Hands On Learning

Learning Catalog

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Find the right learning program for your team…

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.

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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.

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Advanced Innovation

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Advanced Selling Excellence

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

Module One: Building the Relationship

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

- Asking probing and clarifying questions to understand who your potential customers are and what they need
- Foundational influencing skills to develop and / or strengthen your ability to influence without authority
- Proven techniques to transition the budding or existing relationship to opportunities for business deals

Module Two: Qualifying the Opportunity

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

- Specifying the need, value and urgency for the client / organization
- Establishing shared agreement and purpose with the client
- Clarifying client-specific details and co-creating action plans with your clients
- Negotiating skills and handling objections

Module 3: Closing the Opportunity

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

- Framing the solution and focusing your client to what they have already established as the need and appetite for your solution
- Advanced negotiation skills to close the opportunity
- A simple checklist to help you ensure all key aspects are covered during the "close"
- Supplemental tips and techniques (like leveraging emotional intelligence

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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 a contemporary strategic planning model and how to apply this to your organization.

Learn about:

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

Key topics covered:

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

Why this matters?

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

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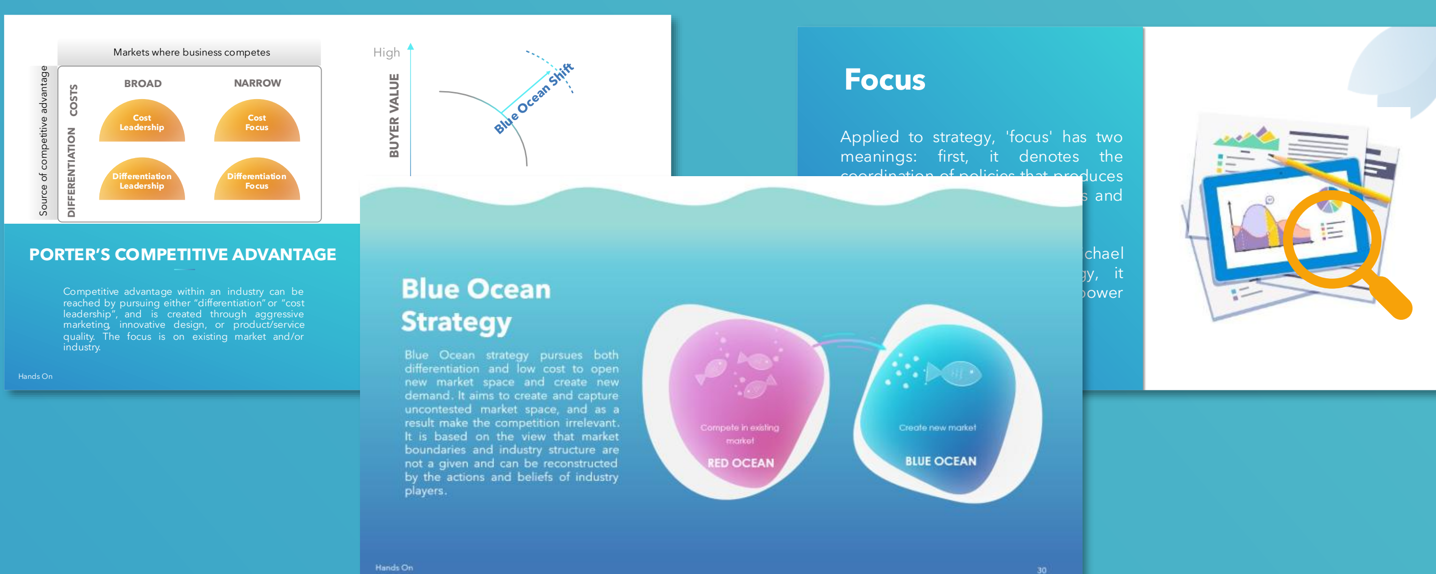

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Agile & Design Thinking

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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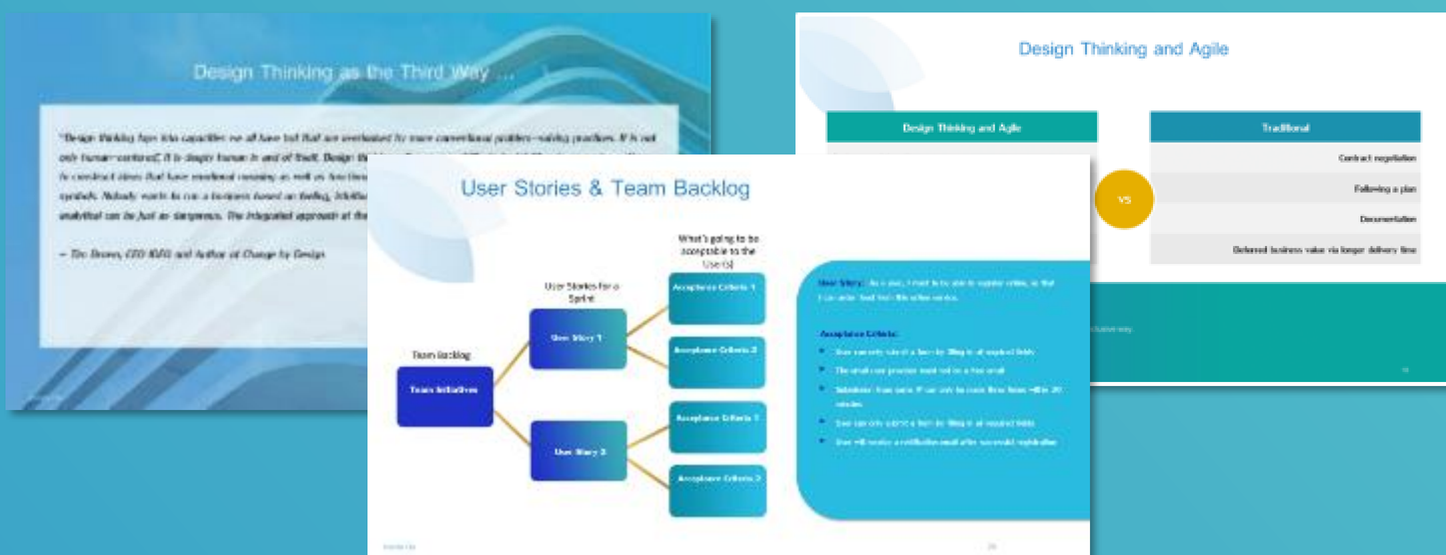

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Budget & Resource Management

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.

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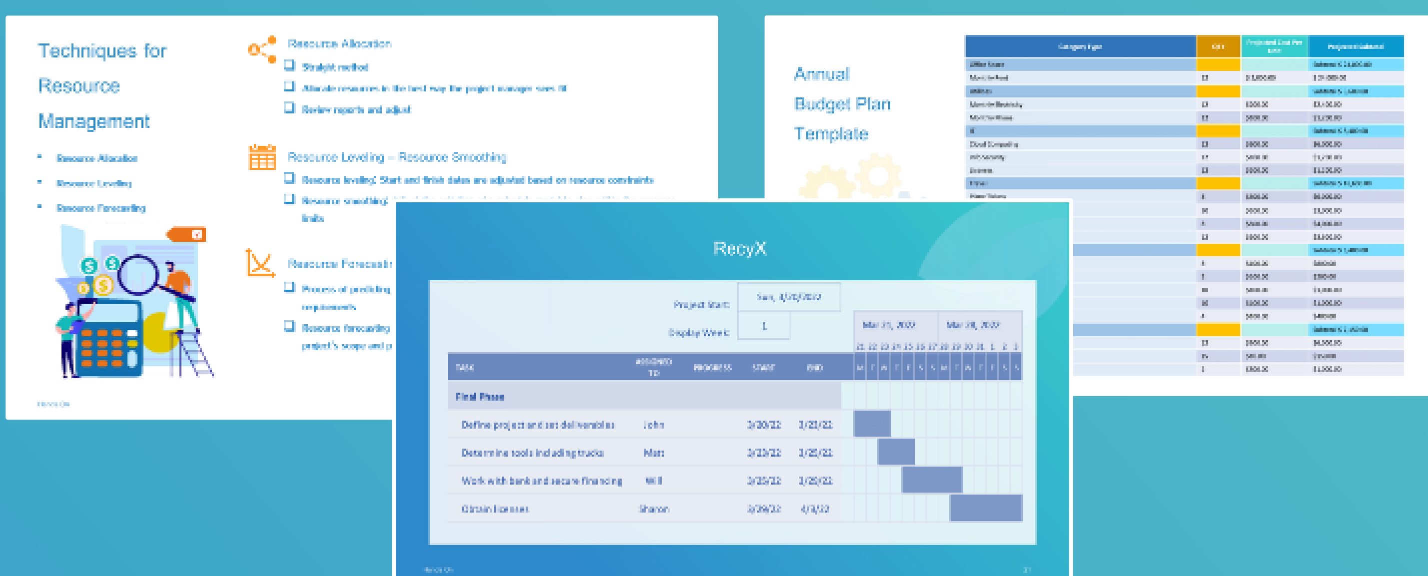

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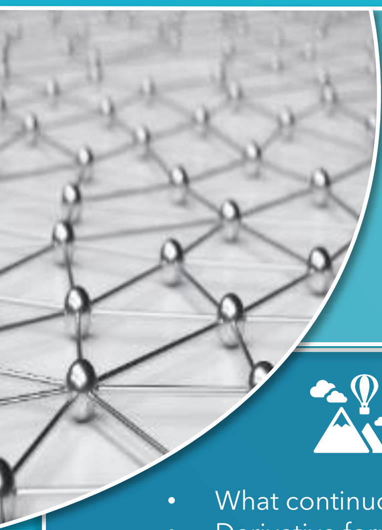
Business Process & Continuous Improvement



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.

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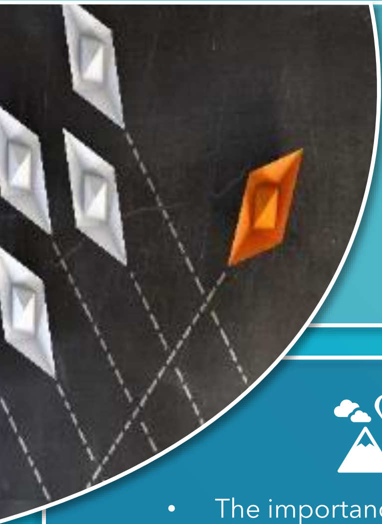
Decision-Making



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:

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

Key topics covered:

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

Why this matters?

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

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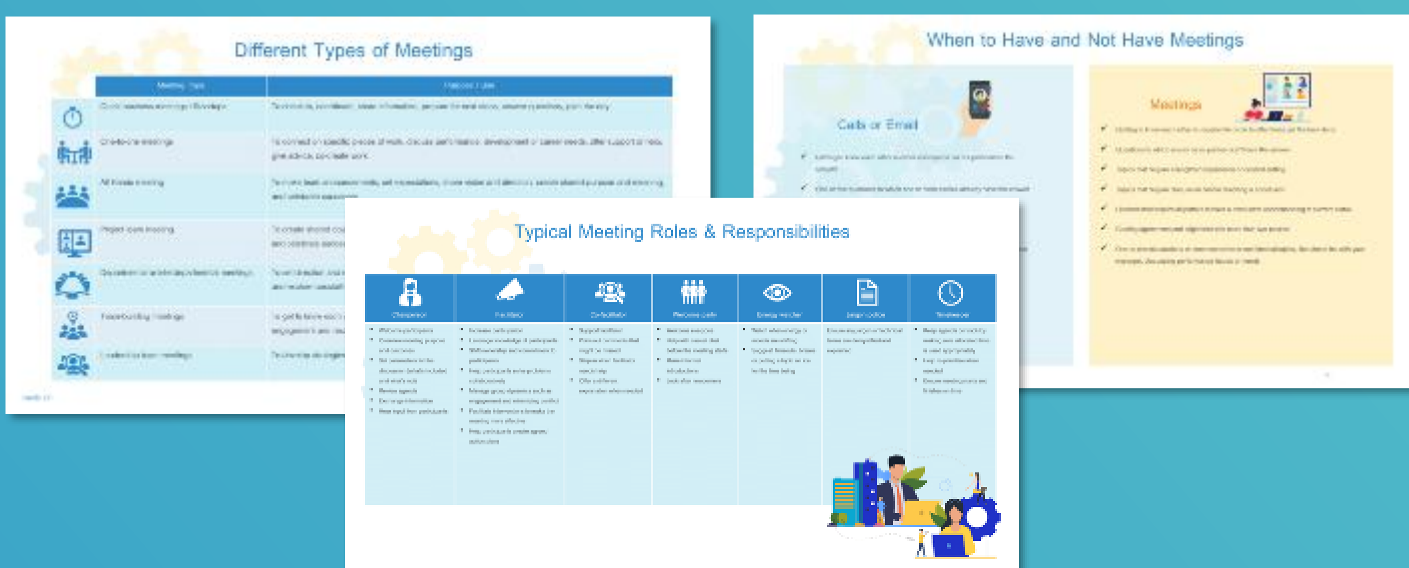

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Finance for Non-Finance Managers

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.

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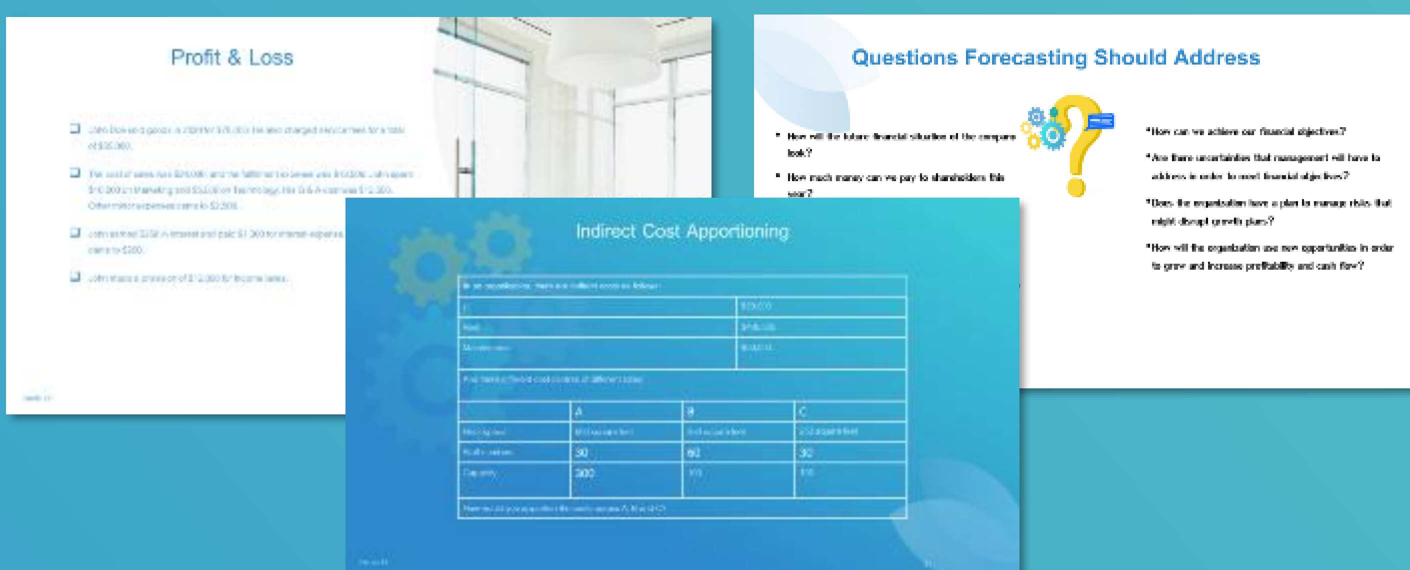

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Ideation & Innovation

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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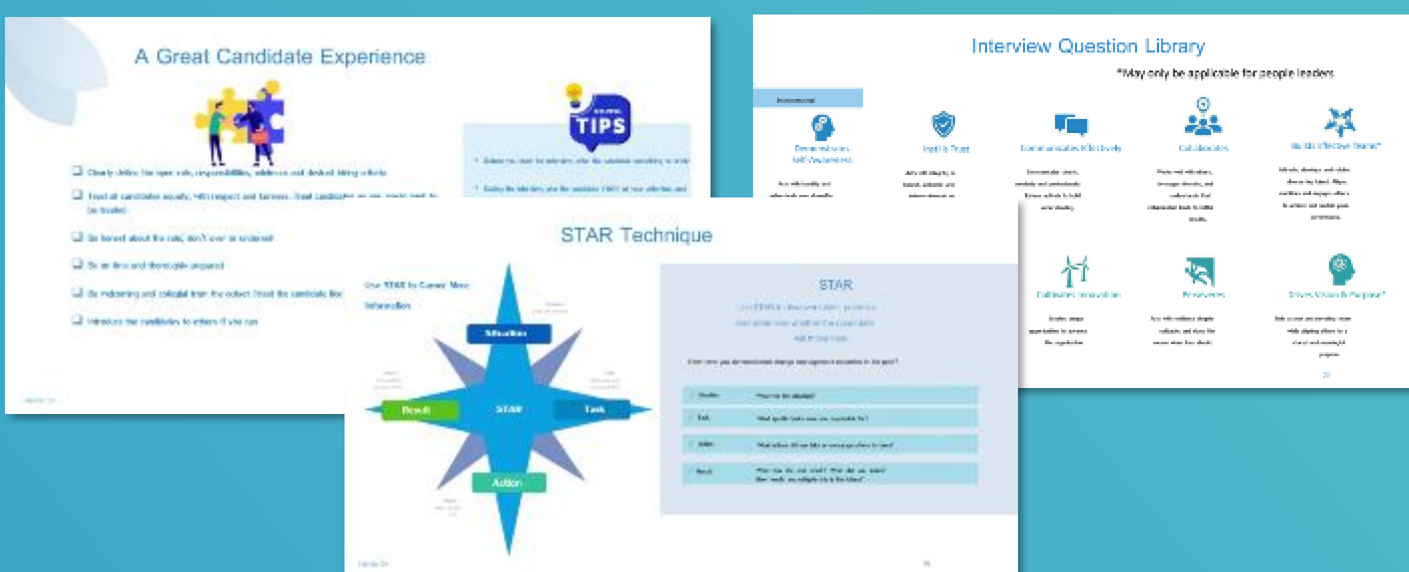

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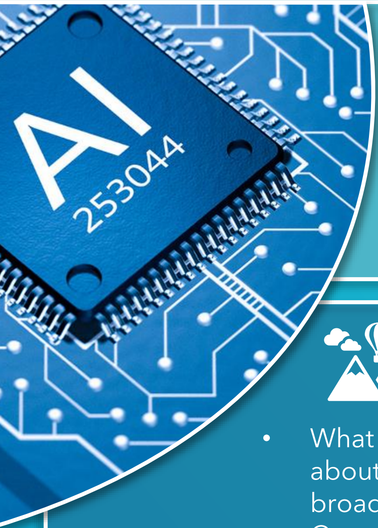
Intro to AI



Overview

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

Learn about:

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

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Intro to Generative AI (AI 201)

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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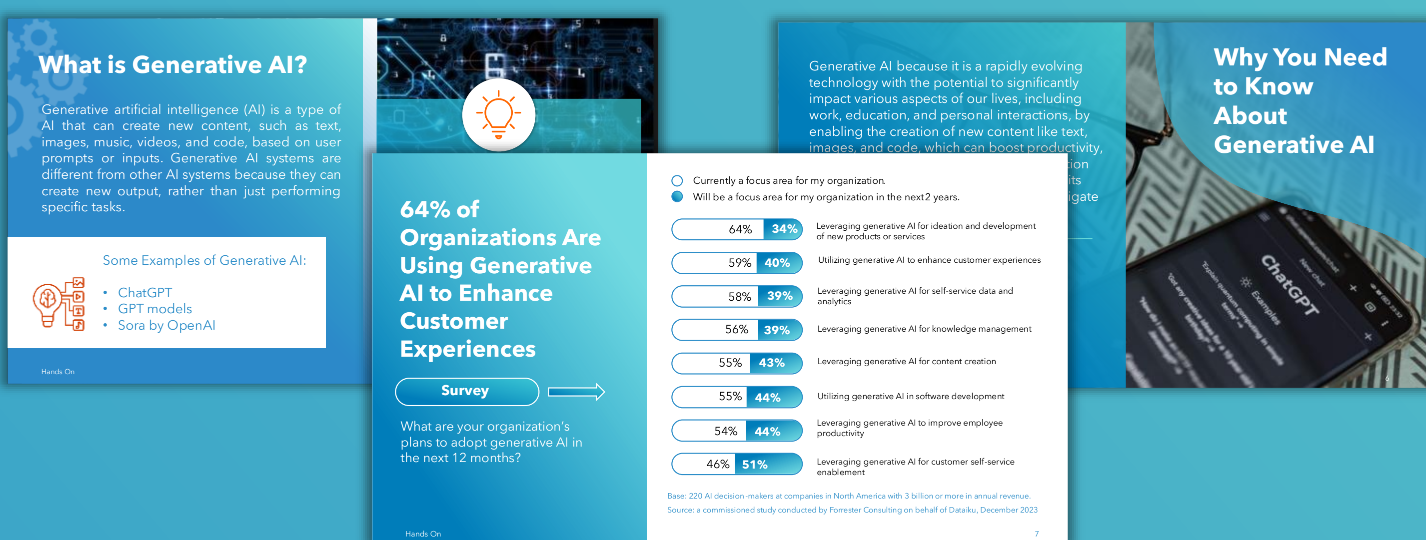

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Leading Change

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Leading Projects

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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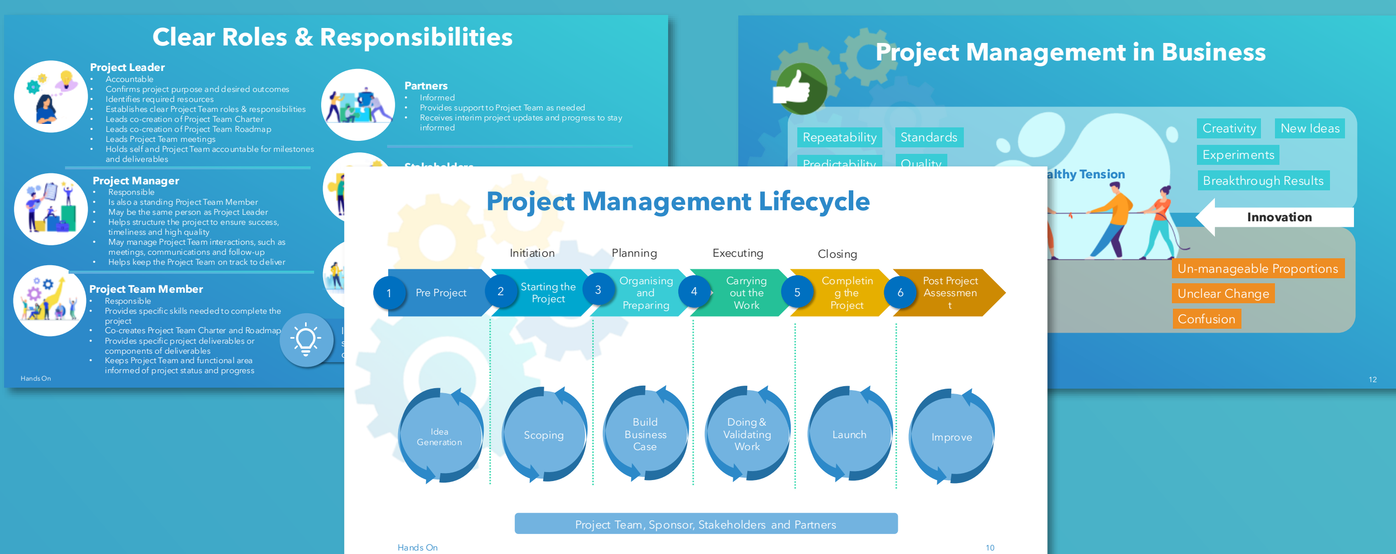

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Marketing 101

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.

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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.

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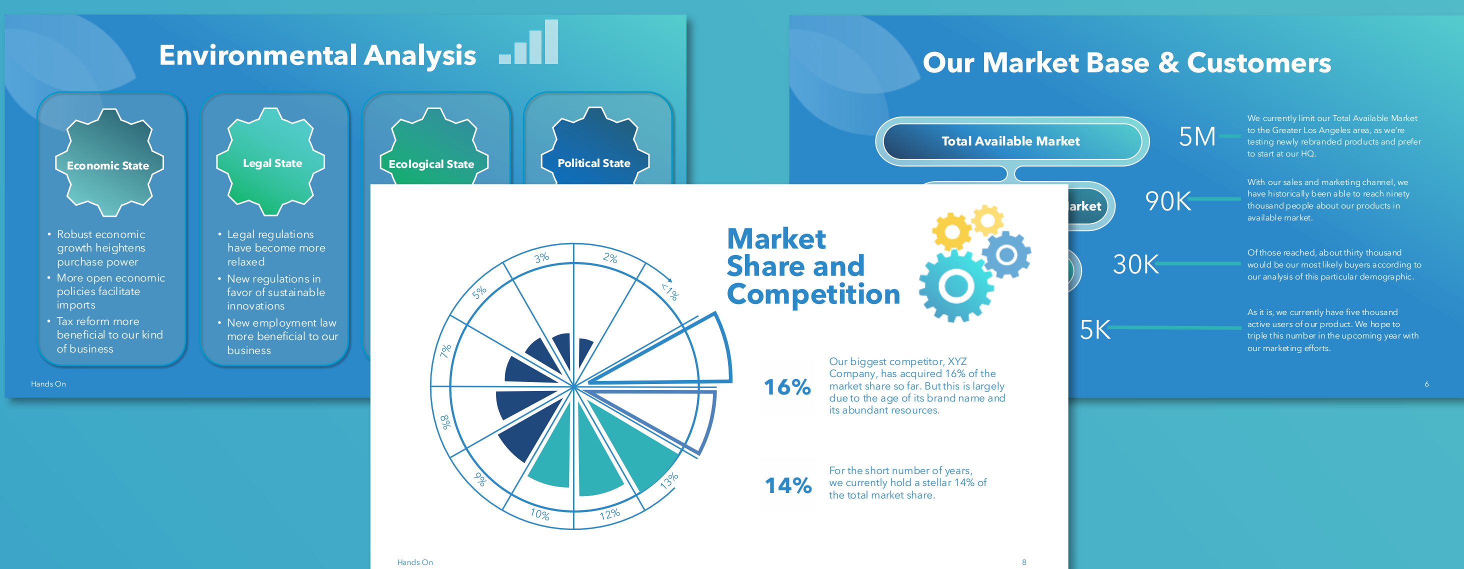

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Marketing Communications

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

Why this matters?

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Personal Time Mastery

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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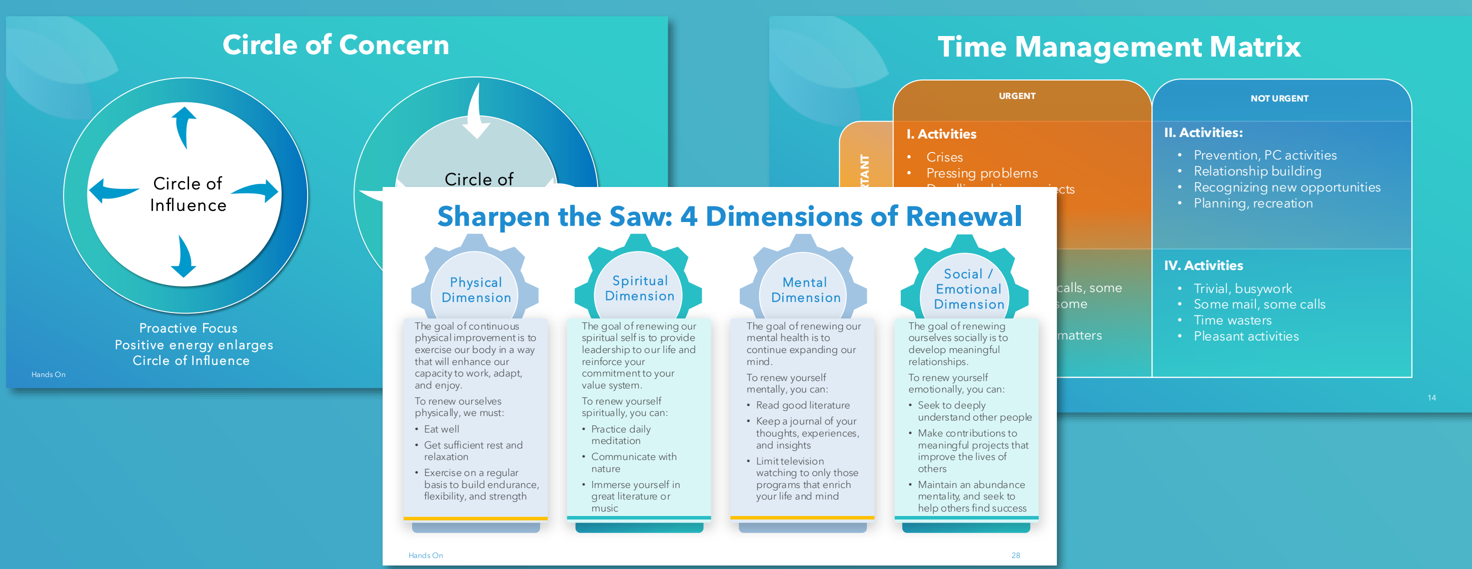

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Presentation Skills

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.

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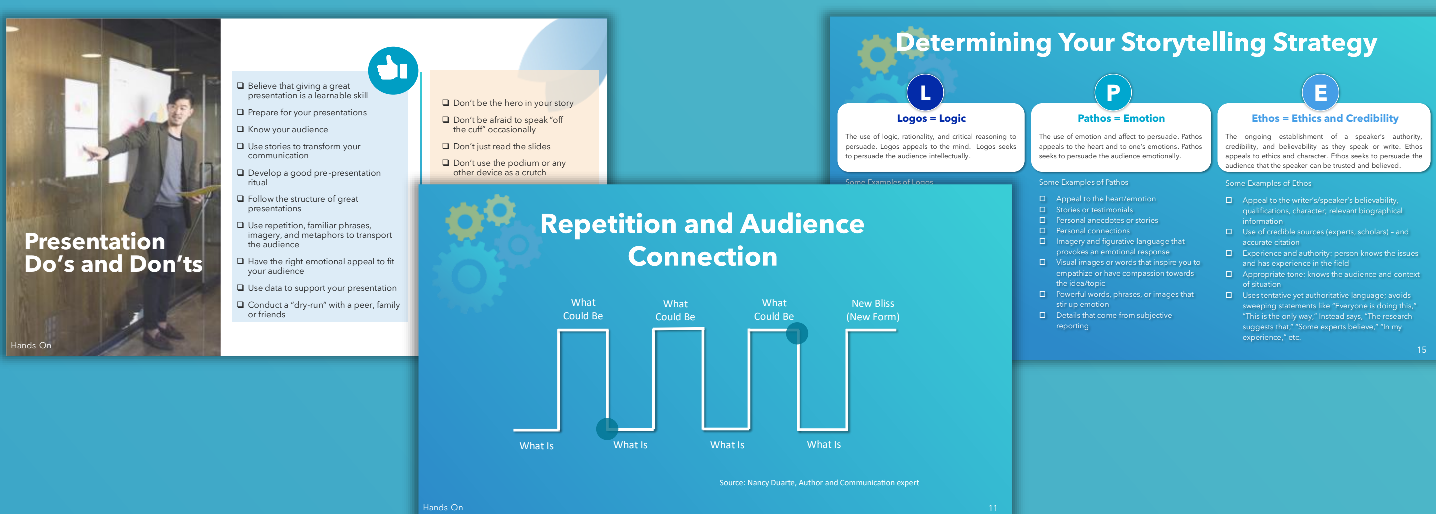

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Portfolio Management

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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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.

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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.

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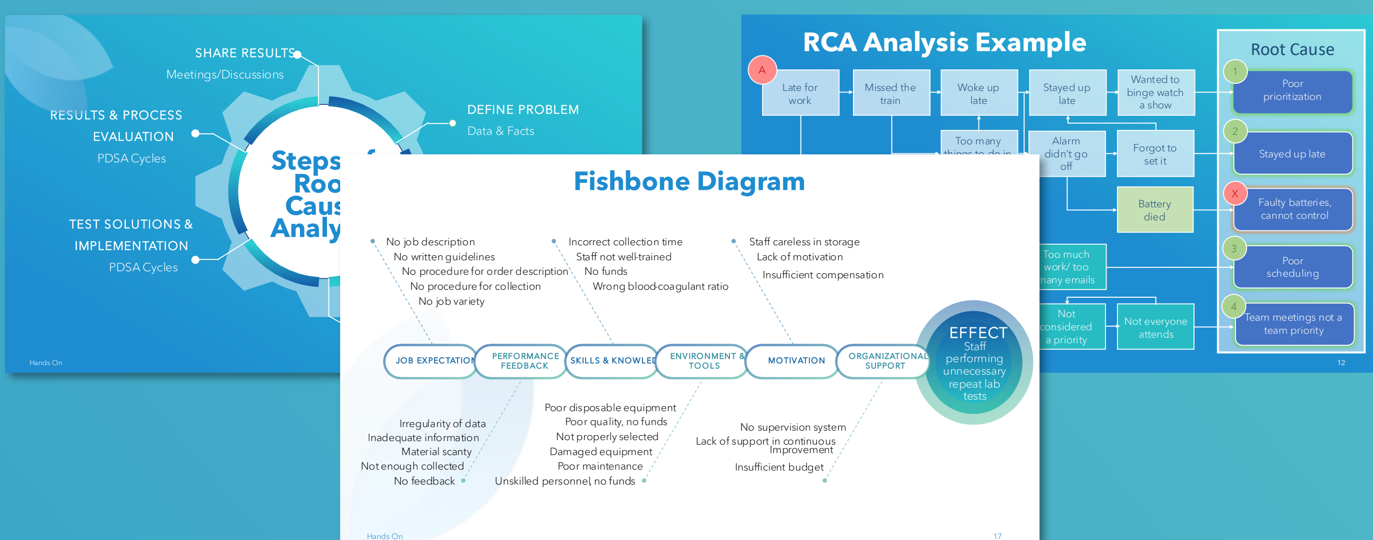

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Selling Excellence

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

Module One: Mastering Discovery

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

- Learn how to ask probing and clarifying questions to uncover macro problems and their root causes.
- Learn and practice the flow between asking questions and offering insights to enhance credibility and engagement.
- Understand the MEDDIC methodology and how it is best applied in various stages of a deal to improve your success rate.

Module Two: Positioning Value

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

- Know how to frame a problem and its negative ramifications.
- Learn how to map your capabilities directly to your customers' pain points.
- Explore how to use pain relief messaging to emphasize loss aversion.
- Practice making firm recommendations and aligning on next steps.

Module 3: The Art & Science of Negotiations

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

- Practice mirroring and labeling techniques to generate feelings of safety and trust in others.
- Learn how to ask calibrated questions to help your counterparts feel in control and receptive to your position.
- Experiment using anchors and other proven tools to gain leverage over your counterparts and achieve the best terms on your deals.
- Receive a Negotiations Cheat Sheet with a list of approaches and tactics to closing a deal.

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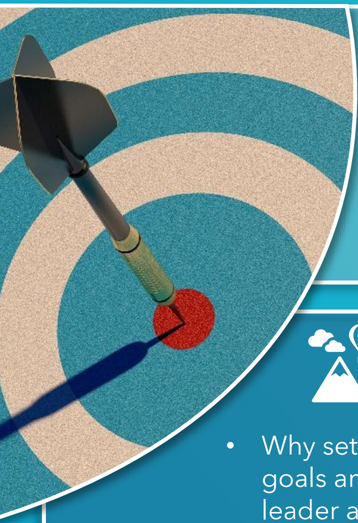
Setting Goals & Expectations



Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Scaling the Organization

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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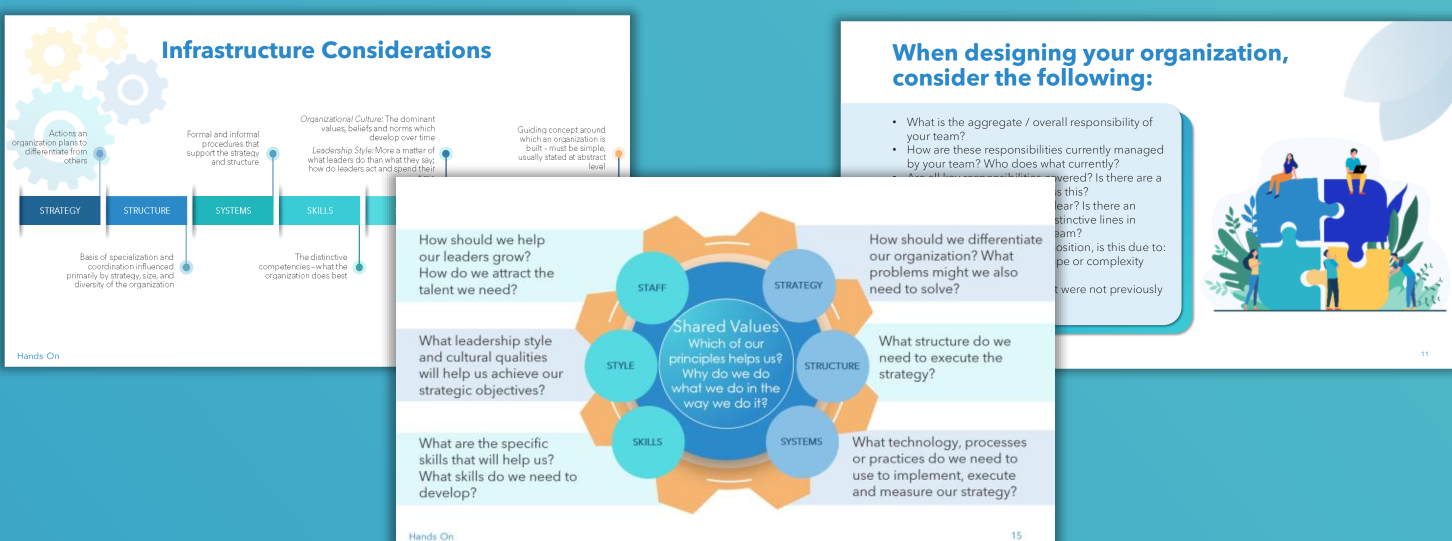

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Strategic Planning

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.

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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

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.

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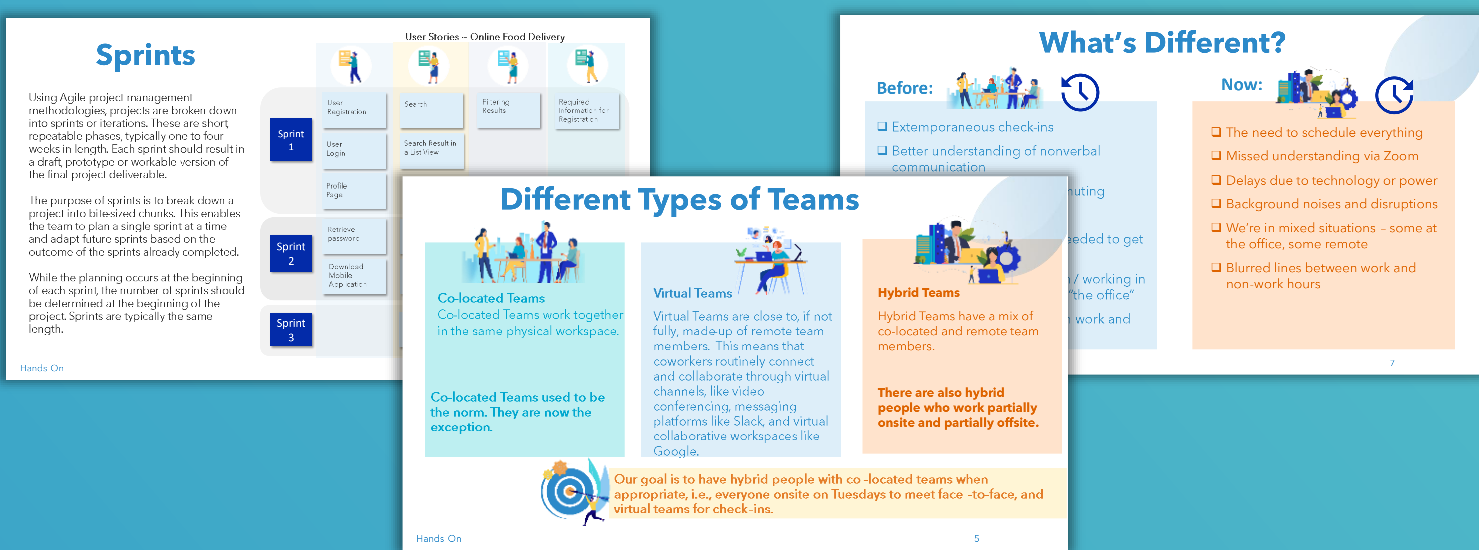

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Communication Skills

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

Conversational Intelligence

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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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.

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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
- Turing 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.

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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.

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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.

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Diversity, Equity & Inclusion

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Mastering Civility

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Understanding Unconscious Bias & Allyship

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Influencing Skills

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

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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.

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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.

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Influencing & Stakeholder Management

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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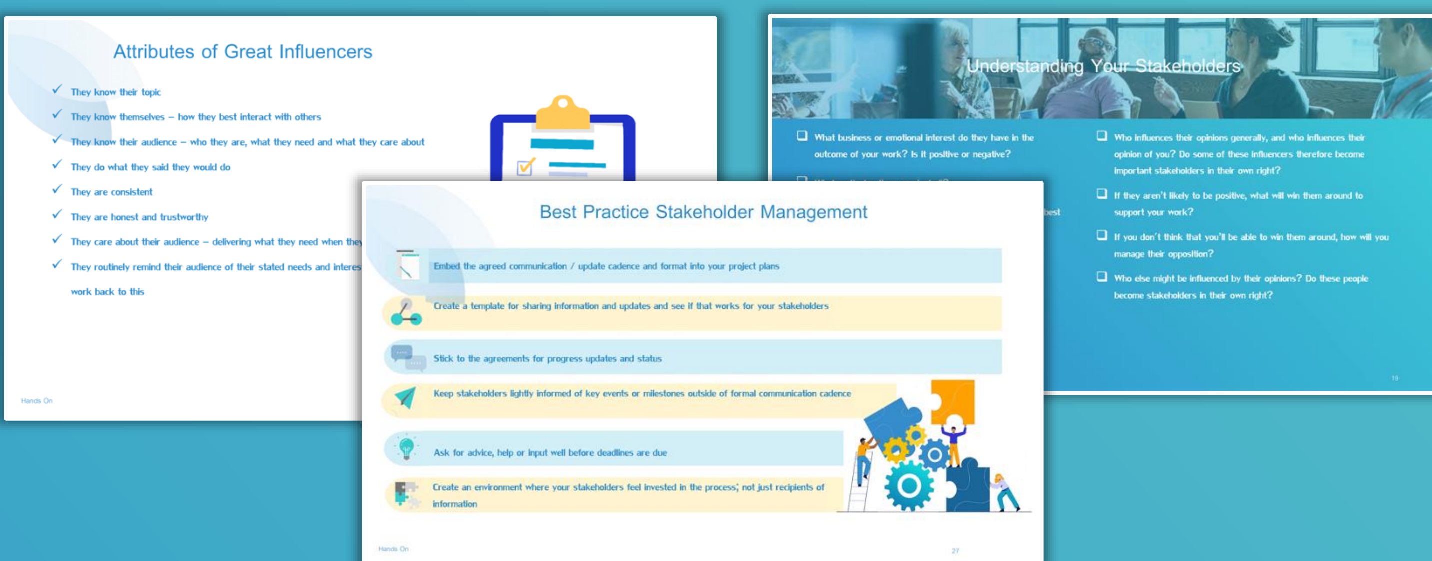

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Navigating Difficult Conversations

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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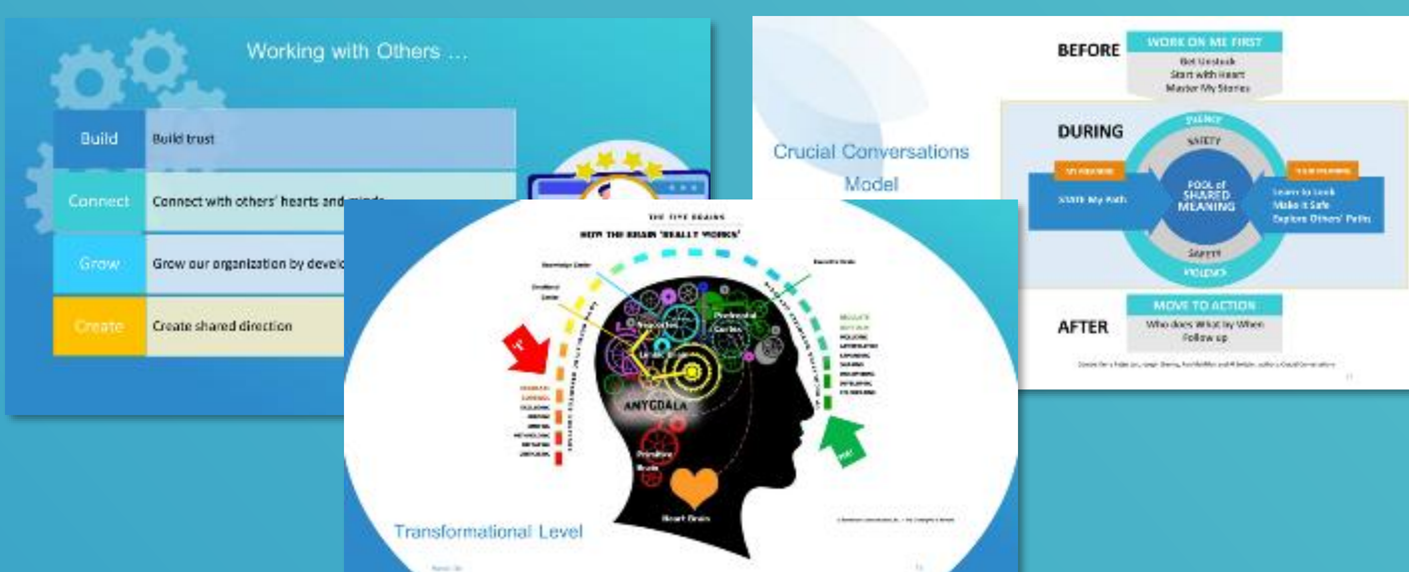

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Leading Others

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

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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.

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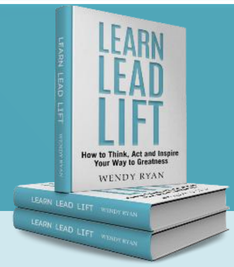
Advanced Leadership Skills

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

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



Module 1 — Introduction to The Learn Lead Lift Framework® (pre-recorded)

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

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

Module 2 — Learn Lead Lift: Required Mindsets (Live via Zoom)

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

Module 3 — Learn Lead Lift: Developing Leadership Skill Sets (Live via Zoom)

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

Module 4 — Learn Lead Lift: Fine-tuning FIDAH aka Leadership Behaviors (Live via Zoom)

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

Being a Leader

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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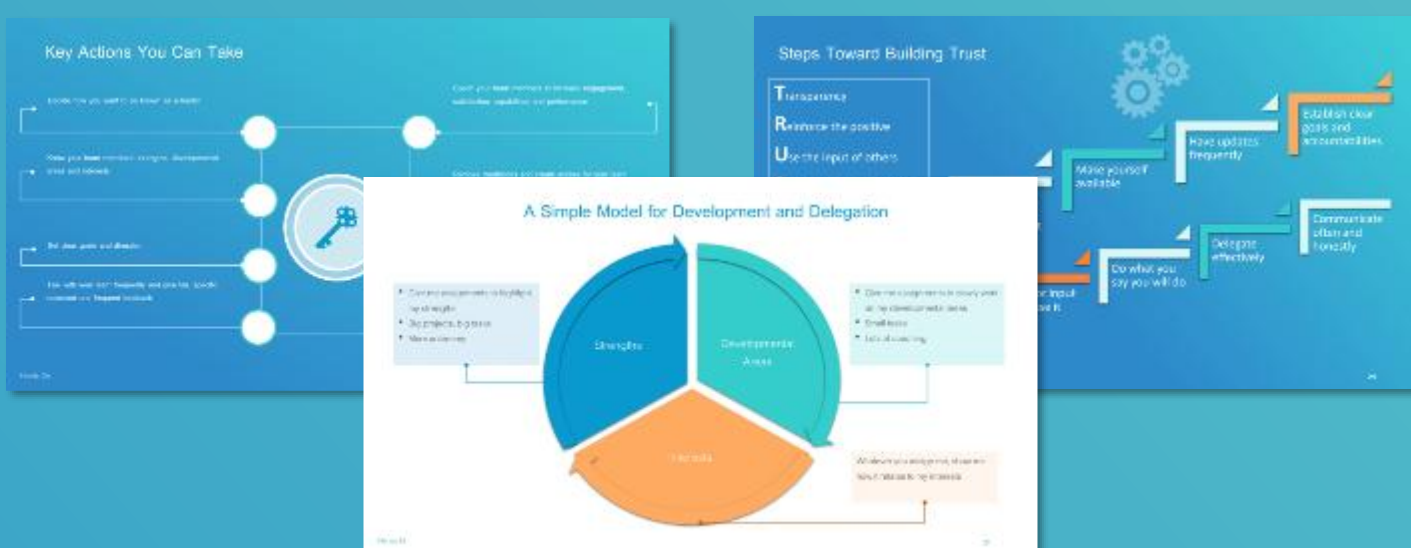

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Being an Inclusive Leader

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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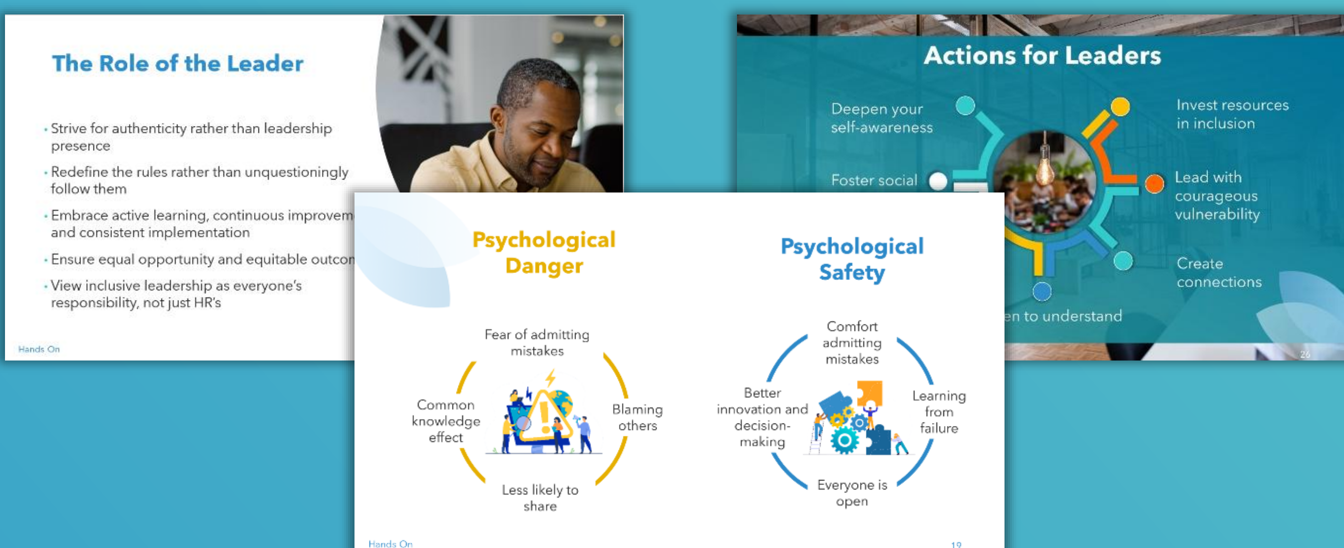

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Being a Resilient Leader

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.

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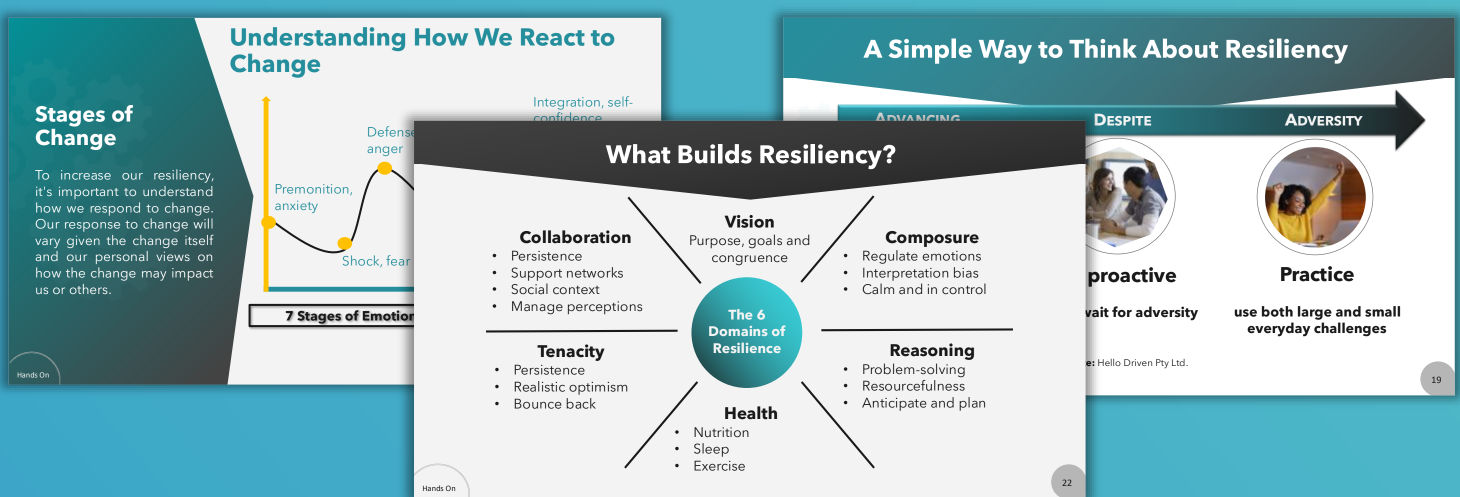

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Creating Culture as a Leader

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Creating Strategic Vision & Aligning Your Team

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Coaching

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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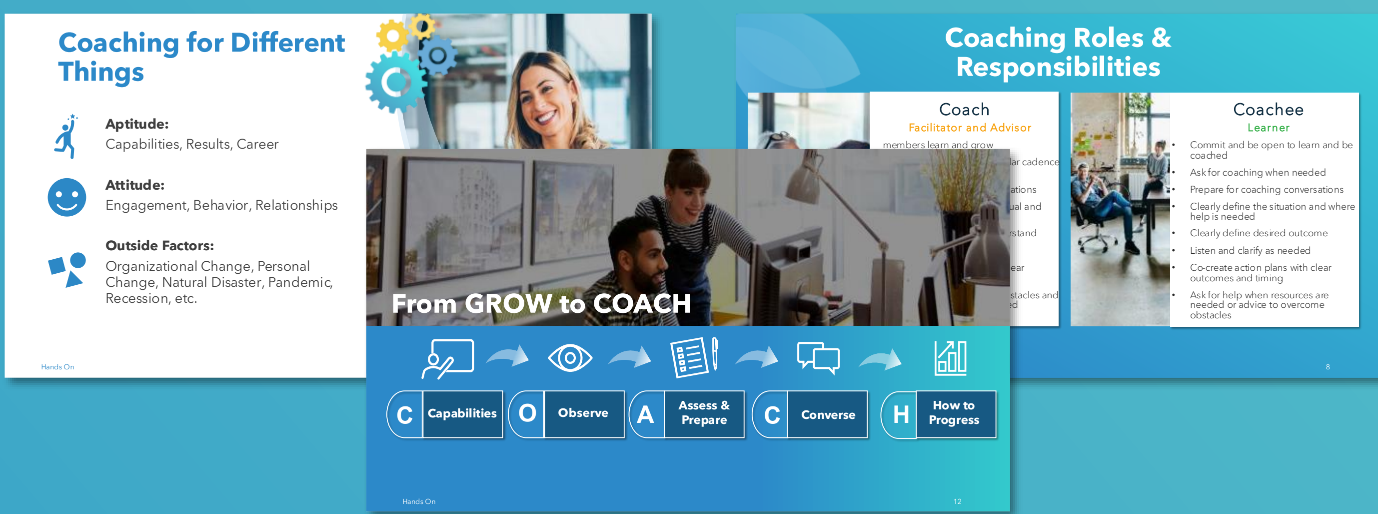

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Communicating as a Leader

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.

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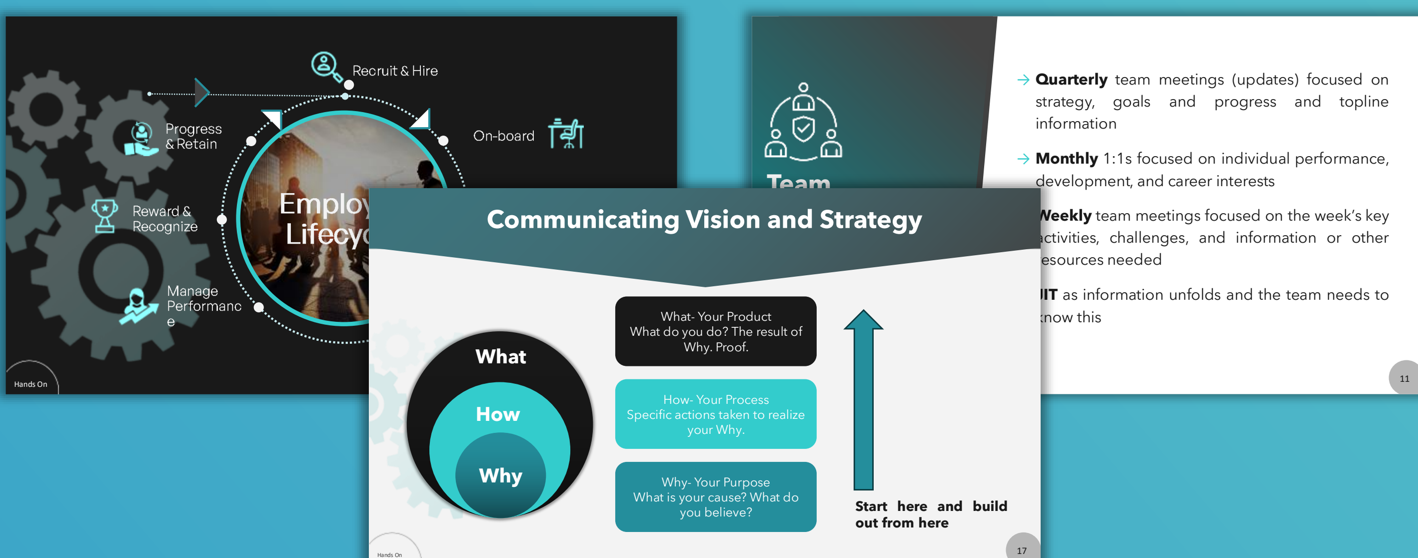

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Delegation & Empowering Others

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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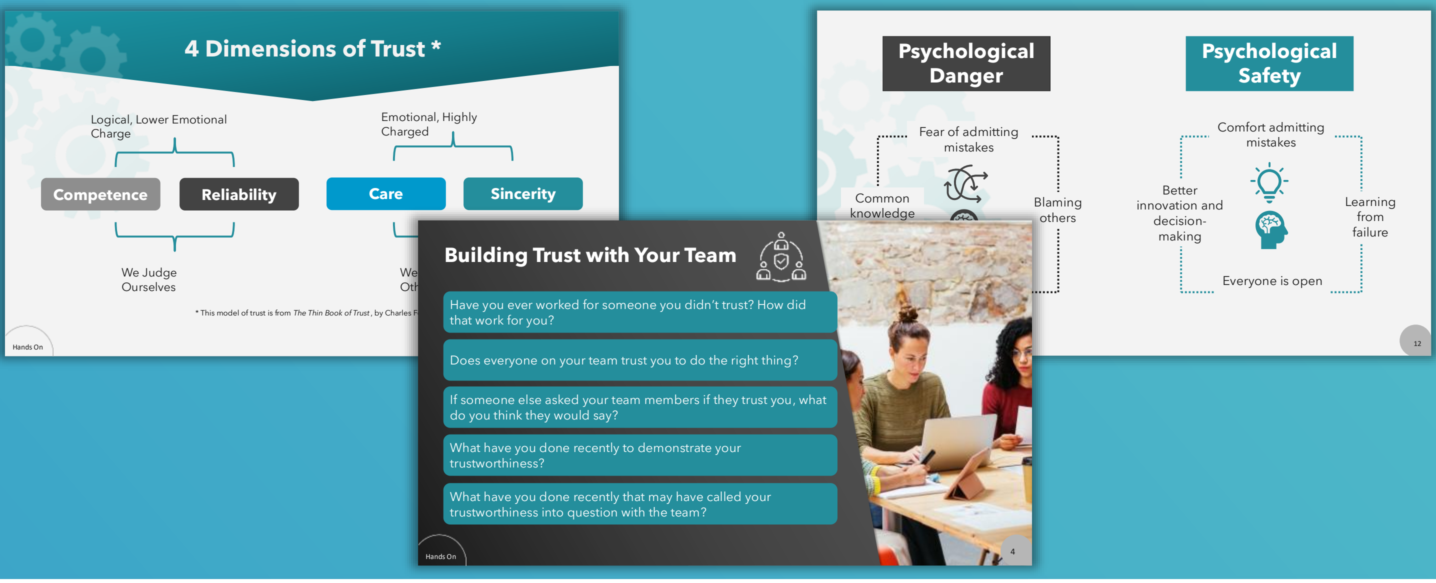

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EXPLICIT EXPECTATIONS:
THE DEFINITIVE COURSE ON MANAGEMENT FUNDAMENTALS

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

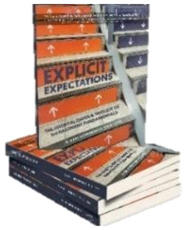
"You expect me to do WHAT?"

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

"What am I responsible for now?"

Program Overview:

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



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

Format

3 Hours

Engaging and Dynamic

Online via Zoom

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

Modules

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

Module 1: Adopting a Leadership Mindset of Growth & Inclusivity

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

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

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

EXPLICIT EXPECTATIONS:
THE DEFINITIVE COURSE ON MANAGEMENT FUNDAMENTALS

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

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

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

Module 4: Final Fundamental & Foundational Factors

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

Learning Objectives:

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

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

Target Audience:

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

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

Benefits:

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

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

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Leading Hybrid Teams

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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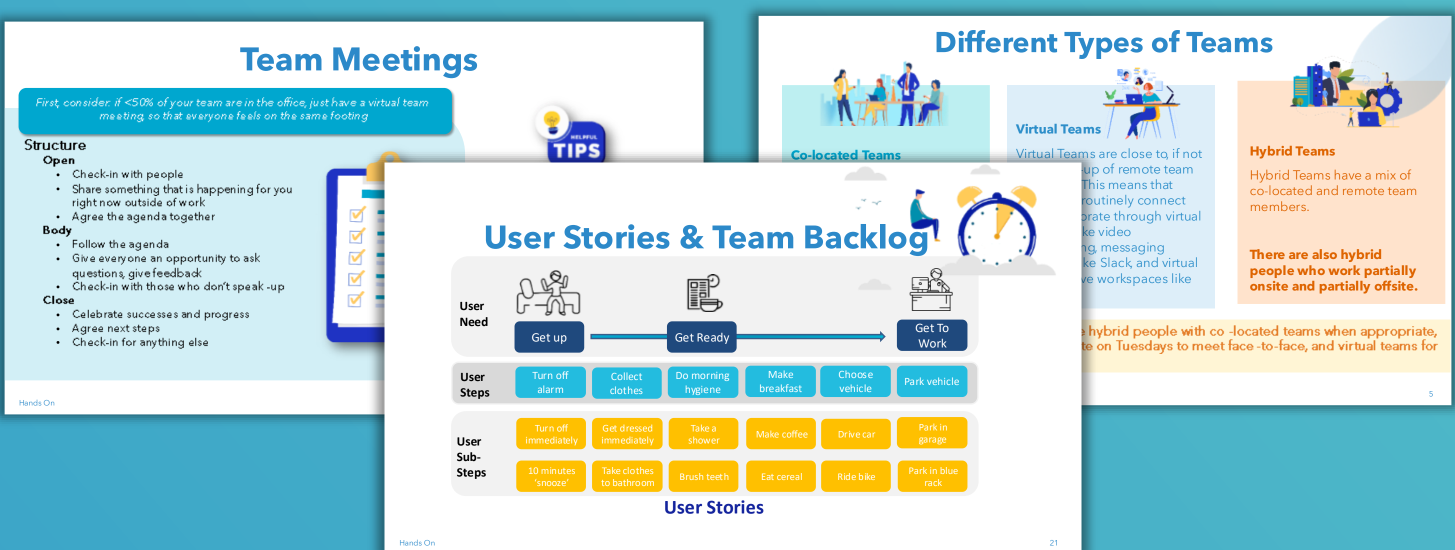

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Leading through Others

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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 inleading 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.

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Setting up Your Team for Success

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 setup for maximum success.

Learn about:

- Requirements for setting-up your team for maximum success
- Specific practices for team recruitment, onboarding, 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.

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Team Optimization

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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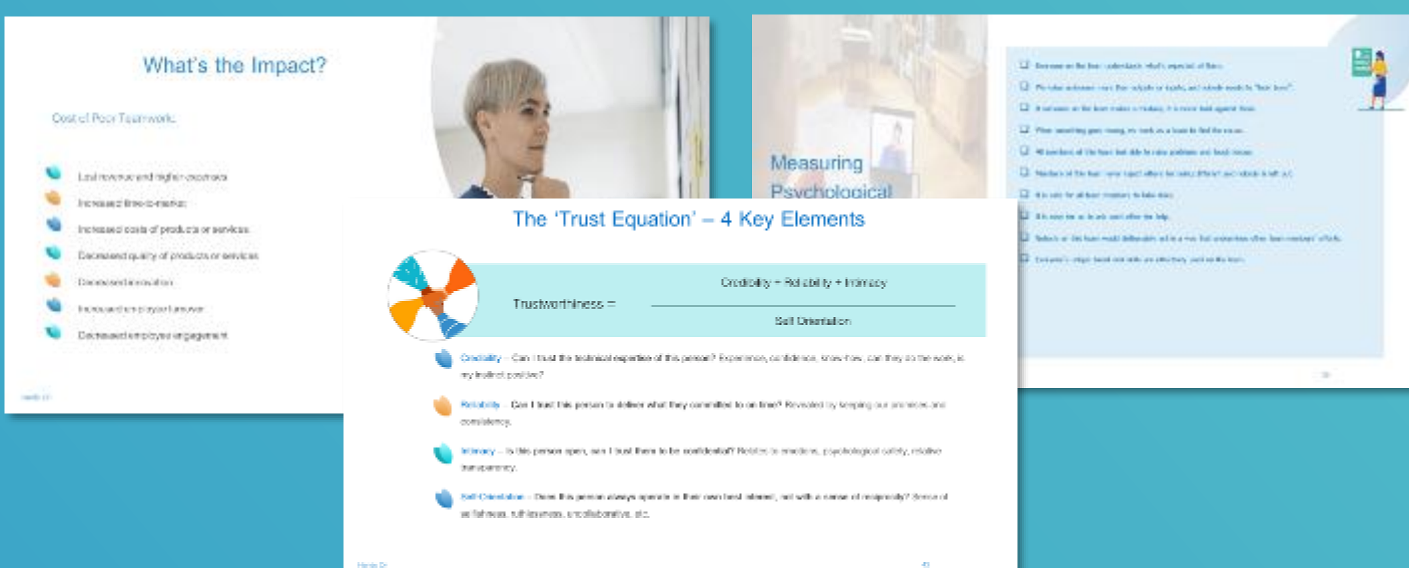

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The Neuroscience of Leadership

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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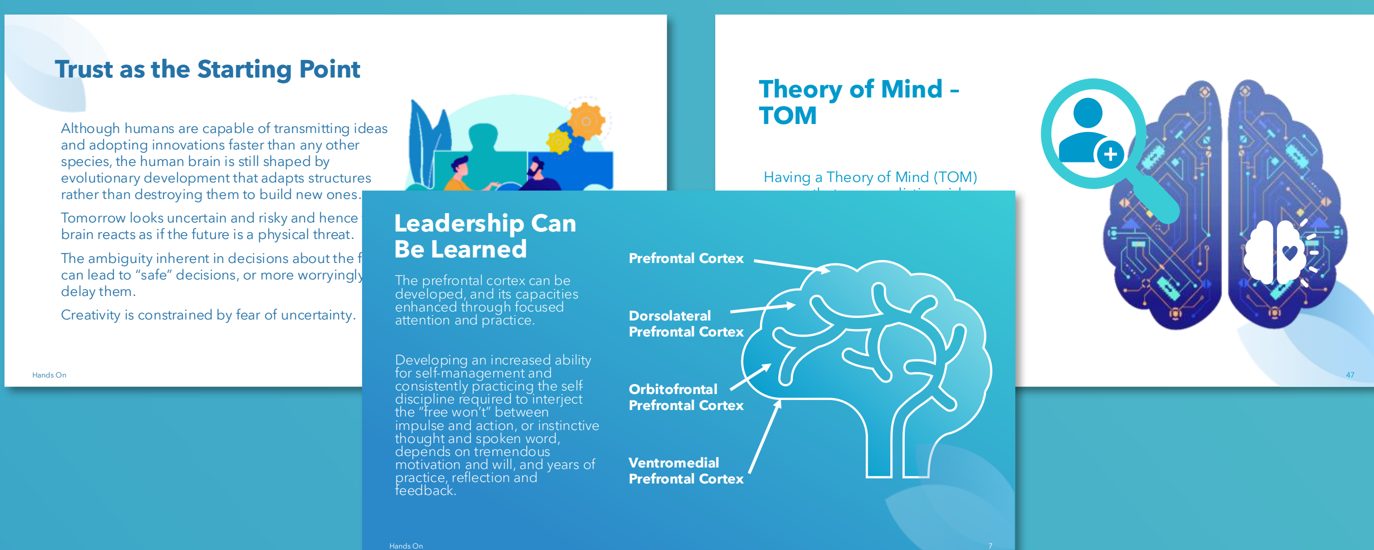

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Transitioning into Management

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.

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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.

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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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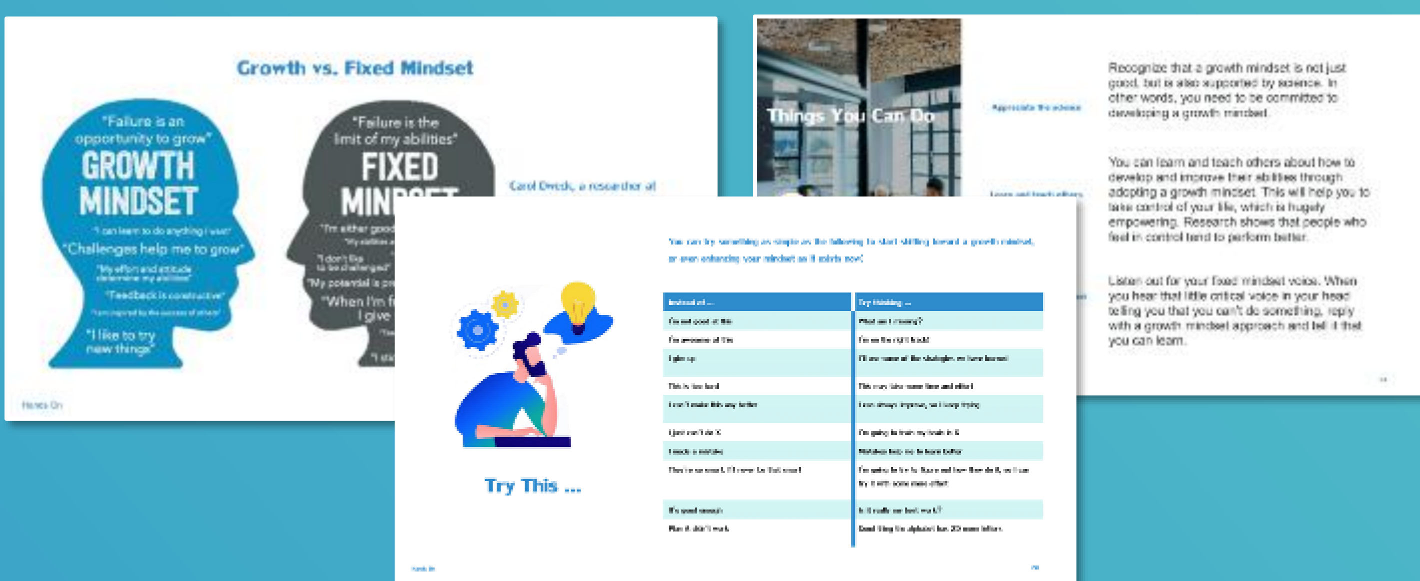

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Increasing Resiliency

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Managing Stress and Burnout & Using Learned Optimism

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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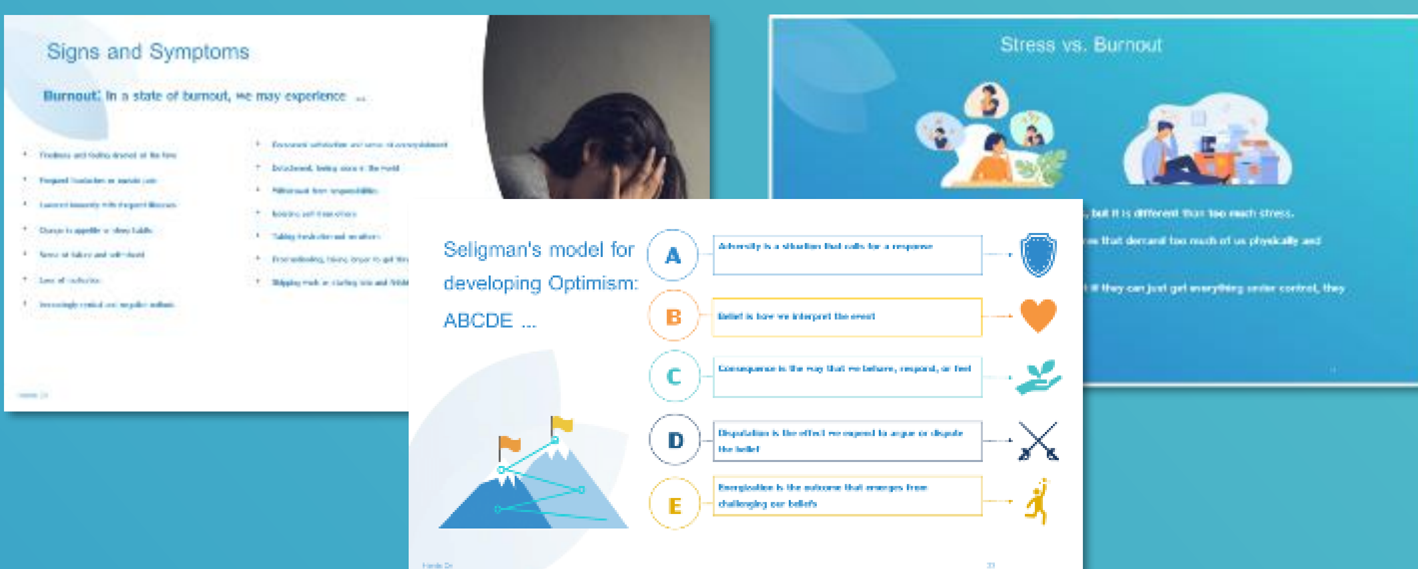

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Personal Branding

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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Clinical Operations

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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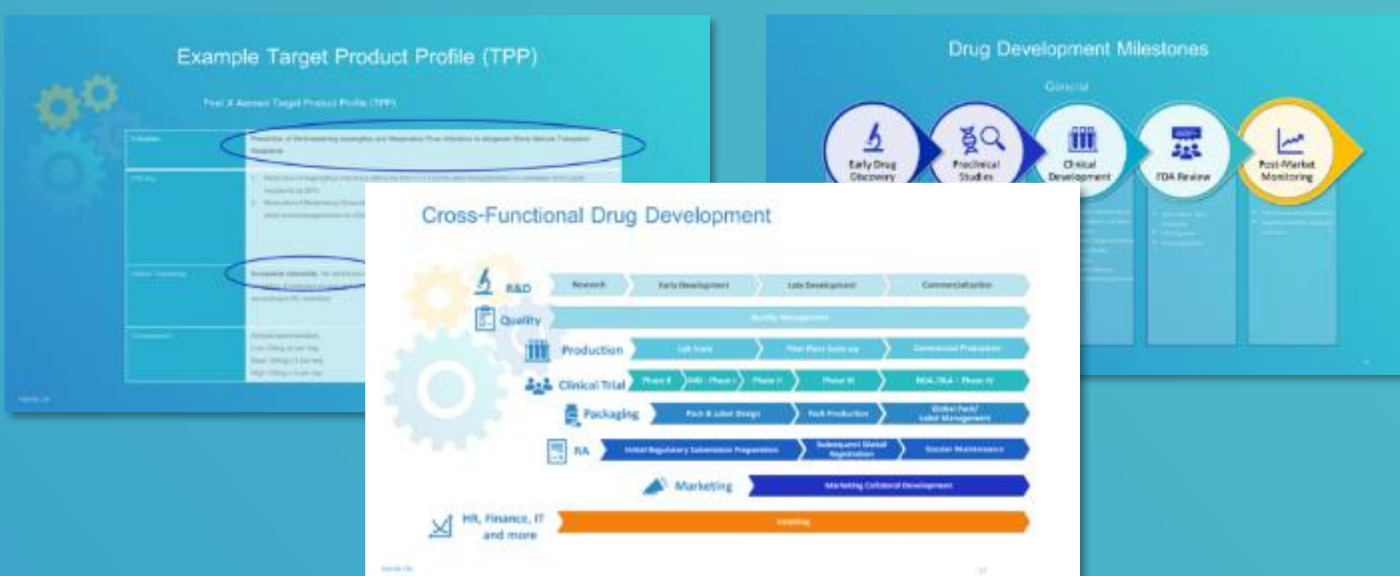

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Drug Discovery & Development 201

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.

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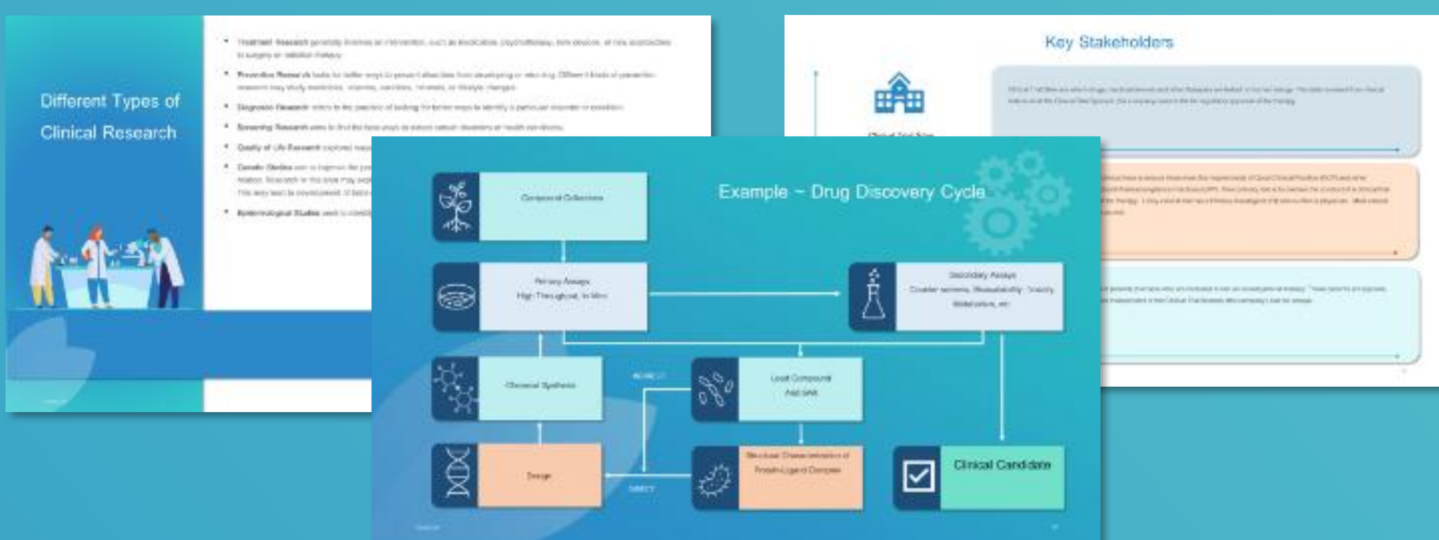

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Drug Safety

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.

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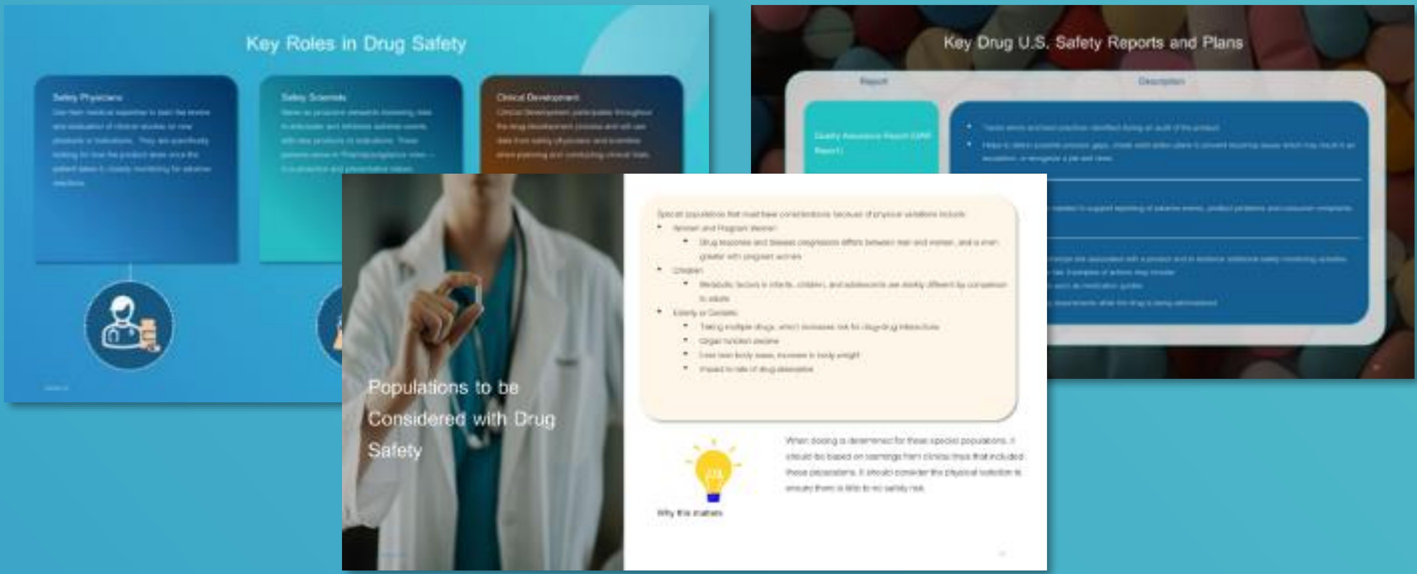

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GxP

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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Healthcare Compliance

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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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.

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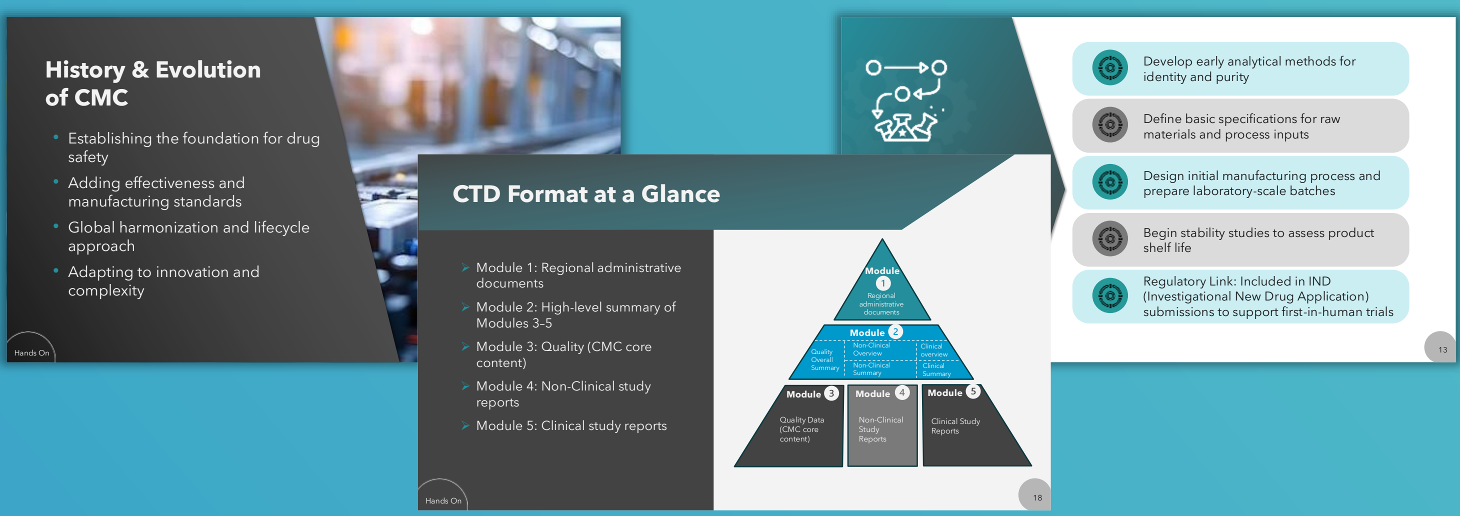

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Market Access

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
- Oher 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.

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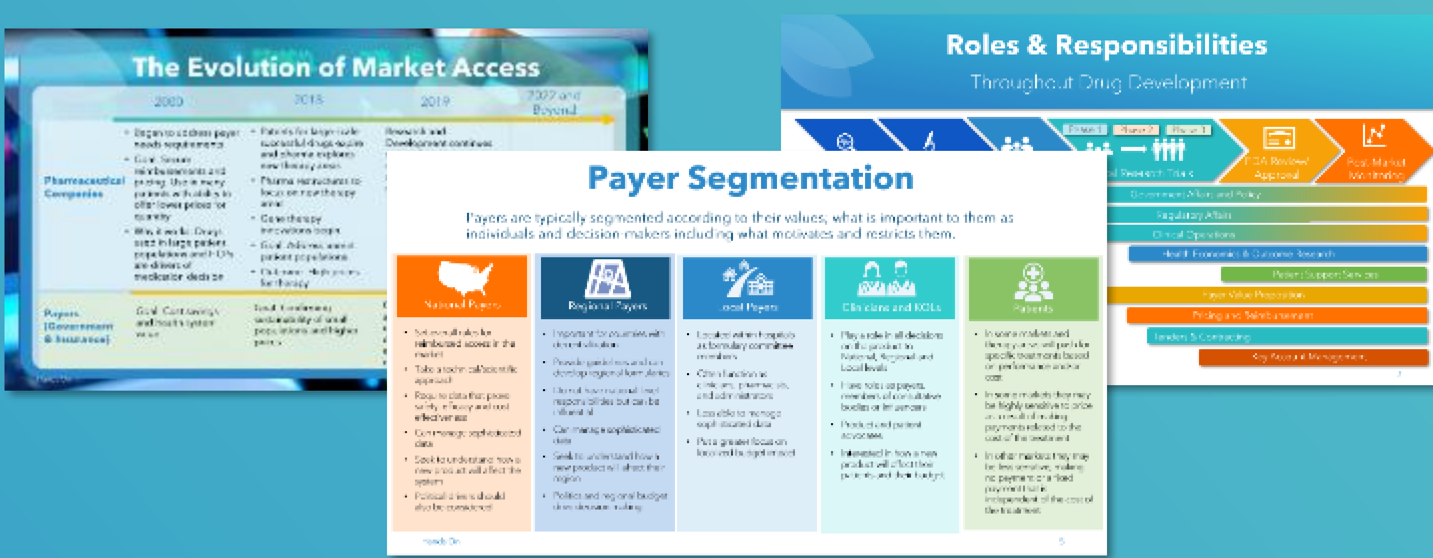

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Patient Centricity

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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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.

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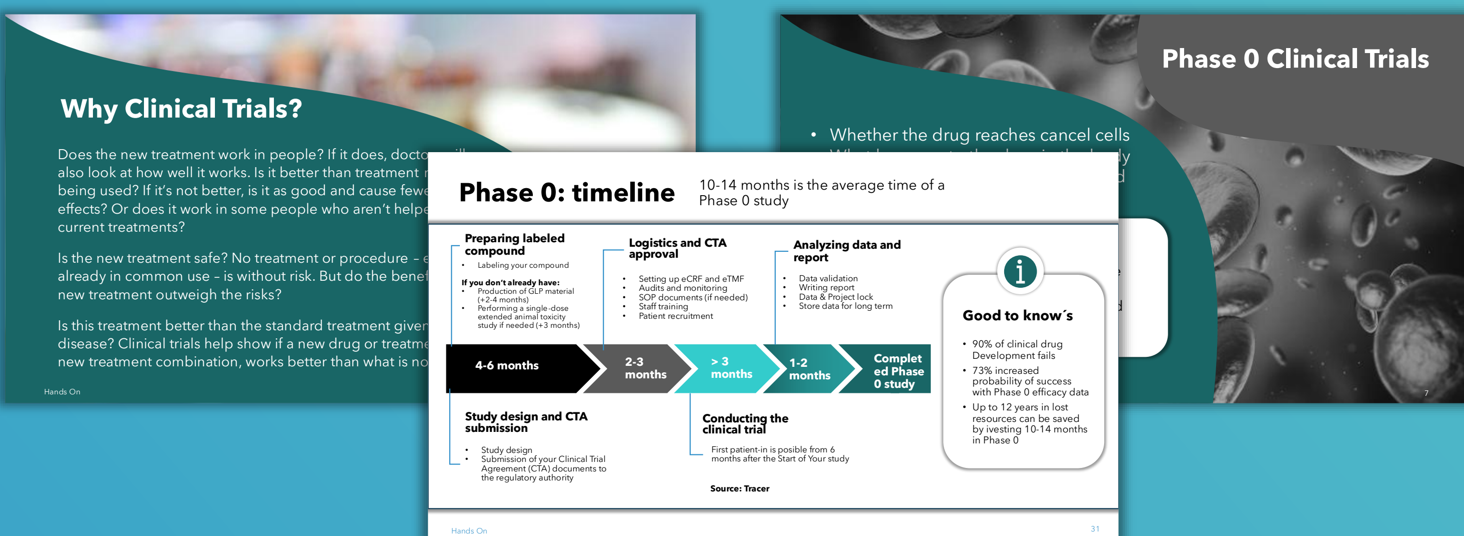

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Preparing for Commercialization

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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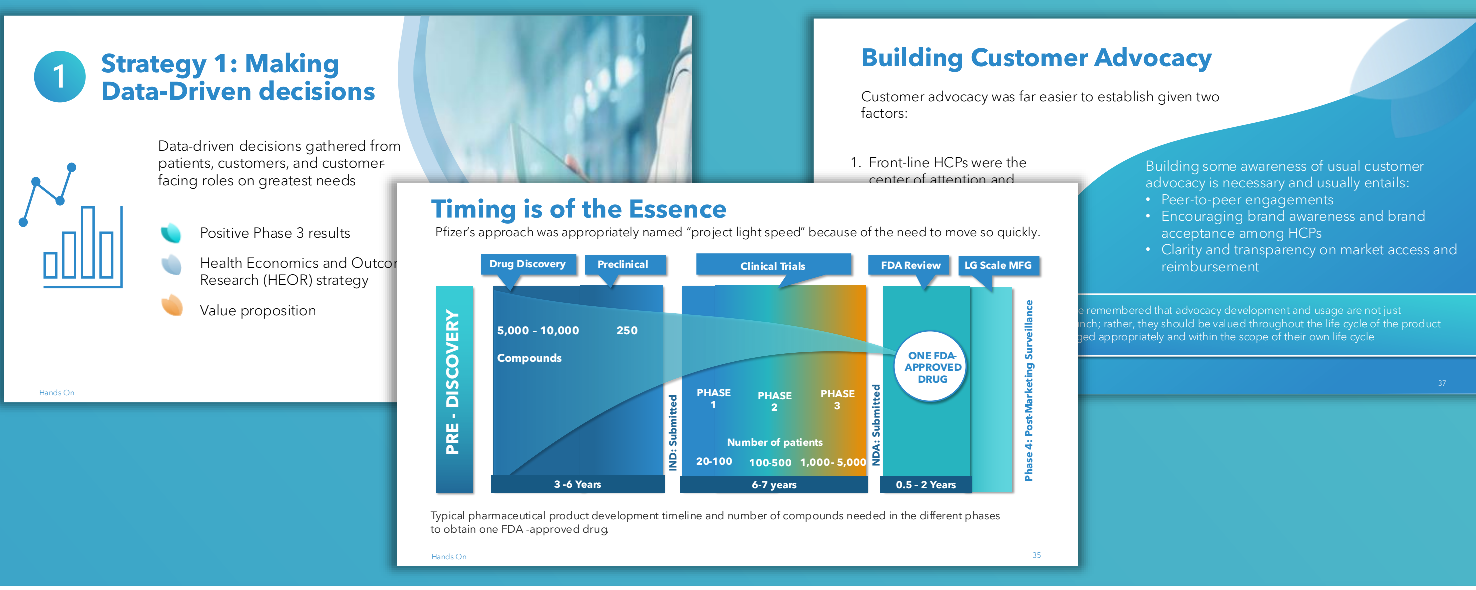

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Preparing for IND

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.

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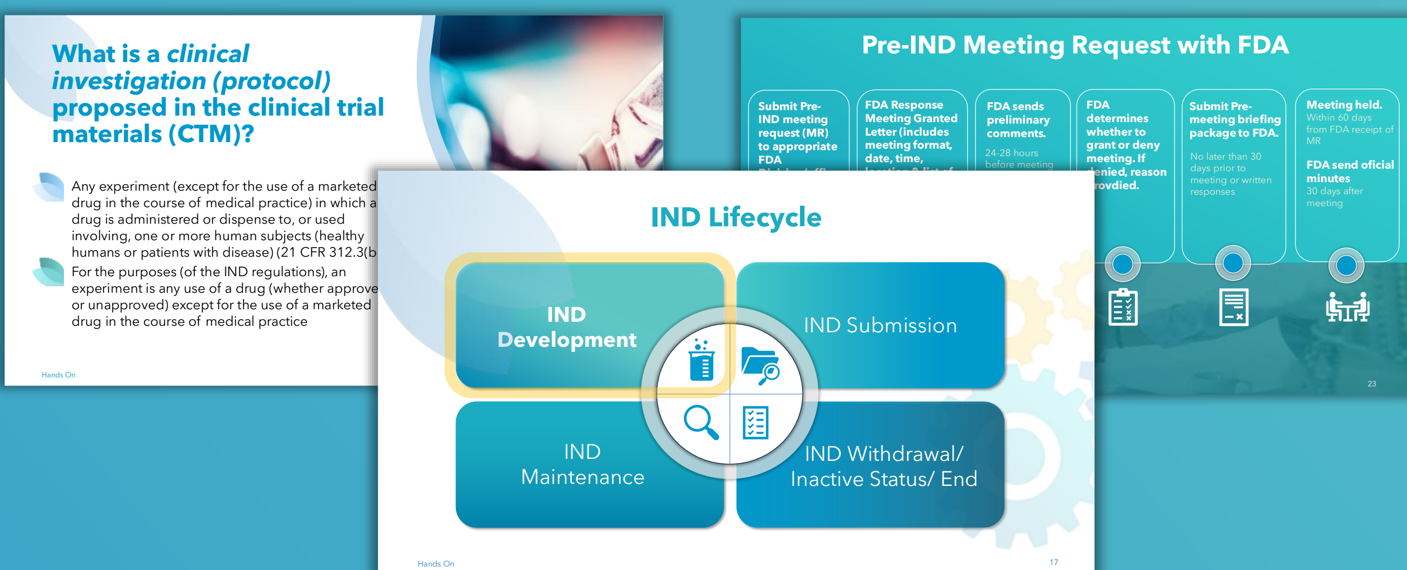

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Preparing for Phase 2

Overview

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

Learn about:

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

Key topics covered:

- Overview of Clinical Trial process
- Review of Phase 1 and 2 key elements
- Identification of Phase 1and 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.

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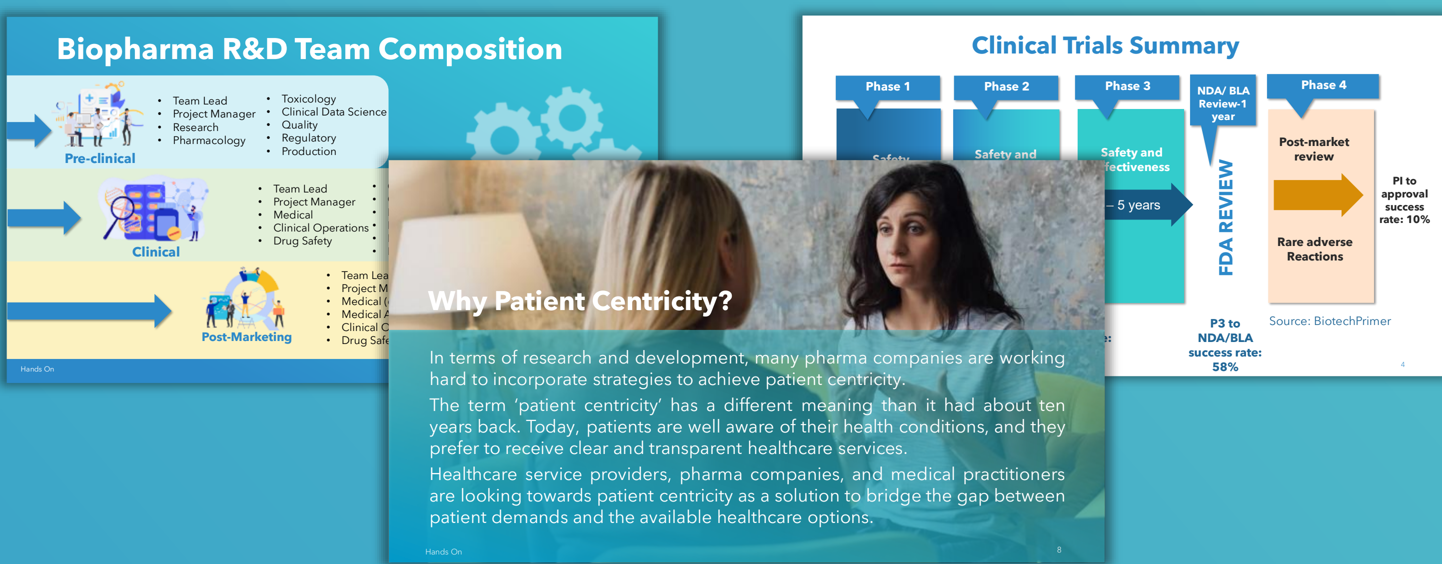

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Ramping-up to Phase 3

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.

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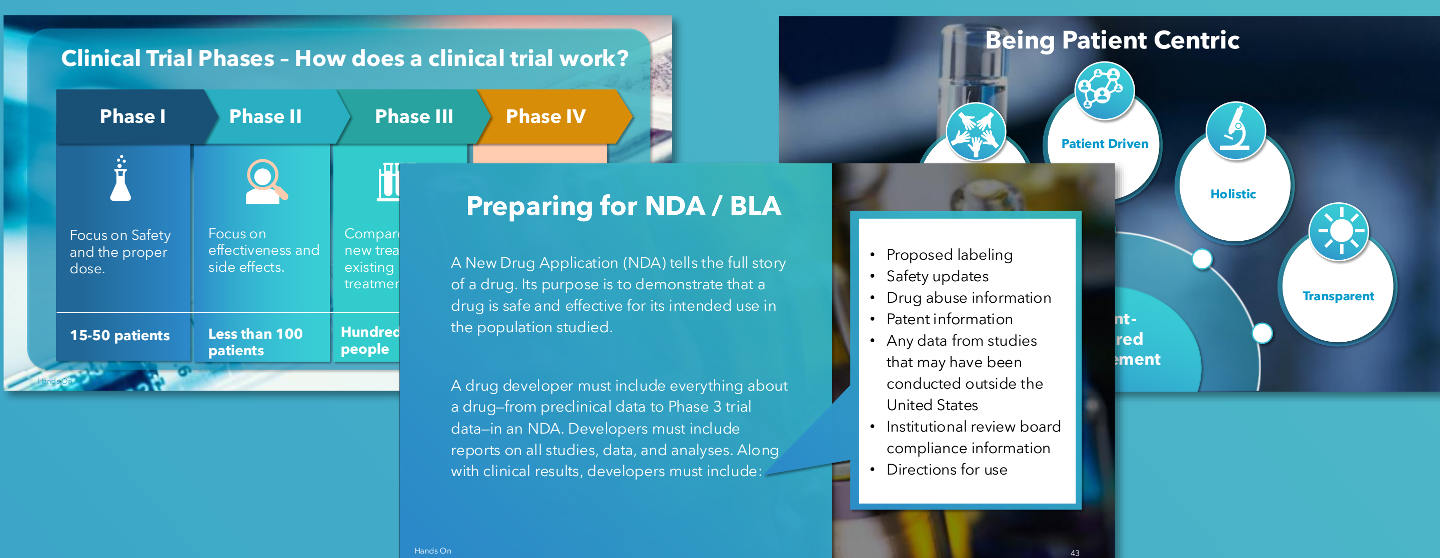

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Regulatory Affairs

Overview

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

Learn about:

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

Key topics covered:

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

Why this matters?

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

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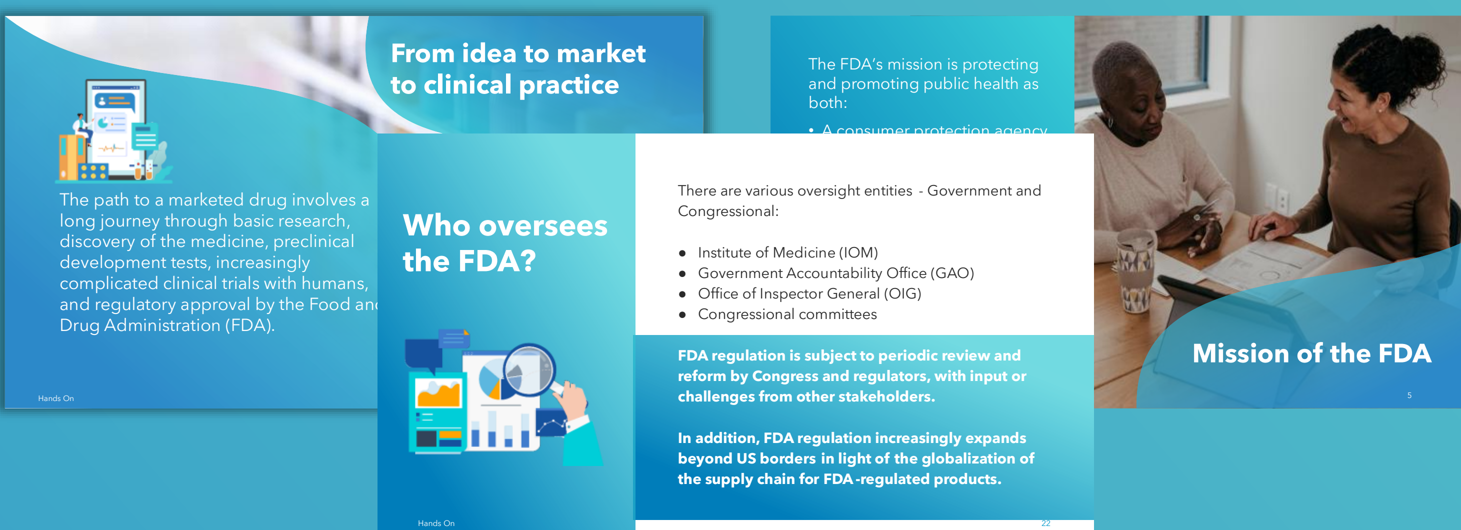

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Learning & Organizational Development

Transitioning into Industry

What?

Short, curated and targeted learning modules to help you best transition into industry, whether your prior experience was in academia, healthcare, or another non-industry field.

Why important?

This series will help you optimize **your early and ongoing successes** in your career in industry by helping you understand how to navigate a myriad of scenarios in industry that are likely different than what you've experienced in your prior roles.

This is also important to your organization, as this series will help you **lessen your learning curve** into industry, which will in turn **increase your early contributions** to your new organization and future organizations.

How?

This series will be **delivered by former life sciences business leaders** who themselves made the transition from academia into industry. While in industry, your facilitators held several cross-functional roles. Through expert facilitation and first-hand knowledge of the transition into industry, you will gain invaluable insights into what's different, what's expected of you, and lessons learned

Details / An Overview of Each Module

2.5 – 3-hour modules, delivered over 12 weeks for greater flexibility, with added benefit of increasing peer networks, learning through others, and establishing enduring network relationships.

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Modules and Key Learnings

Module #	Topic	Key Learning
1	**Welcome, Kick-Off Series, and Explore What's Different**	Understand what's different in industry and what's expected of you
2	**Business Acumen**	Understand the broader business landscape of the life sciences industry, different roles, stakeholders, influences, and evolutions
3	**Project Management**	Learn best practices and techniques for participating in and/or leading projects, since projects are the prevalent format in which work is done in industry
4	**Cross-functional Collaboration**	Learn about the different functions and their roles in the life sciences industry and best practices for working cross-functionally, since cross-functional work is the primary modality in which work is done in industry
5	**Influencing & Stakeholder Management**	Learn the importance of emotional intelligence, how to influence without authority, and ensure full engagement and alignment with stakeholders, since most work in industry is done within a matrix construct
6	**Effective Communications**	Learn best practice tips and techniques for structuring any communication within the work environment, as expectations for a more advanced level of communication skills are high in industry environments
7	**Presenting Technical Information**	Build on your learning from foundational communications by advancing your skills to synthesize and democratize voluminous technical information in a manner that your audience can assimilate and action
8	**Effective Meetings**	Learn how to structure your meetings, whether you're the meeting leader or participant, for maximum value and return on time invested, since you will spend a significant portion of your time in meetings
9	**Career Development**	This module is optional, but you may find it incredibly helpful in understanding how industry organizations typically view career development and growth, so that you can plan your industry career

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

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