

Adult Action Learning Model Includes:

Key Concepts



Experiential



Action Plan



Habits





Sample Professional Development Programs

To Grow Your Leadership Pipeline

Presented by
Atlantic Consultants

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• Next Level Leadership Program

- **Cutting edge professional development that combines assessment, individual coaching; management training and group coaching**
- **Includes Workbook: Strategies for Success; suggested reading to bolster learning; training that is designed to meet adult learner needs with key concepts, experiential, action plan and habits**
- **Two Programs- One 12 month; One 6 month tailored to your company's learning needs**

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Option 1

Next Level Leadership Program- Classic

- **Objective:**
- Assess and develop high potential managers to achieve skills and methods to effectively manage others; manage self and manage change. Increase leadership competency. Understand how others see them and create proactive actions to be more effective as a leader. Increase cross functional team cohesion. Identify and achieve 3 SMART individual goals.
- Differentiator: Long term bite-size learning implemented through action learning and continued practice.

- **Methodology:**

- Assessment
 - Administer 360 feedback for all
 - Pre-program for leadership, sales, customer service and management
 - Administer DISC Personality Assessment

- Coaching
 - 24 individual meetings (45 minutes each)

- Management Training
 - 12 workshop modules (2 hours each)

- Collaboration with direct supervisors/managers to target goals, impact, measures of success

- **Time Commitment:**

- 12 month program
- 42 total hours per individual
 - 3.5 hours each month

- **Administration and Communication**

- Roll out, roll up, transition and interim administration to assure flow of program

- **Investment**
- Entire program cost includes roll out, roll up, assessment, coaching, and training
 - 10% discount for groups of more than 8 people
 - 20% discount for groups of more than 12 people
- Call for further information

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Option 2

Next Level Leadership Program- Standard

- **Objective:**
- Assess and develop high potential managers to achieve skills and methods to effectively manage others; manage self and manage change. Increase leadership competency. Understand how others see them and create proactive actions to be more effective as a leader. Increase cross functional team cohesion. Identify and achieve 3 SMART individual goals.
- Differentiator: Short term bite-size learning implemented through action learning and continued practice.

- **Methodology:**
- Assessment
 - Administer 360 feedback for all
 - Pre-program for leadership, sales, customer service and management
 - Administer DISC Personality Assessment
- Coaching
 - 12 individual meetings (45 minutes each)
- Management Training
 - 6 workshop modules (2 hours each)
- Collaboration with direct supervisors/managers to target goals, impact, measures of success

- **Time Commitment:**
- 6 month program
- 21 total hours per individual
 - 3.5 hours each month

- **Administration and Communication**
- Roll out, roll up, transition and interim administration to assure flow of program

- **Investment**
- Entire program cost includes roll out, roll up, assessment, coaching, and training
 - 10% discount for groups of more than 8 people
 - 20% discount for groups of more than 12 people

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| • Date | • Topic | • Key Concepts | • Preparation Read or do worksheets below prior to meeting |
|---------------|----------------------------|---|--|
| • | • Communication | • FLAIRS/SPAIRS • Ground rules | • <i>Write your goals on index card for the Management Training.</i> • <i>Communicating Effectively Chap. 1,2 Manager's Survival Guide Chap 4</i> |
| • | • DISC | • Relationship Skills | • Read DISC report Do worksheets from Report on "Strategies for positive Relationships; Management Action Strategy Worksheet; Management Style worksheet all in Section 5 of DISC assessment .Read Comm. Effectively ch.10 |
| • | • Managing Self | • SMART goals • Balance Role Model | • <i>Strategies for Success Complete page 7/9 Wheel of Life- Personal Professional Leadership Skills for Managers Chap 5 7 Habits</i> |
| • | • Managing Self | • Understanding our own roadblocks | • <i>Strategies for Success 13-18 Managers Survival Ch. 5 7 Habits</i> |
| • | • Creating Cultures | • Fish Factor | • <i>Communication Skills Chap 4</i> |
| • | • Managing Others | • The E Factor | • <i>Manager's Survival Chapter 5 &6 Communication Skills Chap 5, 6 7 Habits</i> |
| • | • Managing Others | • Developing, Coaching | • <i>Leadership skills for Managers</i> |
| • | • Managing Change | • Strategies | • <i>Manager's Survival Chap. 9; Comm.Effect. Ch. 10 Leadership Skills. Chap.2</i> |



Adult Action Learning Model Includes:





Key Concepts  Experiential  Action Plan  Habits 

| | | | |
|---|--------------------------------|---|---|
| • | • Team Building | • High Performance Teams | • <u>Leadership Skills for Managers Chap 4</u> |
| • | • | • | • |
| • | • What is a Leader? | • Roles/ Respons. | • <u>Leadership Skills for Managers Chap 1; 10 A Factor</u> |
| • | • | • | • |
| • | • Biz Builder | • <u>Customer retention and recruitment</u> | • <u>Work book</u> |
| • | • | • | • |
| • | • Organizational Skills | • <u>Time, systems, stress management</u> | • <u>7 Habits. DISC Time Mastery</u> |

○ **Definitions:**

- **FLAIRS** Focus Listen, Acknowledge, Respond Strategize
- **SPAIRS** Specify, Person, Attitude, Inquire, Respond, Summarize
- **5 W's** What Why Where When Who
- **SMART** Specific, Measurable, Attainable Results, Time
- **A Factor** Attitude, Actions Assumptions, Accountability
- **EI** Emotional Intelligence
- **E Factor** Energy, Excellence, Emotion, Enable, Execution
- **MVP** Mission, Vision, Performance

• Each meeting has :





- **Key Concepts** 
 - **Experiential** 
 - **Action Plan** 
 - **Habits** 
- Suggested Reading:**
 Briefcase Book Series
Communicating Effectively, Lani Arredondo, McGraw Hill Briefcase Book Series
Leadership Skills for Managers Marlene Caroselli McGraw Hill Briefcase Book Series
 • Articles from HBR and relevant sources
 • 7Habits of Highly Effective People Steven Covey Audio

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Professional Development **Workshops**

- **Each company, culture and industry has unique training needs.**
- **Our training that is customized to yours and designed to meet adult learner needs with key concepts, experiential, action plan and habits. Every training has a slide show with your name on it and handouts and workbook for continued learning and practice.**

- Key Concepts 
- Experiential 
- Action Plan 
- Habits 

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▪ **Option 3**
Professional Development Workshops

- **Objectives**
- Increase management skills. Develop core competencies. Increase manager's ability to manage self, manage change, manage others, manage project. Increase employee retention. Increase levels of professional growth and responsibility.

- **Methodology:**
- Assessment
- Management competency
- Management Training
 - Sample workshops :
 - Communication Skills
 - Team Building
 - Leadership
 - Managing Self
 - Managing Others
 - Managing Life Balance
 - Managing Conflict Dealing with Difficult People
 - EFACTOR Motivating Others
 - Coaching Others
 - Organizational Skills/Stress management/Time management
 - Customer Service
 - Biz Builder
 - Meeting Effectiveness
 - Customer Loyalty
 - Managing Change

- **Time Commitment:**
- Workshops vary between full day and half day commitments

- **Administration and Communication**
- Roll out, roll up, transition and interim administration to assure flow of program

- **Investment**
- Half day workshops
- Full day workshops
- Discounted Package Plans available for combinations that are 6 or more workshops
- DISC Assessment ;10% discount for more than 10 Bundle plans available.

Communication Skills for Leaders

- **Time Option:** Whole day or two half days
- **Pre-work:** DISC Profile
- **Overview:**
 - Communication is the greatest motivation of barrier to both leadership and team effectiveness. Learning key skills in listening, influencing, setting expectations and motivating teams are essential tools for managers and leaders.
- **How You Will Benefit:**
 - Understand your communication style and its impact
 - Learn the different communication styles and how to adjust your style to create the impact you want with internal and external customers
- **Impact:**
 - Improve relationships with your reports, supervisors and team
 - Improve delivered results
 - Improve productivity by clarifying expectations and results

- **Sample Agenda**

- Overview and icebreaker – knowing yourself and others
- Communication IQ
- Your DISC Profile
- Instructive, constructive, and destructive communication
- Learn the FLAIRS model for speaking and listening
- Learn the SPAIRS model for giving constructive feedback
- Learn 5 keys for speaking with impact
- Learn 5 keys for dealing with demanding people
- Communication to inspire results
- Communication that inspires ownership innovation
- Communication pitfalls
- Communication dynamics in teams
- Concept of emotional intelligence
- Challenges – assumptions
- Wrap up and debrief
- Action Plan
- Proactive habits
- Meeting ends



The E-Factor: Motivating and Managing Your Staff

• How do we create a culture of engagement?

- **Time Option:** Whole day or two half days
- **Overview:**
 - Employees join a company, but leave a manager. The E-Factor develops the right leadership skills to develop an engaged workforce.
- **How You Will Benefit:**
 - Learn key methods to set a culture and engage reports staff
 - Learn what to stop/start/continue doing
- **Impact:**
 - Improved employee recruitment
 - Increased retention rate
 - Higher morale
 - Increased productivity
 - Increased customer loyalty

Sample Agenda

- Overview and icebreaker
- DISC Understanding your management style
- Role of manager, leaders and supervisors in creating the “E” culture
- Key Issues in creating a culture of commitment
- Small group – Experiential
- Understanding key elements of motivation
- Understanding key elements of engagement
- Identifying key competencies of job
- Developing staff
- Translating competencies into learning modules, coaching, mentoring and delegation
- Communication (verbal/nonverbal)
- Role-modeling
- Emotional intelligence
- Performance review
- Key methods for being the employee of choice
- Specific E factor methods and plans to increase understanding what motivates people and how to leverage
- Small group experimental
- Wrap-up and debrief
- Action Plan
- Proactive habits

Meeting Ends

What Kind of Leader are You?

- **Time Option:** Whole day or two half days
 - **Pre-work:** DISC Leadership and Management Assessment
 - **Overview:**
 - Leaders set culture, drive results or create mutiny, morass and chaos. What are the key leadership skills in general and in particular to your company?
 - **How You Will Benefit:**
 - Understand core leadership competencies
 - Understand the core competencies needed for your leadership
 - **Impact:**
 - Greater employee engagement
 - Greater confidence
 - Greater productivity, performance, pride
 - Greater strategic impact
-
- **Sample Agenda**
 - Overview and icebreaker
 - DISC- Understanding your leadership style
 - Leadership Role Models
 - Models of Leadership
 - Key competencies for leadership
 - Identifying your strengths and challenges
 - What is your “A” factor?
 - Assess where you are in relationship to the competencies; create a strategy to fill the gap
 - Identify your strengths and find ways to leverage
 - Identify your challenges and create a strategy - Unique Leadership Characteristics (ULC)
 - Understand what creates a culture where performance and commitment thrives
 - Learn about the “A” Factor
 - The 20K foot view
 - Creating a strategy
 - Action Plan
 - Proactive habits
 - Meeting ends

Managing Time, Stress, and Organizational Challenges

- **Time Option:** Whole day or two half days
- **Pre work:** DISC Time Mastery Profile
- **Overview:**
- Managing multiple priorities, business tempo and stress are key skills for everyone. Learn how to prioritize structure and implement proven success strategies.
- **How You Will Benefit:**
- Create a system that works for you
- Time mastery workbook
- **Impact:**
- Getting the eight things done
- Don't get driven by distractions
- Reduce stress
- Reducing 5 minutes each hour of wasted time results in 8.3% increase in productivity

- **Sample Agenda**

- Overview and icebreaker
- DISC
- Identifying 7 habits and their impact on goals, priorities, and results
- Understanding the Big Picture- Strategic Focus
- The Pareto Principle 80/20
- The Kaizen Principle – continuous improvement
- The roll of stress
- Setting SMART goals
- Understanding the Smaller Picture -Tactical Focus
- Analyzing time priorities, distracters
- Developing a system to focus on important, urgent, preventative, maintenance
- Creating structures, systems, habits, schedules
- Setting culture for productivity
- Challenging assumptions about procrastination, meetings, delegation
- Action Plan
- Habits
- Meeting End

Biz Builder

- **Time Option:** Whole day or two half days
 - **Overview:**
 - Everyone has a role in creating and maintaining business development. Here are some strategies to create systems for building your business.
 - **How You Will Benefit:**
 - System and strategy for building and retaining business
 - **Impact:**
 - Increase business retention and recruiting
-
- **Sample Agenda**
 - Overview and icebreaker
 - Developing key strategies for increasing your value proposition
 - Identifying your company and personal strengths, weaknesses, opportunities, threats (SWOT)
 - Developing tactics to maximize strengths and opportunities/mitigate weaknesses and threats
 - What-How-Who-When strategies for connecting with current customers
 - Utilizing your SWOT to find new clients
 - What-How-Who-When strategies for connecting with new customers
 - Action Plan
 - Habits
 - Meeting Ends

Personal and Professional Strategic Planning Self Development

- **Time Option:** Half day
 - **Pre –work** DISC
 - **Overview:**
 - Understanding your strengths, weaknesses and opportunities for improvement are keys to developing yourself personally and professionally.
 - **How You Will Benefit:**
 - Create your own self-development program
 - Stretch yourself to learn something new
 - **Impact:**
 - Close the knowing/doing gap
 - Inspire others to take charge of their own development
 - Enjoy the confidence of new skills and competencies
- **Sample Agenda**
 - Overview and icebreaker
 - Self assessment – personally and professionally
 - DISC
 - Identify key SMART goals to implement change
 - Identifying what is success
 - Creating a strategy and a system to implement
 - Understand roadblocks, barriers and creating a strategy
 - Action Plan
 - Proactive habits
 - Meeting Ends

Building Customer Loyalty

- **Time Option:** Half day
- **Pre Work: DISC Sales Profile**
- **Overview:**
- Research tells us that 68% of customers leave without saying goodbye. The catalyst is most often an attitude of indifference, hostility or curtness. Learn ways to prevent customer flight and create customer loyalty.
- **How You Will Benefit:**
- Maintain and increase customer base
- Prevent the financial impact of customer flight or fight
- **Impact:**
- Top line, bottom line
- Brand loyalty

- **Sample Agenda**

- Overview and icebreaker
- Understanding your listening style using DISC Sales Profile
- Building trust with different styles
- Listening with the “third ear”
- FLAIRS
- 10 Listening Pitfalls
- Customer viewpoint – needs assessment
- Matching your service to client needs
- Creating rapport
- Over-delivering
- Anticipating need
- Preventing conflicts
- Customer loyalty is a team sport
- Communication strategies (in person, over phone, writing)
- Resolving customer conflicts
- Action Plan
- Habits
- Meeting End

Creating and Building Teams

Vision, mission, authority and responsibility

- **Time Option:** Half day
- **Overview:**
- Customer loyalty and employee satisfactions a team sport. How can you build your team
- **How You Will Benefit:**
- System and strategy for building and retaining team and individual goals that are in alignment with strategic goals
- **Impact:**
- Increase business alignment and collaboration

Sample Agenda

- Overview and Ice Breaker
- Key issues in creating and building effective teams
- Symptoms of Team Dysfunction
- Small Group -Experiential
- Break
- Setting mission, vision , values an goals for your team
- the A FACTOR Attitude, assumptions, actions and accountability
- Small Group Experimental
- Wrap up and debrief Action Plans
- Habits
- Meeting ends

Managing Conflict

- **Time Option:** Half days
- **Overview:**
- Learn the 4 ways most people deal with conflict
- **How You Will Benefit:**
- System and strategy for identifying hot buttons and creating a strategy
- **Impact:**
- Increase confidence and conflict resolution and prevention

Sample Agenda

- Icebreaker –Overview
- Communication skills-Preventing Conflict
- FLAIRS/ Feedback, etc
- Experiential- small group

- Break

- Managing Conflict

- Using communication SPAIRS to separate person from problem
- Checking assumptions, beliefs
- Small group negotiation
- Wrap up and Debrief- Action Plans
- Habits
- Meeting Ends

Managing Change

- **Time Option:** Half day
- **Overview:**
- Everyone has a role in creating and managing change
- **How You Will Benefit:**
- System and strategy to anticipate, create and manage change
- Help your staff be able to deal more effectively with change
- **Impact:**
- Increase focus and productivity; decrease distraction of change

Sample Agenda

- Overview and Ice Breaker
- Key Issues in *Creating* Change
- Small Group -Experiential
- Break
- Key issues in *Managing* Change
- Small Group Experimental
- Wrap up and Debrief- Action Plans
- Habits
- Meeting ends

Delegating for Growth and Productivity

What to do instead of changing the light bulb yourself

- **Time Option:** Half day
- **Overview:**
- Growing staff capability and managing your time is connected to delegating. How can you effectively delegate?
- **How You Will Benefit:**
- System and strategy to identify why, who, what, how and when you can delegate
- Help your staff be able to learn the keys to taking on responsibility
- **Impact:**
- Staff development time management

Sample Agenda

- Overview and Ice Breaker
- Key Issues in delegating- what hold you back
- Small Group -Experiential
- Break
- Key methods for delegating- who, what , how when, why
- Small Group Experimental
- Wrap up and Debrief- Action Plans
- Habits
- Meeting ends

How To Run Effective Meetings

Agendas, action items, accountability create more effective meetings

- **Time Option:** Half day
- **Overview:**
- Meetings can motivate or mollify. Learn how to use them effectively
- **How You Will Benefit:**
- Learn an effective template for meeting management
- Understand the dynamics at play in the meeting
- **Impact:**
- Increase productivity, team cohesion, results

Sample Agenda

- Overview and Ice Breaker
- Key Issues in running effective meetings-getting results
- Small Group -Experiential
- Break
- Key techniques for facilitating effective meetings-getting participation
- Small Group Experimental
- Wrap up and Debrief- Action Plans
- Habits
- Meeting ends

Sample Professional Development Program

- **Measures of Success – To be Determined; pending program**
- **Sample**
- Close the gap between current functioning and ideal areas of competency
- Increase levels of professionalism and responsibility
- Increase manager's ability to manage self, manage others, manage change
- Understand and implement expertise to increase management competency
- Understand impact of their behavior and make changes
- Identification and completion of SMART goals
- Increased team collaboration
- Increased scores on 360 to reflect increase competency,
- Behavior change
- Pre/ Post measure of competency

- **The Model:** Assessment/ training/coaching/ team building/reassessment- action learning, experiential depending on model
- **Value:**
- Replacing high potential managers is estimated between 1 and 4 times their salary. Research indicates that the reason why people stay is:
- Professional development
- Feeling valued by direct supervision
- Understand the direction and vision of the company and their role in achieving it
- This program not only impacts the high potentials, but also their reports who will have a higher level of being managed and more motivated. This could impact retention on the next level as well.
- To compile the ROI potential multiply the base salary for each candidate and their reports.

- **The Value of Coaching:** ROI Coaching/Training
- Recent research on the impact of coaching indicates that coaching improves productivity that fuels growth and profitability. Coaching helps managers be able to manage self, manage others and manage their professional growth.

- Manchester, Inc. just completed an ROI for Fortune 1000 companies. The results of the research released an average of 5.7 return on investment. The most significant ROI was in:
 - Productivity Improvements ● 48%
 - Organizational Strength ● 48%
 - Quality Improvement ● 39%
 - Customer Service ● 32%
 - Retention ● 32%
 - Direct Report and Supervision ● 70%
 - Improved Relationships ● 67%
 - Teamwork ● 63%
 - Working Relations with Peers ● 53%

Sample Professional Development Program

- Coaching builds the company's capability to be productive, passionate and competitive in the market by increasing personal and interpersonal management and communication skills.
 - **ROI Professional Development Retention**
 - War for talent is won by companies who invest in their employees. Not only does it increase retention thereby driving down the cost of recruiting (between 10k – 100k per employee) but it actually increases the TRS (Total Return to Shareholder) by up to 200%
 - Professional development, retention, and recruitment is pivotal to the success of any company. In order to retain talent, research tells us that companies that excel invest in their employees. Passion to excel, effective communication, employee commitment, ability to manage change and trust in leadership are key factors in increasing the TRS (Total Return to Shareholders.) In fact, recent research by Watson Wyatt Worldwide found that: The Return on Investment in coaching, training and professional development will then increase value and its competitive edge in the market.
-
- | | |
|---|---|
| <ul style="list-style-type: none">• <u>Companies that had</u>• High trust (internally)• Manage change• Communication• Commitment• Vision, goals, performance alignment | <ul style="list-style-type: none">• <u>Netted better Total Return to Shareholders</u>• TRS outperform by 186%• TRS outperform by 7x greater• TRS outperform by 3x greater• TRS outperform by 200% |
|---|---|
-
- **Options:** This proposal offers 3 options with varying degrees of intensity and outcome. Measures of Success will be determined once program is chose

Sample Professional Development Program

| <u>Workshop→→</u> | <u>Leadership</u> | <u>Communication</u> | <u>Personal Strategic Planning</u> | <u>Organization Skills</u> | <u>E Factor</u> | <u>Customer Loyalty</u> | <u>Biz Builder</u> | <u>Effective Meetings</u> | <u>Delegation</u> | <u>Change</u> | <u>Teams</u> |
|-------------------------------|-------------------|----------------------|------------------------------------|----------------------------|-----------------|-------------------------|--------------------|---------------------------|-------------------|---------------|--------------|
| <u>Competency↓</u> | | | | | | | | | | | |
| <u>Communication</u> | ◆ | ◆ | ◆ | | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ |
| <u>Coaching /Mentoring</u> | ◆ | ◆ | ◆ | | ◆ | | | | ◆ | ◆ | ◆ |
| <u>Organization Skills</u> | ◆ | | ◆ | ◆ | | | ◆ | ◆ | ◆ | | |
| <u>Management Supervision</u> | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | | ◆ | ◆ | ◆ | ◆ |
| <u>Leadership</u> | ◆ | ◆ | ◆ | ◆ | ◆ | | | ◆ | | ◆ | ◆ |
| <u>Staff Development</u> | ◆ | ◆ | ◆ | | ◆ | | | | ◆ | ◆ | ◆ |
| <u>Intellectual Curiosity</u> | | | ◆ | | | ◆ | | | | ◆ | |
| <u>Client Relations</u> | | ◆ | ◆ | ◆ | ◆ | ◆ | ◆ | | ◆ | | |
| <u>Business Development</u> | | ◆ | ◆ | ◆ | | | ◆ | | | | |
| <u>Self Development</u> | ◆ | ◆ | ◆ | ◆ | ◆ | | ◆ | | ◆ | ◆ | ◆ |

Sample Professional Development Program