

# BUSINESS SKILLS TRAINING COURSES



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Coaching and Mentoring for Improved Performance

High-Impact Communication

Critical Thinking and Problem Solving

Establishing a Business Mindset

Budget and Financial Management

Communicating Up

Taking Charge of Organisational Change

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STRATEGY  
EXECUTION™ 

AUTHORIZED RESELLER

# COACHING AND MENTORING FOR IMPROVED PERFORMANCE

3 DAYS

## COURSE OVERVIEW

Do you find yourself with too little time and with too few capable resources to do the work that needs to be done? Are resource or performance issues creating roadblocks or other's success? Imagine if you could apply proven techniques to assign work successfully and achieve the results you want— with the colleagues in the office, or around the world.

This course provides a powerful behavioural model to improve the quality, efficiency and effectiveness of coaching and mentoring with lasting results. Through practical exercises, group discussion and case studies, delegates will acquire the skills and tools to determine what work can be allocated and to whom, based on current performance levels. They will also learn how to assign the work with improved clarity and efficiency, establishing a strong foundation for success.

Participants will gain techniques for assigning work with the appropriate level of detail and guiding others' progress on the work assigned with suitable style and frequency, as well as how to evaluate results of the finished work and to provide focused feedback that helps improve or sustain performance in the future.

During class delegates will assess their own coaching style and learn how to leverage that style in order to deal more effectively with the challenging realities faced by coaches and managers in all types of organisations. There are also opportunities to assess and discuss real-life coaching issues in a practical, highly engaging and thought-provoking environment. Delegates will leave this course with a structured approach for improving the performance of others— and a cache of techniques to be a more effective coach and mentor.

## LEARN HOW TO

- ✓ Define the purpose of coaching and mentoring and its value to the organisation
- ✓ Apply the elements of the Coaching and Mentoring Model and improve coaching and mentoring skills
- ✓ Assess current performance and plan for better performance using coaching tools and techniques
- ✓ Select the appropriate approach to convey expectations
- ✓ Effectively monitor progress and provide the type and level of feedback required
- ✓ Handle difficult situations involving poor performance
- ✓ Evaluate results to improve performance continuously
- ✓ Explain the role of coaching and mentoring in the context of the Mindset Model

## COURSE TOPICS

### Define the Effective Coach

- Define coaching and mentoring
- What is coaching? What is mentoring?
- Coaching as a career choice
- Characteristics and critical skills of the effective coach
- Roles in coaching and mentoring
- Coaching relationships
- Coaching from a distance
- The impact of coaching
- Your purpose in coaching
- Supporting the four perspectives (strategic, operational, interpersonal, and personal) that comprise the Mindset Model

### The Coaching and Mentoring Model

- The Coaching and Mentoring Model
- The performance equation
- Performance levels
- Coaching styles
- Application to a mentoring relationship

### Determining Current Performance

- Establishing expectations
- Determining current performance levels
- Using effective questioning techniques to assess current performance levels
- The Coaching Planner
- Application within the mentoring relationship
- Current performance in the mindset model

### Defining and Assigning Work

- Defining and assigning work
- Selecting your coaching style
- Direct
- Advise
- Entrust
- Developing active listening skills
- Questions that prompt reflection
- Coachee consideration
- Determining the learning styles of the people you coach

- Structuring your information with TREOA (topic, recommendation, evidence, outcome, and action)
- Defining and assigning work in a distance coaching or mentoring situation

### Guiding Progress

- Guiding progress
- The coaching rule
- WIIFM (What's in it for me?), rewards, and performance
- Techniques in delivering focused feedback
- Guiding progress in a mentoring relationship

### Evaluating Results

- Evaluating results
- Measuring the effectiveness of the coaching
- Dealing with performance problems
- Preparing for an evaluation
- Evaluating results in a distance coaching and mentoring situation
- Complementary use of the mindset model and the coaching and mentoring model

## COURSE OVERVIEW

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Without communication skills, technical capabilities are not worth as much as they could be. Even the best ideas, strategies and work plans must be effectively communicated to have value. In our information-overloaded business world, being heard and getting what you need is more challenging than ever.

This course teaches techniques for creating high-impact, meaningful communication with co-workers, clients and stakeholders. Through practical exercises, group discussions and case studies, delegates will learn how to determine their own communication style, identify the communication styles of the audience and adapt the delivery accordingly. This course will provide hands-on practice in crafting persuasive messages, facilitating dialogue and making powerful communications. It will address common communication fallacies and ways to identify where a miscommunication has occurred. The course will also address issues related to communication in a virtual and global environment.

Attendees will walk away from the course firmly grounded in key communication techniques as well as possessing the additional tools necessary to apply these techniques to their work environment. They will also be able to implement standard communication planning processes to ensure that every communication is high-impact and well-structured.

## LEARN HOW TO

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- ✓ Identify your communication style
- ✓ Adapt your communication style to communicate with others
- ✓ Define the purpose, analyse the audience, create the content, and select the best medium to deliver a high-impact message
- ✓ Structure and deliver a persuasive oral or written communication
- ✓ Identify and apply advanced questioning and active listening techniques
- ✓ Improve skills for communication in small groups

## COURSE TOPICS

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### Communication Intelligence

- Communication
- High-impact communication
- Communication intelligence
- Communication model
- Communication filters
- Mindset model communication styles and forms

### Planning Your Message

- The communication model
- The communication planning process (purpose, audience, content, medium, structure, and delivery)
- Determining purpose and O/M/T—outcome, measurement, and time frame
- Audience considerations and analysis
- Content considerations
- Overcoming objections
- Dispelling misconceptions
- Determining medium

### Structuring Your Message

- Benefits of structure

- Structure model for organising content
- Opening
- Body
- Closing
- TREQA—
  - Topic
  - Recommendation
  - Evidence
  - Outcome
  - Action
- Supporting evidence
- Clear writing and speaking
- Storytelling and high-impact techniques
- Visual aids
- Strong closings
- Appealing to different learning styles (visual, auditory, kinesthetic predicates)

### Delivering Your Message

- High-impact communication checklist
- First impressions
- Stage fright
- Body language and voice

- Handling audiences reactions
- Q-and-A sessions
- Constructive feedback

### High-Impact Meetings

- Senders and receivers in small groups
- Business meetings
- Elements of high-impact meetings
- Experience
- Process
- Productivity
- Communication styles in meetings
- Building trust
- Empathy
- Active listening
- Question types (open vs. closed and leading vs. proving questions)
- Dialogue (four building blocks and video)
- Principles of effective meetings
- Meeting facilitation
- Measuring results

# CRITICAL THINKING AND PROBLEM SOLVING

3 DAYS

## COURSE OVERVIEW

This course presents a structured approach for tackling problems, opportunities and decisions that will ultimately help achieve better results—whether innovating, managing crises or planning for the future. The course addresses the five types of critical thinking needed in business environments: strategic thinking, tactical thinking, analytical thinking, innovative thinking and implicative thinking.

Through exercises, delegates will practice using these different thinking approaches to achieve maximum results. They will also have the opportunity to apply these concepts to a specific problem or opportunity from their own business environment, share newly learned approaches with classmates and give and receive feedback on those approaches. It also teaches a proven five-step process for responding to business problems and opportunities.

## LEARN HOW TO

- ✓ Leverage current theories on human thought to improve your performance and that of your team members.
- ✓ Discriminate between the different types of critical thinking styles, and determine when to use each type in the business environment.
- ✓ Uncover business problems and opportunities and learn how to address them (analyse their root causes).
- ✓ Assess the internal and external environmental factors surrounding business problems and opportunities.
- ✓ Explore a wide range of potential responses to a business problem or opportunity.
- ✓ Evaluate potential responses to a business problem or opportunity to determine the best response.
- ✓ Persuade stakeholders to support the best response, design an action plan for implementing the best response, and successfully execute the action plan.
- ✓ Use the Problem/Opportunity Response Process to address a problem or opportunity in your business environment.

## COURSE TOPICS

### The Science of Thought

- The human brain
- Information Processing Model
- Elements of information processing

### The Critical Thinking Model

- Critical Thinking Styles Instrument (CTSI) (self-assessment)
- The Critical Thinking Model
- Problem/Opportunity Response Process

### Problem/Opportunity Identification and Analysis

- Types of critical thinking used (Analytic, Strategic, Tactical)
- Problem/opportunity identification
- Active vs. passive identification
- “AS-IS” vs. “TO-BE”
- Tools and techniques for identifying problems and opportunities
- Root cause analysis
- Tools and techniques for root cause analysis

### Environmental Scan

- Types of critical thinking used (Analytic, Strategic)
- Define environmental scan
- Internal scan
- External scan
- Stakeholder scan

### Response Exploration

- Type of critical thinking used (Innovative thinking)
- Tools and techniques for exploring responses
- SCAMPER\*
- S = Substitute
- C = Combine
- A = Adapt
- M = Magnify & modify
- P = Put to other uses
- E = Eliminate
- R = Rearrange and reverse
- Other innovative thinking approaches

### Response Selection

- Types of critical thinking used (Analytical, Implicative)
- Filtering
- Clustering and voting
- Capability and business value
- Response prioritisation matrix
- Decision tree
- Implications analysis
- Implications diagramming

### Response Implementation

- Types of critical thinking used (strategic, tactical)
- Communicating Strategically
- Continuum of agreement
- Managing expectations
- Implementing tactically
- Ensuring ownership and commitment
- Monitoring, controlling, and marketing

### Putting It to Work

# ESTABLISHING A BUSINESS MINDSET

3 DAYS

## COURSE OVERVIEW

This course sets the stage for maximising the performance of technical professionals by incorporating different business perspectives into their experience. Participants will learn to leverage variables related to the business environment, business thinking, business interactions, and business outcomes. They will have the opportunity to practice analysing business situations and applying their new skills to common business issues. They will also become familiar with best practices in business etiquette, communications, and financial management.

## LEARN HOW TO

- ✓ Describe and apply a business mindset
- ✓ Gain insight into your organisation's big picture
- ✓ Apply a strategic perspective to improve daily performance
- ✓ Use the Operational Framework to progress toward or achieve a goal
- ✓ Use interpersonal skills to contribute to strategic and operational success
- ✓ Assess the personal strengths you need to benefit your organisation and your career
- ✓ Use the Mindset Model and tools to enhance business success and personal career growth

## COURSE TOPICS

### The Mindset Model

- Business success
- Business mindset
- Perspectives and responsibilities
- Strategic perspective
- Operational perspective
- Interpersonal perspective
- Personal perspective
- Influences within the mindset model
- Powering the mindset model
- Critical thinking
- High-impact communication
- Intent, actions, and outcomes
- Personalising the mindset model
- Performance appraisals vs. professional development
- The competency structure
- The process of professional development
- Planning for professional development
- Developing core competencies

### The Strategic Perspective

- Strategic perspective
- Vision, mission, and strategy
- Layers of strategy
- How to base your goals on strategy
- Identify existing strategies
- Primary strategic influences
- Who are your stakeholders?
- Identify stakeholders
- Prioritise stakeholder's power and interest
- Plot stakeholders on power/interest matrix
- Impact of influences
- Conduct a force-field analysis of driving and restraining forces

- How to conduct a force-field analysis
- Identify potential responses
- Create and validate goals
- Well-written goals and objectives (SMART)
- Conduct a SWOT analysis
- The SWOT grid
- SWOT analysis: considerations
- Revisit and confirm alignment
- Personalising the strategic perspective

### Operational Perspective

- The operational framework
- Products and services
- Human resources/training
- Marketing/sales
- Customer service
- Supply chain management
- Finance/budgeting
- Organisational change and the basic change process
- Change considerations (people, processes, and technology)
- Gap analysis
- Personalising the operational perspective

### Interpersonal Perspectives

- High-impact communication
- How others perceive your communications
- The communication model: fundamental elements
- Barriers to communication: filters
- Structuring communication: TREOA™
- TREOA™ and virtual communication
- Active listening
- Coaching and mentoring

- Coaching for improved performance
- Mentoring for career development
- Giving and receiving feedback
- Best practices in effective feedback
- Effective teams
- Leading vs. managing
- The teaming model
- Building effective virtual teams
- Diversity on teams
- Impact of stress and conflict
- Conflict in global or virtual teams
- Conflict (traditional vs. contemporary view)
- Five modes of managing conflict
- Personalising the interpersonal perspective

### Personal Perspective

- The organizational environment
- Organisational culture
- Organisational politics
- Business etiquette
- Cultural challenges
- Linguistic considerations
- Social etiquette
- Gender, ethnicity, and class roles
- Critical thinking to increase impact
- Styles of critical thinking
- Self-assessment: which career track is for you?
- The personal perspective: navigating your future

# BUDGET AND FINANCIAL MANAGEMENT

3 DAYS

## COURSE OVERVIEW

In a global business environment, employees are increasingly tasked with responsibilities outside of their traditional job roles. Finance is the fastest growing area in which senior managers are looking to department staff and leaders for insight, understanding and recommendations. Without understanding the fundamental links between budgets and finance, many struggle to show senior managers how their projects or departments contribute to the organisation's bottom line.

This course will help delegates understand the context and trends of finance—as well as the mechanics of developing budgets. It will provide the necessary tools to make sound financial decisions for a business unit, using real exercises to achieve familiarity with standard financial documents as well as using budget and estimating methods and tools more effectively. Specifically, by reviewing and discussing commonly used financial metrics to not only understand the numbers, but also to explore the not-so-obvious financial impacts of typical operating decisions and actions—from a project to organisational level.

After completing this course, delegates will know how to gather, compile and prioritise financial data in order to develop, execute and manage a budget. They will also be better able to communicate financial and budgetary information, have greater confidence in assessing finances and participate more effectively in the business decision-making process.

## LEARN HOW TO

- ✓ Teach the basics of finance and budgeting, which you can use to assist your organisation in making better business decisions
- ✓ Provide tools to allow you to be an informed user of financial information
- ✓ Provide tools to enable you to create better budgets
- ✓ Increase your comfort with planning, discussing, and managing budgets and other financial information
- ✓ Identify tools that you can use to negotiate persuasively for the financial resources that you need to accomplish your work
- ✓ Present finance in a way that will increase your confidence in reviewing financial information
- ✓ Make you proficient at accounting or even financial accounting
- ✓ Teach you everything you need to know to be a finance manager or financial advisor
- ✓ Prepare you to make decisions about retirement, stock markets, stocks or bonds, or your financial future

## COURSE TOPICS

### Strategic Focus and Drivers

- Financial management
- Defining: cost, expenses, income, cash
- Accounting, budgeting, and estimating
- Change management
- How budgeting, accounting, and financial techniques impact professionals
- Business trends:
- Recombination
- Aggressive asset management
- Outsourcing
- Enforcing accountability (sarbanes-oxley act of 2002)
- Focus on strategy
- Swot analysis
- The balanced scorecard

### Managing Stakeholder Expectations

- Mindset model insights
- Stakeholders:
- Define
- Identify
- Analyse
- Prioritise
- Using stakeholder information

### Accounting for Results: The Basics of Finance

- The cash flow cycle
- Types of accounting
- Direct vs. Indirect costs
- Other types of costs
- Levels of profit
- Financial statements
- Typical revenue and income factors and categories
- Comparing income statements
- Depreciation
- Income statement ratios
- Balance sheets (assets, liabilities, net worth, profitability ratios)
- Cash flow

### Planning: Budgeting Skills

- Budget: definition and elements
- Business budgeting model (planning, approving, reporting, and managing budget)
- Planning process
- Gathering budget information
- Prioritising elements (including impact analysis)
- Develop initial estimates (forecasting,

types of estimates, pert, three-point, payback period, break-even analysis, net present value, cba or roi)

- Compile and total estimates
- Refine budget and perform tradeoffs
- Finalise initial budget for approval (including audits)

### Approving: Presenting the Budget

- Communicating effectively
- Communication model
- Communication planning process
- Treoa™
- Budget presentation and negotiation tips
- Budget negotiation, part 1
- Budget negotiation, part 2

### Managing and Reporting: Improving Financial Results

- Managing the budget
- Earned value terminology and interpretation
- Variance
- Reporting
- Budget best practices

# COMMUNICATING UP: WINNING STRATEGIES FOR SUCCESSFUL EXECUTIVE CONVERSATIONS

2 DAYS

## COURSE OVERVIEW

Getting face time with executives in order to get a message across quickly, in a clear, concise and direct manner can be challenging. Because of this it is crucial that each conversation is professional and effective. This course helps delegates practice and perfect demonstrated strategies and techniques for communicating effectively with top-level and senior executives.

This course focuses on what executives really care about in order to tailor messages and prepare for executive conversations, including those that are unplanned. Delegates will be able to recognise communication techniques that executives commonly use, react to them; practice active listening and get messages across quickly; understand how to earn and maintain trust; learn to demonstrate the value they can offer and use techniques of persuasion appropriately. They will also learn tips and strategies for how to successfully navigate difficult conversations, such as communicating bad news and practice techniques for regaining and maintaining trust when faced with conflict, while convincing the executive that collaboration is the key to a successful engagement and deliverable.

In this course, delegates will review foundational knowledge before class in an online setting and spend most of the class time practicing and applying these techniques to real-world scenarios—including their own—in a series of discussions and role-play exercises.

**Pre-work:** Delegates will need to download, complete and bring to class their participant guide, completed pre-work assignments (1-2 hours to complete) and a laptop or other device.

## LEARN HOW TO

- ✓ Plan for successful communications with executives, by identifying and tailoring conversations to the executive's communication style and motivations
- ✓ Use an executive oriented mindset, content, language, and style when communicating with executives
- ✓ Be prepared for impromptu communications with executives
- ✓ Compose a situation-appropriate message to an executive—whether written or spoken
- ✓ Establish rapport, and build and maintain the executive's trust in order to persuade and influence decisions
- ✓ Persuade and influence executive decisions by building and maintaining a trusting relationship
- ✓ Apply a structured approach to navigating difficult conversations, such as—
  - Delivering bad news
  - Asking for more time/money/resources
  - Persuading an executive that has strongly held opinions (the non-supporter)

## COURSE TOPICS

### The Importance of Awareness

- Executive communication styles
- Five types of awareness
- Emotional intelligence
- The mindset model
- Business model canvas

### What Motivates Executives?

- What motivates executives?
- What do executives expect?
- Executive pain points

### High-Impact Communication Techniques

- Understand your purpose for communicating
- A high-impact approach for standard communications
- A skillset for high-impact communications
- Tips for high-impact communications
- Difficult communications
- Dealing with tough tactics

### Executive Stature and Leadership Presence

- Sources of Power
- Executive stature and demeanor
- Collaborating with executives
- Persuasion and influence
- Recognising and countering manipulative techniques
- Stature and leadership presence

### Building Relationships and Communicating Through Trust

- Delivering as promised
- Trust migration
- The trust-building process
- Special challenges to build executive trust
- Controlling risk to build trust
- Focus on risk opportunities—not just threats

### Communication Exercises

- The One-On-One conversation
- Impromptu conversation
- Difficult conversations: delivering bad news
- Making your case: communicating in writing
- Presenting to the executive committee



# TAKING CHARGE OF ORGANISATIONAL CHANGE

3 DAYS

## COURSE OVERVIEW

This course introduces a framework and process for implementing and managing organisational change, from identifying the changes, through planning, and into implementation. This course is designed to provide participants with opportunities to apply their knowledge and skills and to try out new techniques in a realistic case study addressing organisational change. Participants will have the opportunity to apply core concepts to a specific problem or opportunity from their own business environment.

## LEARN HOW TO

- ✓ Assist in implementing organisational change initiatives
- ✓ Use a change-leadership framework to implement sustainable change in your organisation
- ✓ Identify roles in the change process
- ✓ Assess the implications of change on—
- ✓ Leadership
- ✓ Organisational development
- ✓ Individuals
- ✓ Help others to adapt and adjust to organisational change
- ✓ Overcome resistance using techniques to facilitate transition through change

## COURSE TOPICS

### Defining Change

- Define organisational change
- Identify effects and responses to change
- Discuss responses to change including resistance
- The framework for change model

### Your Role as Change Agent

- Communication styles
- Strengths and trouble spots
- Champions of change
- Critical roles in the change process
- Power vs. Time commitment of change roles
- The framework for change
- Resistance: characteristics and implications
- For employees, change stress = death
- Change management: a balancing act
- Where do you fit in the change process?
- Plot stakeholders on a power/interest matrix
- Process of stakeholder analysis
- Stakeholder classifications/ranking

### Identifying the Need for Organisational Change

- Leveraging problem/opportunity
- The framework for change
- Fundamental approaches to change
- Compelling reasons for change
- Building a bridge to sustainable change
- As-is: the present state
- Analysis of the as-is state: types of research
- Stakeholder research based on prioritization

- Stakeholder engagement – data collection
- Research using the operational framework
- Products and services | human resources/training
- Marketing/sales | customer service
- Supply chain | finance/budgeting
- What metrics could you assess for the remaining 3 perspectives
- To-be: the desired future state
- Case for change template overview
- The bridge: framework for change
- Case for change template overview

### Engaging Support: Leadership, Vision, and Communication

- Framework for change
- Idea generation with stakeholders
- List compelling reasons for organisational change
- Leading a facilitated meeting
- Brainstorming
- Crawford slip
- Building blocks of dialog
- Active listening
- Selection process for idea generation
- Case for change template

### Engaging Support: Communicating the Vision and Pathway Forward

- Framework for change
- Linkage to the mindset model
- Formula for change
- Compelling vision for change
- Examples of vision statements
- Choosing a strategy for change
- Measures and mileposts

- Communication planning process
- What people want to know
- Planning the change
- Engaging stakeholder support
- Plan your change management communication strategy
- Communicating strategically
- Case for change template overview

### Implementing the Change and Supporting Transition

- The bridge: measuring progress and making adjustments along the way
- W. Edwards deming's philosophy
- The model for improvement: (plan-do-study-act cycle)
- Inform your improvement
- Impact of failure to address organisational alignment
- Leader's focus: change and transition
- Leader's responsibilities for transition
- Tips for coaching and supporting transition
- Obstacles and barriers to sustainable change
- Common obstacles to change
- Common barriers to change (continued)
- Tips for addressing obstacles to change
- Tips for addressing obstacles to change (continued)
- Tips for successful implementation
- Case for change template overview

### Putting It to Work











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