matters?

For most organizations, if not all, people are your most valuable asset, and may be your most expensive resource. Investing time and other resources in developing team members separates successful organizations from those without such a mindset and continuous focus. Ensuring your people leaders have best practices, tips, and tools to develop their team members is critical to their ability to effectively develop their teams.

## Example Content:

**Why Developing Your Team Matters...**

- Hiring a replacement can cost up to 2.5 x of a departed employee's annual salary
- Employees leaving costs money anyway you slice it
- Your teams, workflows, and culture take a hit too

**From IDEA to COACH**

Workflow diagram: IDEA (Idea) → COACH (Capabilities, Observe, Assess & Prepare, Converse, How to Progress)

**Stay Interview**



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# Establishing and Maintaining Trust



## Overview

Learn how to enhance your effectiveness, speed, and sustainability in gaining and maintaining trust with others - whether your team, partners, stakeholders, or customers. Understand where blind spots may exist and how to address these.



### Learn about:

- The enduring importance of trust, whether in a work environment or elsewhere
- Key skills, behaviors, and approaches that build and sustain trust
- How to create an environment that ensures and reinforces trust, which leads to better engagement and better results



### Key topics covered:

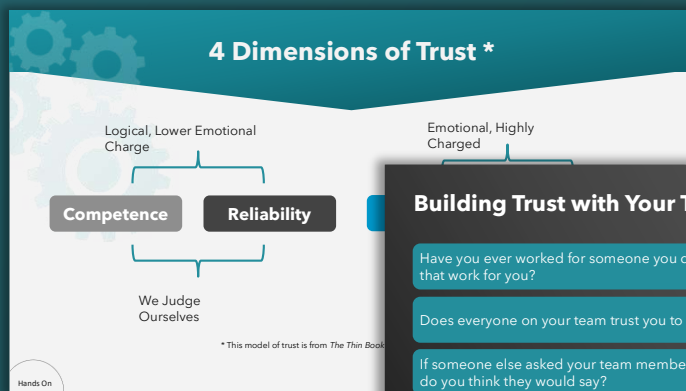
- Hallmarks of Trust
- Behaviors and Skills Required
- Psychological Safety
- Creating and Sustaining an Environment of Trust



### Why this matters?

Trust among your colleagues, direct reports, partners, stakeholders and customers is an underpinning requirement for effective relationships and results. Behaviors and actions that impede trust are often done inadvertently. Understanding where these blind spots exist and how to address them makes you, the team, and overall organization that much more effective.

## Example Content:



**Building Trust with Your Team**

- Have you ever worked for someone you didn't trust? How did that work for you?
- Does everyone on your team trust you to do the right thing?
- If someone else asked your team members if they trust you, what do you think they would say?
- What have you done recently to demonstrate your trustworthiness?
- What have you done recently that may have called your trustworthiness into question with the team?



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# Leading Hybrid Teams



## **i** 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:

### Benefits & Challenges

| Team Location    | Benefits  | Challenges  |
|------------------|---|---|
| Co-located Teams | <ul style="list-style-type: none"> <li>Easier and faster to get to know each other</li> <li>Easy to just "pop-by" for a quick face-to-face chat</li> <li>Easier to get together for a team meeting</li> <li>Gives people an opportunity to get out of their homes and offices</li> </ul>  | <ul style="list-style-type: none"> <li>Dealing with distractions that come from being together</li> </ul> |
| Virtual Teams    | <ul style="list-style-type: none"> <li>Close to everyone, if not all team members, are in the same (working remotely)</li> <li>Costs for relocation, travel, and office space are greatly minimized</li> <li>Relocation and commute stress are eliminated</li> <li>Time wasted on commuting is now reallocated toward work</li> <li>Work-life balance may increase through greater personal flexibility</li> </ul>  |   |
| Hybrid Teams     | <ul style="list-style-type: none"> <li>Allows your company to recruit talent wherever they may reside</li> <li>Provides flexible working conditions for those who need only</li> <li>Develops competence and discipline in communicating and collaborating with an intermix of co-located and remote team members</li> <li>May be more cost-effective for the company, such as reduction of relocation or office space, and other office amenities</li> </ul> |   |

### Team Meetings

**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 and give feedback
  - Check-in with those who don't speak-up
- Close**
  - Celebrate successes and progress
  - Agree next steps
  - Check-in for anything else

### VIRTUAL MEETING TIPS

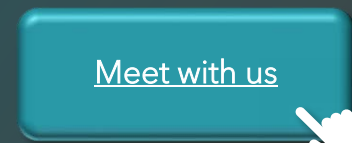
- ✓ Encourage everyone to use their video
- ✓ Enable chat
- ✓ Equalize Q & A
- ✓ Include everyone
- ✓ Survey for feedback

**ONGOING LEADERSHIP TEAM**  
An executive or leadership team responsible for ongoing operations of an organization, business unit, or function.  
EXAMPLE USE CASES:  
• Leading ongoing operations  
• Aligning on a new strategy and integrating new

**PROJECT-BASED LEADERSHIP TEAM**  
A leadership team responsible for leading a project/major change initiative by providing direction, oversight, governance, critical decision-making, and so on.  
EXAMPLE USE CASES:  
• Mergers and acquisitions  
• Designing a new operating model

**ONGOING USED TEAM**  
Team members who are responsible for the business, stakeholders by day work.  
EXAMPLE USE CASES:  
• The teams  
• Teams

**PROJECT-BASED TEAM**  
A team of individuals brought together to deliver work on a specific project for a specific purpose. These teams are often temporary.  
EXAMPLE USE CASES:  
• Designing a company event  
• Designing a new office space



# Leading through Others



## **i** 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 Creative Leadership

**Another Way to Think About the Shift**

**Front-line and Mid-level Leaders**

- Manage teams and daily tasks
- Operational decisions to address immediate issues
- Influence a small group of employees

**Senior Leaders**

- Oversee multiple teams and broader organizational strategies
- Strategic decisions that may impact the entire organization
- Influence cross-functionally and may influence at the enterprise level

**Why Important?**

**Functional Ambassador**

- Educating other leaders and groups cross-functionally as to your function's contribution to the enterprise, and your specific plans, and metrics for success
- Understanding the needs, responsibilities, and issues and needs of other functions and how you want the rest of the organization to succeed
- Working with other functions to promote their functions and strategies



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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.

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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

Hands On

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

Hands On

Stewardship

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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# Setting up Your Team for Success



## **i** Overview

For most industries and organizations, much of the work that is done is through teams, whether you're a formal or matrix team leader. Learn key tips and techniques to ensure your team is set-up for maximum success.



### Learn about:

- Requirements for setting-up your team for maximum success
- Specific practices for team recruitment, on-boarding, and team forming
- Setting effective individual and team member goals and aligning with partners and stakeholders
- Tips and techniques to form and elevate your team

### Key topics covered:



- Successful Team Requirements
- Team On-boarding
- Team Goal-setting
- Partner / Stakeholder Alignment
- Team Alignment



### Why this matters?

Teams are challenged with often critically important goals and objectives. Understanding how to set-up your team for success to ensure goals and objectives are met, within-budget, and on-time, while ensuring their engagement and satisfaction is of critical importance to your success as a team leader and the overall success of your team and the organization.

## Example Content:

**Clear Roles & Responsibilities**

- What are the core responsibilities of your team?
- How does your team's overall role support the mission and strategy of your company?
- What work has to be performed across your team to deliver your core responsibilities?
- How is the overall team's work segmented? (if it's too much for one person to do)
- What are the specific tasks that are needed in each role?
- What are the specific skills required to perform each role?
- Does everyone on your team have a documented job description?
- Have you met with each team member to review their JD and obtain their alignment and commitment?

**Other questions: ?**  
Do you see any gaps in tasks

**Setting Expectations**

| How  | When  | Where  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• How you interact and collaborate with others</li> <li>• How you approach the time and quality of your work</li> <li>• How you engage others when others are involved</li> </ul> | <ul style="list-style-type: none"> <li>• When work is to be completed</li> <li>• When you should ask for resources or help</li> </ul> | <ul style="list-style-type: none"> <li>• Where the work should be completed</li> <li>• Where the work should be implemented</li> </ul> |

1. Align your vision to the organization
2. Ensure your team understands the organization's vision and their roles within this
3. Co-create your team's vision with your team

Develop goals and work plans that enable the vision

Communicate frequently about the organization's and team's

Share success stories as soon as these occur

Support your team for executing to the vision



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# Team Optimization



## **i** 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:

### 8 Characteristics of A High-Performance Team

- Sense of purpose
- Open communication
- Trust and mutual respect
- Shared leadership

#### What Makes a High-Performing Team

- Sense of purpose
- Effective working procedures

#### Benefits & Challenges

| Team Location    | Benefits  | Challenges   |
|------------------|---|--|
| Co-located teams | <ul style="list-style-type: none"> <li>• Easier and faster to get to know each other</li> <li>• Easy to just "pop-by" for a quick face-to-face chat</li> <li>• Easier to get together for a team meeting</li> </ul> | <ul style="list-style-type: none"> <li>• Dealing with distractions that come from being together</li> <li>• Losing productive time commuting to and from the office</li> <li>• Conflicts may more easily and quickly arise due to being together all the time</li> <li>• It's typically more expensive for your company to maintain</li> </ul>   |
| Remote teams     | <ul style="list-style-type: none"> <li>• Easier to interact</li> <li>• Less time spent commuting</li> <li>• More flexibility in work schedules</li> </ul>   | <ul style="list-style-type: none"> <li>• We have to find creative and highly disciplined ways to get to know one another, communicate and collaborate</li> <li>• Depending on where team members reside, managing to different time zones may be an issue</li> <li>• Typically takes longer to get to know one another</li> <li>• If standards, disciplines, and rewards for communicating and collaborating do not exist, or are not strong enough, work quality, engagement and satisfaction may suffer</li> </ul> |
| Hybrid teams     | <ul style="list-style-type: none"> <li>• Flexibility in work schedules</li> <li>• Easier to interact</li> </ul>   | <ul style="list-style-type: none"> <li>• Requires advance planning to ensure all team members feel an equal sense of belonging</li> <li>• We have to watch-out for potential scenarios of favoritism for those in-person team members vs. those who are remote</li> <li>• We have to find creative and highly disciplined ways to get to know one another, communicate, and collaborate</li> <li>• Depending on where team members reside, managing to different time zones may be an issue</li> </ul>               |

#### Team Health Check

Ownership

Fun

Process

Support resources

Value

Goal alignment

Communication

Team roles

Velocity

# 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.

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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 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.

# Career Development

## Overview

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



### Learn about:

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

### Key topics covered:

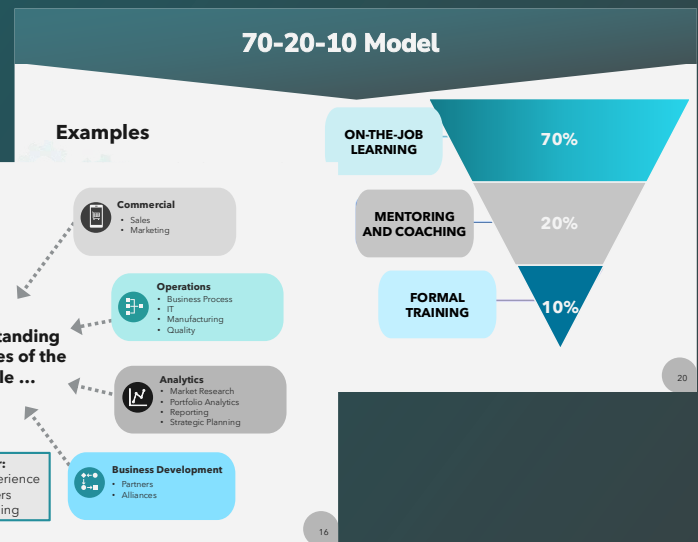
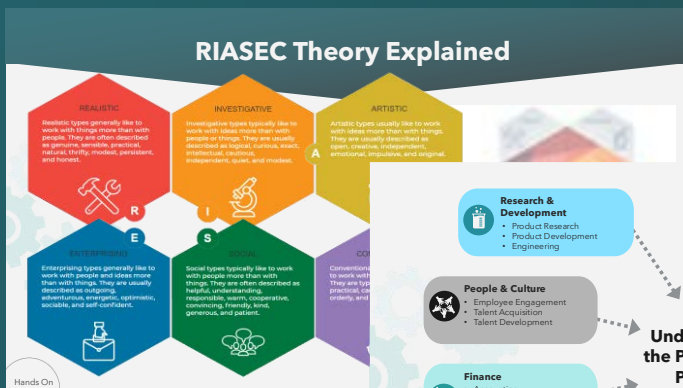


- Understanding and defining career interests
- Personal SWOT analysis
- Finding and aligning support
- Creating robust development and career plans

## Why this matters?

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

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# Growth Mindset

## Overview

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



### Learn about:

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

### Key topics covered:



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

## Why this matters?

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

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# Increasing Resiliency



## **i** 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.

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# Managing Stress and Burnout & Using Learned Optimism



## **i** 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:

**Stress**

- Characterized by over-engagement
- Emotions are over-reactive
- Produces urgency and hyperactivity
- Loss of energy
- Leads to anxiety disorders
- Primary damage is physical

**Burnout**

- Characterized by disengagement

**Benefits of Optimism**

- Better Health**
- Lower Stress**  
Studies have shown that optimistic people tend to have lower stress levels and generally deal with stress more productively.
- Higher Motivation**  
Becoming more optimistic can also help you maintain motivation when pursuing goals. Optimists are more likely to focus on positive changes they can make that will help them reach their goals.
- Better Mental Health**  
Optimists report higher levels of well-being than pessimists. Research also suggests that teaching learned optimism techniques can significantly reduce depression.

**The 3Rs**

- Recognize**  
Watch for warning signs of stress or burnout
- Reverse**  
Undo the damage by seeking support from others (friend therapy) and managing stress (exercising, eating right, sleeping and meditating)
- Resilience**  
Build your resilience through being more mindful and practicing learned optimism

# 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 Personal Branding is NOT**

Personal branding is **not about having a perfect picture on social media** or followers and likes from people or your skills or personality.

It is **not about being a superhero** or being better than other people.

It is **not about being like to be liked**.

Hands On

**Start with Your Own Experiences**

**Is this like everyone else or is it different?**  
Highlight what makes you unique, rather than how similar you are to everyone else. Get rid of anything that should be a given in your field.

**Are you trying to be too much to too many?**  
Is this something that is important and other people will seek when looking to work with someone in your field?

**Will anyone care?**  
There are a lot of buzz words and phrases out there. Avoid using jargon and cliches, focusing on language that is descriptive and articulate.

Hands On

**Personal Brand Pyramid**

- My principles are **Values**
- I'm motivated by **Drivers**
- I'm known for **Reputation**
- My personality is **Behavior**
- I excel at **Skills**
- My style is **Image**

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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



## **i** 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:

| Role   | Responsibility   |
|--|--|
| <p><b>SP Director, Clinical Operations</b></p> <p>Overall Project Manager / Project Manager's supervisor</p> <p>Overall Trial Manager / Clinical Operations Manager</p> <p>Overall Clinical Research Associate / CRA / Clinical Trial Management Associate</p> <p>Overall Clinical Research Associate / CRA</p> <p>Overall Trial Assistant / Clinical Research Associate</p> | <p>Accountable for successful trial execution across several phases of activities.</p> <p>Directs a clinical program which may be a collection of trials, having the same compound class. Or a collection of trials within a therapeutic area. May manage timeline, budget and risk. May represent Clinical Operations during high-level cross-functional meetings and be the Point-Of-Contact for Company Business.</p> <p>Communicate and obtain the necessary information for the successful execution of the trial.</p> <p>Identify the Clinical Trial Management Associate.</p> <p>Point of contact between the Sponsor and the Sponsor's representatives on the trial. May coordinate the trial's execution.</p> |

### Key Roles in Clinical Operations Teams

#### **i** Overview

Clinical Operations involves multiple professionals working together to ensure safe, ethical, and well-run device trials.

Each role supports different aspects of the study, from planning to data analysis.

Hands On



#### **i** Role 1: Clinical Project Managers (CPMs)

- Lead the entire clinical study timeline and budget.
- Coordinate with external partners like CROs.
- Ensure timelines, milestones, and deliverables stay on track.

**Why it matters:** Poor project management can delay trials or create compliance risks.

#### **i** Role 2: Clinical Research Associates (CRAs)

- Visit trial sites to ensure protocol adherence.
- Monitor data accuracy and safety issues.
- Communicate findings and ensure trial integrity.

**Why it matters:** They protect data quality and participant safety on the ground.

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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:

**Cross-Functional Drug Development**

R&D: Research, Early Development, Late Development, Commercialization  
 Quality: Quality Management  
 Production: Lab Scale  
 Clinical Trial: Phase 0, IND - Phase I, Phase II, Phase III  
 Packaging: Pack & Label Design  
 RA: Initial Regulatory Submission Preparation  
 Marketing  
 HR, Finance, IT and more

**Drug Development Milestones**

General

| Early Drug Discovery  | Preclinical Studies   | Clinical Development   | FDA Review  | Post-Market Monitoring  |
|---|---|--|---|---|
| <ul style="list-style-type: none"> <li>• Target Identification &amp; Validation</li> <li>• Hit Discovery</li> <li>• Assay Development &amp; Screening</li> <li>• High Throughput Screening</li> <li>• Hit to Lead</li> <li>• Lead Optimization</li> </ul> | <ul style="list-style-type: none"> <li>• In Vivo, In Vitro &amp; Ex Vivo Assays</li> <li>• ADME</li> <li>• Proof of Concept</li> <li>• Drug Delivery</li> <li>• Formulation</li> <li>• Optimization &amp; Bioavailability</li> <li>• Dose Range Finding</li> <li>• IND-enabling Studies</li> <li>• IND Application</li> </ul> | <ul style="list-style-type: none"> <li>• Phase 1 - Healthy Volunteer Study</li> <li>• Phase II and Phase III - Studies in Patient Population</li> <li>• Dose Escalation, Single Ascending &amp; Multiple Dose Studies</li> <li>• Safety &amp; Efficacy</li> <li>• Pharmacokinetic Analysis</li> <li>• Bioanalytical Method Development &amp; Validation</li> </ul> | <ul style="list-style-type: none"> <li>• NDA / ANDA / BLA Application</li> <li>• FDA Approval</li> <li>• Drug Registration</li> </ul> | <ul style="list-style-type: none"> <li>• FDA Adverse Event Reporting</li> <li>• Supplemental NDA (additional indication)</li> </ul> |

**Begin with the End in Mind**

Within the right drug development framework, one

Pyramid Structure:

- Label: Highest value impact
- Actions: Actions to support strategy
- Label Needs and Wants: TPP and label as driver
- Drug Development and Regulatory Strategy: Pressure testing of strategy



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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:



- Regulatory Agencies
- Clinical Trial Sites & Investigators
- HCPs
- Hospitals
- Payors
- Legal
- Distributors
- Pharmaceutical Manufacturers
- Patients
- Patient Advocates

### Key Stakeholders

**Clinical Trial Sites**

Are where drugs, medical devices and other therapies are tested on human beings. The data received from clinical trials is what the Clinical Trial Sponsor (the company) uses to file for regulatory approval of the therapy.

**Clinical Trial Investigators**

Clinical Trial Investigators monitor clinical trials to ensure these meet the requirements of Good Clinical Practice (GCP) and other regulatory requirements, such as Good Pharmacovigilance Practices (GVP). Their primary role is to oversee the conduct of a clinical trial to ensure the efficacy and safety of the therapy. Every clinical trial has a Primary Investigator (PI) who is often a physician. Most clinical trials have secondary investigators as well.

**Clinical Trial Patients**

These are the pool of patients (humans) who are recruited to test an investigational therapy. These patients are typically recruited by CROs or other vendors independent of the Clinical Trial Sponsor (the company), but not always.



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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 on new products or indications. They are specifically looking for how the product does once the patient takes it; closely monitoring for adverse reactions.
- Safety Scientists:** Serve as proactive stewards reviewing data to anticipate and minimize adverse events with new products or indications. These people serve in Pharmacovigilance roles – in a proactive preventative nature.
- Clinical Development:** Clinical Development, responsible for the development of new products and indications.

**Population Considerations in Drug Safety: The Ambien Story**

After the launch of Ambien, a sleep aid, drug safety researchers discovered that the dose being given to women, which was determined as a result of clinical trials, was not what was needed.

Consideration such as gender, drugs are safe for patients.

**What is Benefit-Risk of Drug Safety?**

Appropriately set expectations for a product and its intended use when the expected benefits (with their uncertainties) of the product outweigh the **potential risks**; and that these are **known and managed** (with their uncertainties and risk management).

Let's use the example of riding a bike!

- What are your expectations before getting on a bike and riding it on the road?
- What are known potential risks?
- Any anticipation for unknown risks?



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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 regulation
- Major laws with the greatest connection to the pharmaceutical / biotech industry
- Healthcare Compliance approaches, roles, and responsibilities within organizations

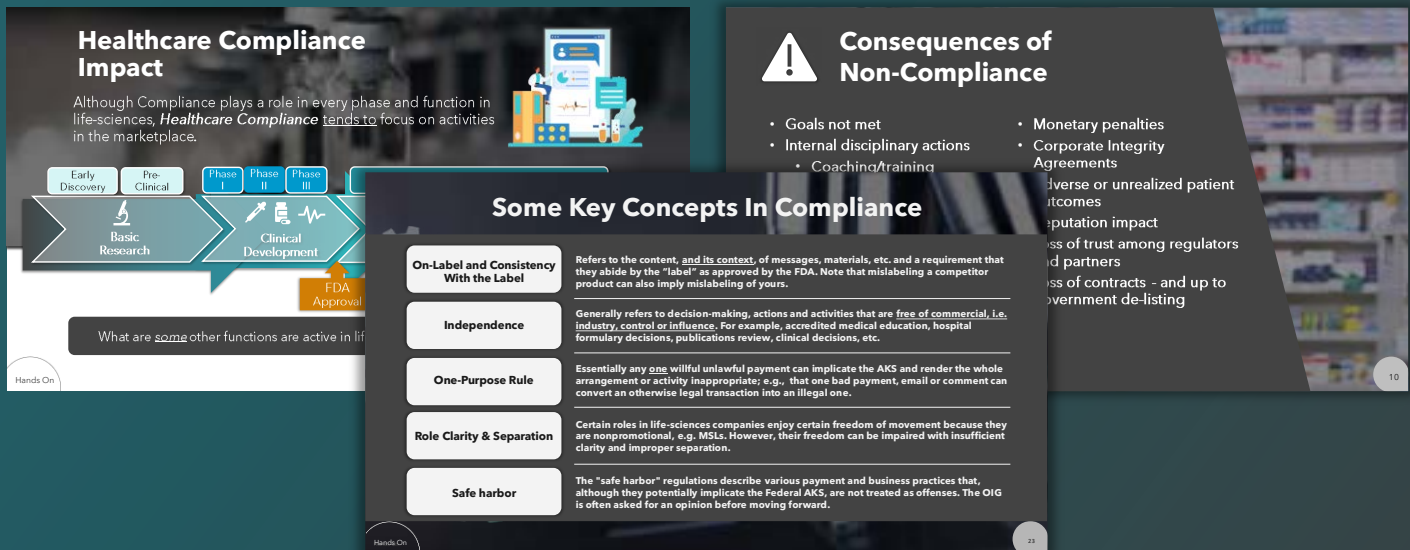
### Key topics covered:

- 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:



**Healthcare Compliance Impact**

Although Compliance plays a role in every phase and function in life-sciences, *Healthcare Compliance tends to* focus on activities in the marketplace.

Early Discovery | Pre-Clinical | Phase I | Phase II | Phase III

Basic Research | Clinical Development | FDA Approval

What are some other functions are active in life-sciences?

**Consequences of Non-Compliance**

- Goals not met
- Internal disciplinary actions
  - Coaching/Training
- Monetary penalties
- Corporate Integrity Agreements
- Diverse or unrealized patient outcomes
- Reputational impact
- Loss of trust among regulators and partners
- Loss of contracts - and up to government de-listing

**Some Key Concepts In Compliance**

- On-Label and Consistency With the Label**  
Refers to the content, and its context, of messages, materials, etc. and a requirement that they abide by the "label" as approved by the FDA. Note that mislabeling a competitor product can also imply mislabeling of yours.
- Independence**  
Generally refers to decision-making, actions and activities that are free of commercial, i.e. industry, control or influence. For example, accredited medical education, hospital formulary decisions, publications review, clinical decisions, etc.
- One-Purpose Rule**  
Essentially any one willful unlawful payment can implicate the AKS and render the whole arrangement or activity inappropriate; e.g., that one bad payment, email or comment can convert an otherwise legal transaction into an illegal one.
- Role Clarity & Separation**  
Certain roles in life-sciences companies enjoy certain freedom of movement because they are nonpromotional, e.g. MSAs. However, their freedom can be impaired with insufficient clarity and improper separation.
- Safe harbor**  
The "safe harbor" regulations describe various payment and business practices that, although they potentially implicate the Federal AKS, are not treated as offenses. The OIG is often asked for an opinion before moving forward.

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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:

### U.S. Healthcare Economics Fast Facts

1. **What %** percent of Americans accounted for half of all U.S. health-care spending in 2017.
2. U.S. healthcare administrative costs are the **(lowest, most competitive or highest)** of all advanced economies.
3. The United States pays **(less, similarly or most)** for healthcare services than other advanced economies.

Hands On

### Importance of Healthcare Economics

By studying health, health delivery and costs, researchers aim to determine and promote what makes and keeps society healthy

Involves the use of economic and policy elements such as:

- Production
- Efficiency
- Disparities
- Competition
- Regulation

Improved information and education may influence efficiencies, cost containment and opportunities of improved equality for healthcare.

Hands On

### Harvard Business Review's (HBR) Healthcare Economic Components

**Spending Growth**  
Reacting to the rise in healthcare spending involves determining the how and why as well as geographical and technological influences.

**The Role of the Patient**  
The patient is the consumer of healthcare, and depending on their choices and willingness to pay, drives the demand, use or non-use of medications, procedures or treatments.

Source: <https://online.hbs.edu/blog/post/what-is-healthcare-economics>

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# Intro to CMC



## Overview

Learn about the function and field of Chemistry, Manufacturing and Controls (CMC), and the role this function and team plays throughout the medicinal product lifecycle.

### Learn about:

- CMC Overview
- Relevant CMC Regulations
- CMC Across the Product Lifecycle
- Deep Dive on CTD
- Facilities, GMP & Compliance
- CMC Roles & Responsibilities
- CMC Emerging Trends

### Key topics covered:

- Understand general CMC principles and practices
- Understand relevant regulations
- Learn CMC activities across the product lifecycle
- Understand the detailed nature of CTD
- Understand the integration of CMC with GMP and Compliance
- Learn about different CMC roles and responsibilities and interface with other functions
- Learn about CMC emerging trends

### Why this matters?

Timely, efficient, safe, reliable, consistent and high quality manufacturing of medicinal products is at the heart of medicinal product development, and therefore key to medicinal product development and sustainability. Understanding the critical role that CMC plays throughout the product lifecycle is foundational for any function in the life sciences industry.

## Example Content:

**History & Evolution of CMC**

- Establishing the foundation for drug safety
- Adding effectiveness and manufacturing standards
- Global harmonization and lifecycle approach
- Adapting to innovation and complexity

**CTD Format at a Glance**


- Module 1: Regional administrative documents
- Module 2: High-level summary of Modules 3-5
- Module 3: Quality (CMC core content)
- Module 4: Non-Clinical study reports
- Module 5: Clinical study reports

**Process Flow:**

- Develop early analytical methods for identity and purity
- Define basic specifications for raw materials and process inputs
- Design initial manufacturing process and prepare laboratory-scale batches
- Begin stability studies to assess product shelf life
- Regulatory Link: Included in IND (Investigational New Drug Application) submissions to support first-in-human trials

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# Market Access

## Overview

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



### Learn about:

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

### Key topics covered:

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

## Why this matters?

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

## Example Content:

**The Evolution of Market Access**

|  | 2000  | 2018   | 2019  | 2022 and Beyond |
|--|---|--|---|-----------------|
| <b>Pharmaceutical Companies</b>            | <ul style="list-style-type: none"> <li>• Began to address payer needs requirements</li> <li>• Goal: Secure reimbursements and pricing. Use in many patients with ability to offer lower prices for quantity</li> <li>• Why it works: Drugs used in large patient populations and HCPs are drivers of medication decision</li> </ul> | <ul style="list-style-type: none"> <li>• Patents for large-scale successful drugs expire and pharma explores new therapy areas</li> <li>• Pharma restructure focus on new therapies</li> <li>• Gene therapy innovation begin</li> <li>• Goal: Address unmet patient population</li> <li>• Outcome: High price therapy</li> </ul> | <ul style="list-style-type: none"> <li>• Research and Development continues to transform to streamline development</li> </ul> |                 |
| <b>Payers (Government &amp; Insurance)</b> | <ul style="list-style-type: none"> <li>• Goal: Cost savings and health system value</li> </ul>  | <ul style="list-style-type: none"> <li>• Goal: Confirming sustainability of systems and prices</li> </ul>  |   |                 |

**Payers in the United States**

An essential element to market access success is determining who will be paying for the product. In the U.S., payment is either through private insurers or the U.S. government

**Private Health Insurance**

- Not funded by the government
- Workplace plans paid by employers
- Individual plans purchased in the marketplace by individuals

**Government Health Insurance**

- Plans funded by the government
- Medicare plans for adults 65+ and younger people with certain disabilities and diseases
- Medicaid plans for low-income individuals

**Consider this:** The two largest buyers of pharmaceuticals, medical equipment, and healthcare services in the U.S. government marketplace are the Veteran's Association (VA) and the Department of Defense (DOD).

**Payers outside the United States**

In most industrialized countries, the government is the payer and healthcare is universal. Many other countries not only have improved access, but also quality and efficiency related to improved cost and delivery measures.

World map showing payer distribution by region.

# 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)

### Examples of Patient Centricity

- Understanding the clinical context for medicines development and evaluation;
- Product design features including formulation and delivery modes that minimize burden and support adherence;
- Development of endpoints that reflect benefits that matter most to patients and which adverse event endpoints are most important for patients;
- Designing trials that support better enrollment and retention and ensure a diversity of participants recruited to be reflective of the target population;
- Informing regulatory decision making including patient acceptability of benefits vs risks vs tolerability concerns; and
- Effective risk management.

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

### Patient Centricity Evolutions



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# Phase 0 Clinical Trials

## Overview

This program will help you understand what options may exist for your organization to pursue regulatory review / approval prior to Phase 1. In addition, the mere exposure to this content helps any life sciences organization prepare for critical Phase 1 clinical trials well in advance of their occurrence.



### Learn about:

- What are Phase 0 trials and how they differentiate from other phases
- The benefits and limitations of Phase 0 trials
- Key considerations when designing and conducting Phase 0 trials

### Key topics covered:



- Overview on Phase 0
- Phase 0 in Detail
- Designing Phase 0 Trials
- Conducting Phase 0 Trials

## Why this matters?

Phase 0 clinical trials can save organizations considerable time and money in understanding the safety and early efficacy of a medicinal product. These early trials can also help organizations understand the broader picture / landscape of what's to come in milestone Phase 1 trials.

## Example Content:

### Why Clinical Trials?

**Does the new treatment work in people?** If it does, doctors will also look at how well it works. Is it better than treatment now being used? If it's not better, is it safer and cause fewer side effects? Or does it work better in people who aren't helped by current treatments?

**Is the new treatment safe?** No treatment or even one already in common use – is without the benefits of the new treatment outweigh the risks.

**Is this treatment better than the standard treatment given for this disease?** Clinical trials help show if a drug or treatment, or a new treatment combination, is better than what is now used.

Hands On

### Phases of Clinical Trials

| Phase | Number of people taking part                    | Therapeutic Area | Main aims of trial  | Is it randomized? |
|-------|---|------------------|---|-------------------|
| 0     | Small - often about 10 to 20 people             | Often Oncology   | Testing a low dose of treatment to check it isn't harmful   | No                |
| 1     | Small - often about 20 to 100 people            | Often Oncology   | Finding the best dose of treatment, what the side effects are, and what happens to the treatment in the body          | No                |
| 2     | Medium - often about 100 to 300 people          | Often Oncology   | Checking the best dose of treatment, finding out more about side effects, and looking at how well the treatment works | Sometimes         |
| 3     | Large - often about 300 to 1,000 people         | Often Oncology   | Comparing the new treatment to the standard treatment or to a dummy treatment   | Usually           |
| 4     | Very large - often about 1,000 to 10,000 people | Often Oncology   | Finding out more about real-world or long-term benefits and side effects  | No                |

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### Phase 0: timeline

10-14 months is the average time of a Phase 0 study

**Preparing labeled compound**

- Labeling your compound

**If you don't already have:**

- Production of GMP material (1-2.4 months)
- Performing a single-dose extended animal toxicity study if needed (1-3 months)

**Logistics and CTA approval**

- Setting up eCRF and eTMF
- Audits and monitoring
- SQP documents (if needed)
- Staff training
- Patient recruitment

**Analyzing data and report**

- Data validation
- Writing report
- Data & Project lock
- Store data for long term

**Good to know's**

- 90% of clinical drug Development fails
- 73% increased probability of success with Phase 0 efficacy data
- Up to 12 years in lost resources can be saved by investing 10-14 months in Phase 0

Source: Tracer

Hands On

# 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:

**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 Outcomes Research HEOR strategy
- Value proposition

Hands On

**Addressing Barriers for Patients and Doctors to Get the Drug**

Strategies must include the three "A":

**Affordability:**

- Increased scrutiny over the effectiveness and value of new medicines given ever increasing prices
- Establishing minimum effectiveness targets for premium pricing along with re-evaluating prices may be considered.
- New initiatives could include a greater role of multicriteria decision analysis, as well as looking at the potential for de-linking research and development from commercial activities to enhance affordability.

**Access:**

- Continued unmet medical need for new medicines across countries
- Growing challenges with funding new medicines at ever increasing prices along with funding increased medicine volumes with the growth in both infectious diseases and non-communicable diseases across countries.
- New models are needed to better manage the entry of new medicines

**Adherence:**

- Factors contributing include those that are related to patients, physicians and health care systems
- Measurement of medication adherence is challenging because adherence is an individual patient behavior.

Hands On

**Value Proposition Testing Approaches**

|  |  |
|--|--|
| <b>When</b>  | <b>Why</b>   |
| <ul style="list-style-type: none"> <li>• Observe for resonance</li> <li>• Participants should report reactions</li> <li>• Reporting the concepts, experience, data outcomes</li> </ul> | <ul style="list-style-type: none"> <li>• Capture perceived benefit</li> <li>• If the value proposition has a cost effectiveness element and the participant shares that they are most concerned with this</li> </ul> |

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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 an IND Application?

The official federal regulatory document of record - FDA requires the IND to initiate clinical trials in the US. First step in evaluating a New Chemical Entity (NCE) in humans for treatment of a targeted disease or when a known drug is under investigation for new clinical indications.

### Phased Clinical Trials

**Phase I Trials**

- After lab testing and largely to test efficacy and safety.
- Involves a smaller number of participants.
- Endpoints must be overall safety and safest dose of the drug.

**Phase II Trials**

- After Phase I testing and to test efficacy and safety and compare to other treatments.
- Involves a larger number of participants.
- Endpoints must be overall safety and initial efficacy.

**Phase III Trials**

- After Phase II testing and to test efficacy and safety and compare to other treatments.
- Involves a larger number of participants.
- Endpoints must be just as beneficial or more beneficial than an existing drug or treatment.

**Phase IV Trials**

- After regulatory approval / post-marketing to continue to study longer-term risks and benefits of the treatment.

**IND**

- Interventional studies are pre-NDA approval and seek to alter a course of treatment.
- Observational studies are post-NDA approval and used to potentially expand or improve the new treatment.

### Pre-IND Meeting Request with FDA

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# Preparing for Phase 2



## **i** 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, it's hard to incorporate strategies to achieve patient centricity. The term 'patient centricity' has a different meaning today. Patients are well aware and prefer to receive clear and transparent healthcare. Healthcare service providers, pharmaceutical companies are looking towards patient centricity as a response to patient demands and the available healthcare.

#### Clinical Trials Summary

| Phase 1                    | Phase 2                                 | Phase 3                                 | NDA/BLA Review-1 year | Phase 4  |
|----------------------------|---|---|-----------------------|--|
| Safety<br>6 mos - 1 year   | Safety and effectiveness<br>1 - 3 years | Safety and effectiveness<br>2 - 5 years | FDA REVIEW            | Post-market review<br>Rare adverse Reactions<br>PI to approval success rate: 10% |
| P1 to P2 success rate: 63% | P1 to P2 success rate: 31%              | P3 to NDA/BLA success rate: 58%         |                       | Source: BiotechPrimer  |

#### Being Patient Centric

- Patient Driven
- Holistic
- Transparent

**Patient-Centered Measurement**



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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:

### Phase 2 vs. Phase 3

| Phase 2   | Phase 3   |
|---|---|
| <b>Study Participants:</b> Up to several hundred people with the disease/condition. | <b>Study Participants:</b> 300 to 3,000+ volunteers who have the disease or condition |
| <b>Length of Study:</b> Several months to 2 years                                   | <b>Length of Study:</b> 2 to 5 years  |
| <b>Approximately</b> 30% of drugs move to the next phase                            |   |

In Phase 2 studies, researchers administer the drug to a group of patients with the disease or condition for which the drug is being developed. Typically involving a few hundred patients, these studies gather initial efficacy data, yet aren't large enough to show whether the drug will be beneficial.

Instead, Phase 2 studies provide researchers with additional safety data. Researchers use these data to refine research questions, develop research methods, and design Phase 3 research protocols.

Hands On

### Trends in Patient Centricity

-  Intelligent patient identification
-  Supporting patient communities
-  Telemedicine

Hands On

### Clinical Development & Market Access

Phase 2 to 3 Integration Considerations

During these stages, if time is available, extensive assessments can determine market access feasibility as well as develop success indicators and accomplish items such as:

- Position in the market as first entry or limited entrants
- Seizing the opportunity to modify clinical development plans

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# Regulatory Affairs 101



## 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 and their responsibilities

### 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:

### What is an NDA?

- A New Drug Application, or NDA, is the official process through which manufacturers demonstrate that a drug is safe and effective for its intended use in the U.S. and seek marketing approval from the U.S. Food and Drug Administration (FDA) to market a **molecule drug**.
- A standard NDA filing **tells the full story** of the drug, including a massive submission to the FDA (and other agencies) containing all data and findings on a drug's safety, effectiveness, manufacturing, and labeling.
- The **Center for Drug Evaluation and Research** (CDER) division of the FDA, oversees NDA submissions to ensure that new drugs meet strict regulatory requirements before reaching patients.

### FDA Review Process

Once FDA receives an application, the review team decides if it is complete. If it is not complete, the review team can refuse to file the application. If it is complete, the review team has **6 to 10 months to make a decision** on whether to approve the drug.

### NDA Submission Process Overview

The process includes the following:

- **Each member of the review team conducts a full review of his or her section of the application.** For example, the medical officer and the statistician review clinical data, while a pharmacologist reviews the data from animal studies. Within each technical discipline represented on the team, there is also a supervisory review.
- **FDA inspectors travel to clinical study sites to conduct a routine inspection.** The Agency looks for evidence of fabrication, manipulation, or withholding of data.
- **The project manager assembles all individual reviews and other documents, such as the inspection report, into an "action package."** This document becomes the record for FDA review. The review team issues a recommendation, and a senior FDA official makes a decision.
- In cases where FDA determines that a drug has been shown to be safe and effective for its intended use, it is then necessary to work with the applicant to **develop and refine prescribing information**.
- Often, **remaining issues may need** to be resolved before the drug can be approved for marketing.



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# HANDS ON

Learning & Organizational  
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