



Compass Business Solutions, Inc.

Training Index

About Compass Training Sessions:

This Training Index is a representative list of the frequently requested Compass sessions. It is not an exhaustive list. Please contact us for a specific session if it is not listed here.

Each session lists recommended key topics. These can be adjusted to meet your specific needs and/or expanded or reduced in a particular area. Every Compass session is customized to our clients, in particular with case studies, discussion points, examples, etc. Depending on your organization and culture, we can also incorporate experiential exercises to the process.

Each session can also be customized to the participants in terms of complexity and application. We can adjust the content for application to entry-level employees to executive staff.

Compass sessions are very interactive and we use a wide variety of methods to engage every individual and ensure that each person learns from the training. We are well-versed in adult learning (andragogy) and Instructional Systems Design and understand the importance of translating theory into practical application.

Most of the listed sessions are presented as four (4) hour sessions but can be adjusted and customized to target specific learning objectives of the participants for less or more in-depth sessions. Those marked with an * are designed as full-day sessions for smaller audiences due to the nature of the topic and requirements for greater participant actions but can also be adjusted as needed.

We look forward to talking with you about Compass training at your organization!

| COURSE TITLE | PAGE |
|---|-----------|
| LEADERSHIP (All levels of management) | 3 |
| 1 Compensation: Effective Compensation Management | 3 |
| 2 Culture: Building a Culture of Challenge and Growth | 3 |
| 3 Difficult Employees: Employee Turnaround or Turn 'em Out | 3 |
| 4 Leadership: Transition to Management* | 4 |
| 5 Motivation: Theories and Tools | 4 |
| 6 New Leader Assimilation: Transitioning to a New Leader | 4 |
| 7 Strategy: Steps to Plan, Act and Achieve Results* | 4 |
| TALENT MANAGEMENT (All levels of supervision/management) | 5 |
| 8 Diversity: Managing a Diverse Workforce | 5 |
| 9 Employee Relations: Optimizing Manager-Employee Relations | 5 |
| 10 HIPOs: Recruiting & Selecting High Performers | 5 |
| 11 Interviewing: Hire the Best* | 6 |
| 12 Performance Management: Maximizing Employee Performance* | 6 |
| 13 Talent: Identifying & Retaining Key Talent | 6 |
| 14 Team: Developing High Performing Teams | 7 |
| INTERPERSONAL SKILLS (All levels) | 7 |
| 15 Assertiveness: Power, Polish and Poise | 7 |
| 16 Communications: Communications in the Workplace | 7 |
| 17 Conflict: Managing Conflict Effectively | 8 |
| 18 DiSC: Behavior Awareness and Management | 8 |
| 19 Problem-Solving & Decision-Making (PSDM) | 8 |
| EMPLOYEE DEVELOPMENT (All levels) | 9 |
| 20 Change: Managing Change | 9 |
| 21 Creativity: Firm Foundations and Open Windows | 9 |
| 22 Legal Issues: Managing within Legal Parameters | 9 |
| 23 Presenting: Effective Presentation Skills* | 10 |
| 24 Professionalism/Etiquette: Professional Presence: Raising the Bar* | 10 |
| 25 Project: Project Management | 10 |
| 26 Project: Advanced Project Management* | 11 |
| 27 Public Speaking: Butterflies in Formation | 11 |
| 28 Training: OJT | 11 |
| 29 Training: Skilled Facilitation (Train-the-Trainer) | 11 |
| 30 Writing: Business Writing Success | 12 |
| CUSTOMER-FOCUSED | 12 |
| 31 Customer Culture: Building a Customer-Focused Culture | 12 |
| 32 Tuning in to Your Customers | 12 |
| 33 Networking Know-How | 13 |
| 34 Selling: Competitive Selling Skills | 13 |
| 35 Selling: Consultative Selling Skills | 13 |
| 36 Service: Excellence in Customer Service | 14 |
| WORKPLACE SUPPORT | 14 |
| 37 Employee Transition and Outplacement | 14 |
| 38 Fitness for Duty: Awareness, Management of, and Responsibility | 14 |
| 39 Harassment: Harassment and Discrimination Prevention/Investigation | 14 |
| 40 How to Complete, Manage and Store Your I-9s | 15 |
| 41 Meeting Management | 15 |
| 42 Safety: Safety NOW | 15 |
| 43 Stress: Stress Management | 16 |
| 44 Time Management: Managing Your Clock | 16 |
| 45 Union Avoidance: Managing to a Positive Culture | 16 |
| LEADERSHIP SERIES EXAMPLE | 17 |

Leadership: All Levels

1. **Compensation: Effective Compensation Management**

Topics include:

- The role of compensation in today's business
- The different components of total compensation, and the purposes of each
- Understanding your company's compensation philosophy
- Using compensation to drive results
- The limitations - things compensation can't fix
- Individual compensation decisions including - equity, promotions, demotions
- Compensation landmines, and how to avoid them
- Communicating your decisions to the individuals
- Dealing with leaks, counter offers and other nuances

2. **Culture: Building a Culture of Challenge and Growth**

Topics include:

- Defining and becoming an Employer of Choice
- Developing your "employment brand" and EVP
- Employee engagement vs. employee satisfaction
- Defining and communicating the different dimensions of employee growth
- The role of performance management in growing your talent
- Career planning and individual development plans (IDP)
- Succession planning - the business case and how to do it
- Addressing soft and hard skills in employee challenge and growth
- About tests and assessments - what's so good and not so good
- Addressing the negative; rewarding the positive

3. **Difficult Employees: Employee Turnaround or Turn 'em Out: Corrective Actions, Up To and Including Termination**

Topics include:

- Establish and communicate performance expectations
- Improve employee performance using contemporary coaching techniques
- Create a performance action plan using the ACHIEVE Model for Change
- Recognize and reward positive performance (novel, rewarding behaviors)
- Incorporate best practices for positive discipline into the workplace
- Documentation and avoiding legal repercussions
- The legalities of the disciplinary process

4. **Leadership: Transition to Management**

Topics include:

- Constants of the effective leader
- Professionalism defined
- Managing prior co-workers and friends
- Ten rookie mistakes
- How things have changed . . .
- Managing personal relationships
- The importance of SMART objectives
- What you need to know
- Managing your manager (upward management)
- Trends in business

5. **Motivation: Theories and Tools**

Topics include:

- Why we study motivation
- What it is and what it isn't
- Limits of motivation in the performance cycle
- Maslow's Theory
- Thematic Apperception Test (self-assessment tool)
- Frederick Herzberg's Two-Factor Theory
- Equity Theory
- Defining your motivational environment
- Creating your department's motivational environment
- Personal inventory

6. **New Leader Assimilation: Transitioning to a New Leader**

Topics include:

- The process (explained to both the New Leader and the Team - separately)
- Team meeting and questions development
- Private 1:1 with the new leader
- The leader responds to the team
- Debrief to the leader
- Debrief to the team

Note: this session may be presented over a two-day process

7. **Strategy: Steps to Plan, Act, and Achieve Results**

Topics include:

- Key components of a Strategic Plan
- Why Vision, Mission and Values statements
- Brainstorming at the C level
- Vision, Mission and Values statements
- SWOT analysis
- SWOT analysis case study and application
- SMART goals cascaded through the organization
- Format for one- and three-year plans
- Individual action to create and/or revise one and three year plans
- Steps for goals to meet the strategic plan
- Practical application of plans

Talent Management: All Levels

8. Diversity: Managing a Diverse Workforce

Topics include:

- The business case for diversity
- The diversity continuum - tolerance, acceptance, inclusion, leverage
- The legal parameters of diversity
- Recognizing and appreciating differences
- Diversity Support Groups and similar venues or support mechanisms
- Dealing with boomers, gen X'ers, millennials and others
- Harassment issues
- Managing personal relationships and conflict
- Individual and organizational liability
- Work/Life balance - alternative work arrangements

9. Employee Relations: Optimizing Manager-Employee Relations

Topics include:

- Preventative employee relations practices (can include union-avoidance)
- Employee satisfaction vs. employee engagement
- Today's manager as a coach
- Performance improvement - tips and tools
- Designing and applying internal complaint processes
- Use of surveys, focus groups and self-directed work teams
- Overview of relevant policies, procedures and laws that affect relations
- Creating a culture of inclusion and respect in the workplace
- Understanding/leveraging interpersonal differences (DISC, conflict or similar assessment)

10. HIPOs: Recruiting & Selecting High Performers

Topics include:

- Why "hire slow" matters
- Job analysis and your job description
- Phone and F2F scripts
- Choosing recruitment sources
- Internet savvy
- The ABCs of resume evaluation
- What not to say during an interview
- Behavioral interviewing
- Making the right choice for your organization
- Background checks - should you?
- The offer letter
- Day one...

11. **Interviewing: Hire the Best**

Topics include:

- Before the interview: the job, job description, cultural needs, behavioral fit
- Legal issues and laws surrounding interviewing
- About behavioral and skills set interviewing
- Interview preparation – for you and what to expect from a candidate
- About the resume – what you need to have and what you don't
- Interviewing tactics and techniques
- Phone interviews – the questions, the answers
- Initial face-to-face interviews – the questions, the answers
- Follow-up interviews – the questions, the answers
- The offer letter and the rejection letter
- The new hire and ensuring a great start

12. **Performance Management: Maximizing Employee Performance**

Topics include:

- Planning for superior performance
- Preparing and reviewing job specifications
- Performance management as a business process
- Writing SMART objectives and managing by objectives (MBO)
- Identifying the best performance appraisal tools and process
- Monitoring and evaluating employee performance
- Quantifying performance standards
- Conducting an effective performance appraisal meeting
- Coaching and resolving below-standard performance
- Career planning and development

13. **Talent: Identifying & Retaining Key Talent**

Topics include:

- What is key talent and why does it need a special focus?
- The Talent Circle (select, retain, remove and realign key talent)
- Understanding “performance” vs. “potential”
- Buying vs. building your talent base
- How to recognize or identify high potential performers
- The different types of development – redefining “growth”
- Evaluating your level of key talent loyalty and risk
- Early warning signs of derailment and/or defection
- Nuances in motivating and developing key talent
- 10 non-financial tools for retaining key talent

14. **Team: Developing High Performing Teams (HPT)**

Topics include:

- Heroes vs. teams
- Characteristics & competencies of HPTs
- Selecting team members - styles and skills
- Sorting out individual investment and membership
- Recognizing informal roles & use of authority and influence
- Understanding the stages of team development
- Addressing specific barriers to peak performance
- Situational Leadership and team S.U.C.C.E.S.S.
- Assessing the current & desired state of the team's performance
- 10 keys for effectively leading HPTs

Interpersonal Skills: All Levels

15. **Assertiveness: Power, Polish and Poise**

Topics include:

- Legitimate rights to have your needs met and rights of others
- Assertive, passive and aggressive behaviors and characteristics
- Assessment of your primary response
- Beliefs, attitudes and behaviors affect
- Methods of responding to situations and conflict
- The effect of the past on your present - and your future
- Managing personal baggage
- Conflict management and your ability to be assertive
- Steps to assertive behavior
- Practical application of assertive behavior
- Case study with assertiveness and behaviors

16. **Communications in the Workplace**

Topics include:

- The communication process and management
- Types of communication
- Communication vehicles and techniques at your company
- Personal communication styles - assessment and interpretation
- "Answer First" verbal communications model
- Non-verbal communications
- Listening assessment
- Critical and selective listening skills
- Barriers to effective verbal communications
- Written communication skills

17. **Conflict: Managing Conflict Effectively**

Topics include:

- The definition of conflict
- Traditional versus contemporary view of conflict – and you are?
- When conflict is constructive and when it is destructive
- Effects of unresolved conflict
- Conflict is an opportunity (?!)
- Personal conflict assessment
- Responding versus reacting
- Conflict resolution modes – what to use, why and when
- How best practice organizations use conflict

18. **DISC: Behavior Awareness and Management**

Topics include:

- The DiSC Assessment process
- The DiSC instrument
- Dimensions of DiSC and recognizing key characteristics
- Interpreting individual results
- Application of results to professional growth
- Implications of DiSC results to interpersonal relationships, work productivity, teamwork and communications
- Getting results with DiSC
- “Response” mode versus “reactive” mode
- DiSC practice exercise
- DiSC application to work situations
- Ongoing use of DiSC

19. **PSDM: Skills, Models and Implementation**

Topics include:

- Why have a model?
- Problems and solutions with PSDM
- Self-assessment of your approach to PSDM
- Small scale versus large scale PSDM
- SCOPE/PROBE flowcharts
- Root cause analysis
- Brainstorming
- Cost/benefits
- Planning
- Results analysis

Employee Development: All Levels

20. Managing Change

Topics include:

- Key changes in American business and work environments
- Change as an obstacle or opportunity
- Creating your business case for change
- Understanding and managing the stages of change
- Recognizing your current state of change (strategic and tactical)
- The Head, Heart and Hands approach to change management
- ACHIEVE Model for Change
- Seven steps to organizational change
- Defining your role in change management
- Leading change - internally and externally

21. Creativity: Firm Foundations and Open Windows

Topics include:

- Defining "attitude"
- Attitudes at work and their effect on business
- How and why our attitudes are what they are
- Personalities and attitude
- Determine if you are in need of an attitude adjustment
- The Wheel of Balance
- Attitude and creativity - hand-in-hand
- Creativity techniques (including lateral thinking and mind mapping)
- "Open window" thinking and new perspectives
- Application of creative techniques to spokes on your Wheel of Balance

22. Legal Issues: Managing within Legal Parameters

Topics include:

- The legal aspects of management:
 - Title VII of the Civil Rights Act of 1964
 - Fair Labor Standards Act of 1937
 - Age Discrimination in Employment Act of 1964
- Americans with Disabilities Act and ADAAA
- Family & Medical Leave Act of 1993 and 2008 revisions
- Application of policies and legal requirements to management areas such as recruitment, selection, promotion and termination
- Discrimination, harassment and retaliation in the workplace
- Progressive discipline and documentation
- Effective termination decisions and process
- Privacy and confidentiality issues

23. **Presenting: Effective Presentation Skills**

Topics include:

- Analysis of your presentation
- Identifying the goals - yours and the audience's
- Audience analysis
- Environment analysis - formal or informal?
- Presentation Content - beginning, middle and ending
- Adjusting your style and presentation to the environment
- Your personal style - dos and don'ts
- Top 10 presenter competencies
- Practice the process (including videotaping)

24. **Professionalism Presence: Raising the Bar**

Topics include:

- A definition of professional presence and the benefits and drawbacks
- Business etiquette core principles and their application to your work
- The expectations of professionalism at your organization (culture, etc.)
- Attitude speaks about you
- Slang and "local talk" (e.g., Pittsburghese)
- Effects of non-verbal communications on perceptions
- Business dress that represents a professional presence
- Effectively initiating meetings with clients and co-workers
- Skills to manage meeting mingling effectively
- Actions and behavior when mingling with the "C Suite"
- Dining dangers and do's and don'ts
- Etiquette guidelines beyond the US

25. **Project Management**

Topics include:

- The evolution of project management
- The importance of project management to American business
- Foundation components and the four phases of project management
- Practical application of the basic components of project management
- Case study examination of project management
- Project activities and results of project management
- "People skills" needed for project management
- Impact of communication and teamwork
- The "Triangle of Truth" for project management success
- Implementing project management methodology on-the-job

26. **Project: Advanced Project Management**

Topics include:

- Basic process and philosophy of project management (PM)
- Example projects in contemporary history
- Analysis and application of Phase 1: Planning
- Teamwork skills and key factors which influence project results
- Effect of goals and strategies during PM planning
- Phase 2: Organizing; schedule management and techniques (WBE, GANTT, etc.)
- Conflict and relationships within a project team and Phase 3: Implementation
- Control in Phase 3 of PM: implementing and monitoring of a project
- Problem-solving process in response to the need for corrective actions
- Phase 4: Terminating & Evaluating (analysis, evaluation, reporting of results)
- Practical application of Advanced Project Management

27. **Public Speaking: Butterflies in Formation**

Topics include:

- Audience analysis
- Environment analysis
- Presentation goal setting - WIIFM
- Key content
- Personal style
- Disguising nervousness
- Butterflies in formation
- Great starts
- Solid middle
- Memorable endings

28. **Training: OJT**

Topics include:

- Identifying your learning style and recognizing others' learning styles
- Communications styles and adjusting when needed
- ABCs of OJT
- OJT content
- Task analysis and SOPs
- Your approach and training skills
- Ensuring trainees understand the work
- Practice the process

29. **Training: Skilled Facilitation (Train-the-Trainer)**

Topics include:

- Identifying your learning style and recognizing others' learning styles
- Adult learning application and the Training Triangle
- Planning the training - trainees needs, on-the-job transfer, individual skills
- Analysis of the training needs
- Design of the training session
- Development of the content and materials
- Implementation and personal style
- Managing participant involvement (exercises, questions, negative behaviors)
- Evaluation of the results and on-the-job applications
- Practice the process

30. **Writing: Business Writing Success**

Topics include:

- Calculate “readability” levels
- Recognize, and correct, miscommunications
- The grammar basics
- The three most common problems in business writing
- Difference between the spoken word and the written word
- Active versus passive verbs
- The S.U.R.E. test for communication
- Extra, outdated and useless words in sentences
- Special characteristics of good writing
- Key principles in sentence writing
- The need, and the method, for creating organized writing
- Results: clear, readable, visually-appealing material

Customer-Focused

31. **Building a Customer-Focused Culture**

Topics include:

- Understanding the changing competitive landscape
- Defining new sources of market differentiation
- Core capabilities needed for delivering the ultimate customer experience
- Redefining and creating real “customer value”
- Customer value mapping and individual roles
- Customer service is a mindset – not a department
- Moving from service provider/supplier to business partner
- Collaborating across boundaries – internal and external
- Balancing customer advocacy with customer profitability
- Measuring and improving customer satisfaction and loyalty

32. **Tuning in to Your Customers**

Topics include:

- Defining customer attitude
- Anticipating customers’ needs with a 360 degree view
- Interpreting and communicating customers needs
- Developing customer marketing and brand strategy
- The customer’s viewpoint and impact on decision making (WIIFM)
- Customers and the problem solving process
- Gaining perspective
- Customer feedback processes
- The urgency factor in customer service
- First time resolution
- Creating customer satisfaction
- Building and sustaining relationships

33. **Networking Know-How**

Topics include:

- First impressions count
- Getting to know you...and them!
- Communications dynamics (what's your style?)
- Confidence and trust
- Personal disclosure
- How you can help, support and refer
- Sell yourself...sell your organization
- When to break the rules
- Getting them to buy your brand

This session is often combined with Professionalism and/or Etiquette skills

34. **Selling: Competitive Selling Skills**

Topics include:

- Traditional selling vs. master competitive selling
- Differentiating between price, value, convenience and loyal buyers
- Probing techniques to uncover WIIFM
- Critical and selective listening skills
- Shifting preference to use a supplier/provider
- Changing the reference from price to value
- SPIN selling techniques
- Identifying and addressing clarifications, confirmations and challenges
- Handling objections or rejections
- Trial and presumptive closes

35. **Selling: Consultative Selling Skills**

Topics include:

- Identifying and addressing different customer segments & needs
- Defining segment-specific customer challenges
- Demonstrating a compelling customer value proposition
- Segmenting customer approaches based on life time value
- Product/service push vs. customer pull
- Moving from transactions to relationships; from services to solutions
- Defining and using your customer's "vital signs"
- Managing, servicing and expanding existing accounts
- Practicing your probing and listening skills
- Applying the B.E.S.T. model of consultative selling

36. **Service: Excellence in Customer Service**

Topics include:

- The business case for excelling in customer service
- Aspirations around customer excellence
- The role and types of customer service (inbound, outbound, others)
- Customer service as a commodity or differentiator
- A walk in the customer's shoes
- Identifying and addressing the customer's "Moments of Truth"
- Differentiating customer behavior, satisfaction and loyalty
- Small steps that yield big results
- Using the Customer Compass
- The benefits and use of CRM systems

Workplace Support

37. **Employee Transition and Outplacement**

Topics include: (Note: this is generally a four-part series)

- Moving forward (looking at the past, working on the present, preparing for the future)
- Resume building
- Networking (who, when, where, why and how)
- Mock Interview (preparing for the interviews, phone screens, initial face-to-face interviews, panel or group interviews, interview follow-up)

38. **Fitness for Duty: Awareness, Management of, and Responsibility**

Topics include:

- What is 'fit for duty' - what is 'unfit for duty'
- Performance and FFD
- Policies and procedures
- Responsibilities of employees and supervisors
- Supervisory actions when confronted with a FFD situation
- Enabling
- FFD 'traps'
- Dos and Don'ts of managing FFD
- Case study

Note: this session is often separated for staff and supervisors

39. **Harassment and Discrimination Prevention**

Topics include:

- The legal parameters and your responsibilities
- Harassment, discrimination, reasonable woman standard and other definitions
- Liabilities
- Actions that constitute harassment and discrimination
- Costs of harassment and discrimination
- Addresses, preventing and correcting harassment and discrimination situations
- In-house policies and practices
- The investigative process

This session can be tailored to employees, management and/or the investigative process

40. **How to Complete, Manage and Store Your I-9s**

Topics include:

- About the USCIS
- The I-9 Form and impact on your organization
- I-9 requirements
- Common errors and repairs
- Your review and management process
- Internal audits
- External audits
- USCIS audits
- Initial, short term and long term record-keeping of I-9s

41. **Meeting Management**

Topics include:

- The difference between Good, Bad and Ugly meetings (and how to have only Good ones!)
- When TO have a group meeting
- When NOT to have a group meeting
- Establishing meeting “rules”
- The parking lot, construction and floor
- Meeting guidelines (before, during and after)
- 6 Thinking Hats
- Addressing ‘cross talk’
- Competing conversations
- Settling the arguments
- Uncovering hidden agendas
- Process tools for meeting discussions (e.g., Ishikawa or fishbone diagrams, mapping, etc.)
- Post-meeting analysis

42. **Safety NOW**

Topics include:

- Safety responsibilities from a corporate perspective
- Safety responsibilities from an employee, and individual perspective
- The “Top 10 Mortal Sins of Safety” and how to correct them
- Using safety procedures effectively
- OSHA and you
- Accident Investigation
- The role of motivation in safety
- Motivation techniques to encourage employees to make safety a daily part of their work (and home) life
- Corrective action for safety errors
- The Five-Minute Safety Huddle
- Transitioning safety training to day-to-day safety

Note: Compass can also provide specific training within Safety Topics such as Lock Out/Tag Out/Hazardous Energy, Good Housekeeping, Proper Lifting, Hearing Conservation, PPE, etc.

43. **Stress Management**

Topics include:

- The evolution of stress in today's society
- Differentiating between positive and negative stress
- The effects of stress mentally, emotionally, and physically
- The "distress" signals
- "Burnout" and its link to stress
- Your personal stress level
- Your sources of stress and specific stressors which contribute to distress
- Techniques and methodologies to effectively manage stress

44. **Time Management: Managing Your Clock**

Topics include:

- Obstacles to time management
- Creating a personal vision
- Weekly time assessment
- PIE exercise and striking a balance
- Prioritizing using the Priority Matrix
- Planners (electronic and paper); from master list to planner
- Conducting effective meetings
- Successful delegation
- Project management basics

45. **Union Avoidance: Managing to a Positive Culture**

Topics include:

- Defining your culture
- Why unions form
- Leadership action to create a positive culture
- The importance of interaction, understanding and communication
- Addressing negative issues - fair, firm, fast
- The legal side of unionizing
- The union organizing process
- Managing away from union organizing
- Keeping a positive culture

Leadership Series Example

1. Constants of Effective Management

Topics include:

- Constants of the effective leader
- Professionalism defined
- Ten rookie mistakes
- How things have changed . . .
- Managing personal relationships
- The importance of objectives and writing SMART objectives
- Managing your manager (upward management)

2. Managing within Legal Parameters

Topics include:

- The legal aspects of management:
 - Title VII of the Civil Rights Act of 1964
 - Fair Labor Standards Act of 1937
 - Age Discrimination in Employment Act of 1964
 - Americans with Disabilities Act and ADAAA
 - Family & Medical Leave Act of 1993 and 2008 revisions
- Effective union avoidance (including what you can and cannot say)
- Application of policies and legal requirements to management areas such as recruitment, selection, promotion, and termination discipline and documentation

3. Recruiting High Performers

Topics include:

- Preparing and reviewing job specifications
- Analyzing departmental staff and identifying recruitment sources
- Evaluating resumes and/or applications
- Utilizing behavioral interviewing techniques
- Selecting the best candidate
- Checking references
- Offering the job
- Creating an orientation checklist

4. I'm Communicating . . . Are You Listening?

Topics include:

- The communication process and management
- Types of communication
- Personal communication styles
- Breakdown and repair of communications
- Communication at your organization
- Listening skills including selective listening
- Listening self-assessment
- Keys to effective listening

Leadership Series Example *continued*

5. **Managing Conflict Effectively**

Topics include:

- Traditional versus contemporary view of conflict
- When conflict is constructive and when it is destructive
- Effects of unresolved conflict
- Conflict is an opportunity
- Personal conflict assessment
- Conflict resolution modes and their use

6. **Identifying & Retaining Key Talent**

Topics include:

- What is Key Talent and why does it need a special focus?
- Understanding “Performance” vs. “Potential”
- How to recognize or identify high potential performers
- Nuances in motivating and developing key talent
- 10 non-financial tools for retaining key talent
- Early warning signs of derailment and/or defection
- Pros and Cons of firm-wide talent reviews
- The role and value of succession planning

7. **Developing High Performing Teams**

Topics include:

- Heroes vs. teams
- Characteristics & competencies of HPTs
- Selecting team members – styles and skills
- Understanding the stages of team development
- Examining specific internal barriers to peak performance
- Dealing with common external barriers
- Assessing the current & desired state of the team’s performance
- 10 keys to effectively leading HPTs

8. **Maximizing Employee Performance**

Topics include:

- Planning for superior performance
- Preparing and reviewing job specifications
- Writing SMART objectives and managing by objectives (MBO)
- Performance appraisal tools and processes for your organization
- Monitoring employee performance
- Quantifying performance standards
- Facilitating change
- Evaluating employee performance
- Conducting an effective performance appraisal meeting
- Coaching and resolving below-standard performance

Leadership Series Example *continued*

9. **Motivation: Theories and Tools**

Topics Include:

- Why we study motivation
- Limits of motivation in the performance cycle
- Maslow's Theory
- Thematic Apperception Test (self-assessment tool)
- Frederick Herzberg's Two-Factor Theory
- Equity Theory
- Defining your motivational environment
- Creating your department's motivational environment
- Personal inventory

10. **The Lessons of Leadership (can also be developed as an In-Basket final session)**

Topics include:

- Management versus leadership
- Personal leadership assessment
- Critical skills of situational leadership
- Importance of belief systems
- Communication and leadership
- Lessons from the leaders