



Morgan Training and Coaching LLC
Leadership & Professional
Training & Development
Menu of Services
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INTRODUCTION

Morgan Training and Coaching LLC is a full-service consulting firm specializing in leadership development, executive coaching and corporate training. We design and facilitate a wide variety of training workshops for both organizational leaders and professionals that teach new skills, build individual capabilities and drive better performance. From entry-level management through executive-level leadership, we are extremely committed to helping all levels of talent in the organization improve their overall effectiveness and advance their careers.

Morgan Training and Coaching LLC has been dedicated to training and improving employee and leadership performance for more than 18 years with both Fortune 500 clients and non-profit organizations. The consultants at Morgan Training and Coaching are a diverse team of highly talented learning and development leaders, each bringing a unique and complementary set of skills and experiences to our practice. Our consultants, designers and trainers are very seasoned and consistently receive excellent feedback. They offer years of expertise from both the business and non-profit sectors and a large cross section of industries, including financial services, retail, insurance, and healthcare. Our consultants' advanced degrees and extensive knowledge of adult learning theory and talent management support their years of experience in developing the professionals and leaders of today and tomorrow. Individual bios are available upon request.

Our team is dedicated to both maintaining long-term consultants and continually recruiting new talent. In order to provide our customized services in an ever-changing industry, we are committed to having a varied team who can meet the individual needs of our clients. In our commitment to continued growth, each new member of our team participates in rigorous training in both the philosophies and diverse methods of Morgan Training and Coaching LLC.

CUSTOMIZATION OPTIONS

Since many of our training topics benefit leaders at all levels as well as individuals in non-management positions, each of our workshops can be tailored for learners at various stages of their career and customized to meet your audiences' unique needs.

- Full-day classes and multi-day programs can be delivered in abbreviated formats based on your desired time commitments.
- All classes can be converted into webinars and conducted as virtual training sessions. Please inquire to determine if this format would align with your employee population's needs.

If you have a need for a specific consulting service, coaching, program or class that is not listed in this menu, please do not hesitate to contact us. We have the capacity to design and deliver programs to build the full range of leadership and professional skills.

CONSULTING SERVICES

At Morgan Training and Coaching LLC, we partner with business leaders and HR teams to create value-added solutions that help strengthen talent, accelerate career development, build a strong leadership pipeline, foster a culture of high performance and unlock the full potential of their people. We believe each client is unique and take the time to understand specific challenges, opportunities and objectives. We work with our clients to carefully identify the focus for change and growth and then create powerful strategies to address each area.

Our capabilities span all areas of Talent Management and Career Development, providing customized program/process design, tools, training, communications and implementation strategies. Specific areas of expertise include:

- Competency Modeling and Career Mapping
- Performance Management Processes
- Performance Review Design
- High-Potential Program Design
- Candidate Selection Tools
- Bench Strength Development Strategies
- On-the-Job, Experience-Based Development Programs
- Mentor Program Design
- Train-the-Trainer Program

Our consulting services are offered in a short- and long-term retained capacity or on a project basis.

INDIVIDUAL LEADERSHIP DEVELOPMENT

C-SUITE AND SENIOR EXECUTIVE COACHING

Executive coaching engagements are beneficial to senior leaders seeking a more personalized, targeted approach to development. As executives reach the height of their careers, navigating the unique organizational, business and interpersonal dynamics of their roles can be challenging to do independently.

A coaching partnership provides an outside, unbiased sounding board and advisor in a confidential forum where issues can be discussed candidly without judgment, and solutions can be developed quickly and effectively. Through open, ongoing dialogue executives receive expert guidance and encouragement to deepen self-awareness, build their range of executive competencies, improve leadership effectiveness and heighten their level of organizational influence.

One-on-one executive coaching sessions are typically conducted onsite, with engagements ranging from three to twelve months. Depending on individual needs, engagements can also extend beyond this time frame.

Coaching sessions are used to define goals, review progress, develop specific courses of action, discuss new developments and assess factors contributing to, or detracting from, goal achievement.

In addition to general leadership coaching for C-suite and senior executives, the following additional coaching services are offered:

- **New Leader Assimilation:** Helping executives quickly pinpoint the areas where they can realize the greatest impact and develop a clear roadmap for success during their defining first year.
- **C-level and Senior Executive Succession Coaching:** Helping prepare executives for critical appointments prior to the exits of incumbents to strengthen capabilities, navigate the planned transition phase, and set them up for immediate and long-term success.

MID-LEVEL LEADERSHIP COACHING

The same form of coaching partnership outlined above is also offered to meet the unique needs of the mid-level leader. These engagements are particularly beneficial for identified successors/high potentials looking to accelerate their readiness to advance to the next level of leadership and ensure success, or those managers making the transition from leading individuals to leading high-performing teams. While each individual faces his/her own set of unique challenges and career development goals, some of the most common areas of focus for these engagements include:

- Improving individual/team managerial effectiveness
- Deepening stakeholder relationships up, down and across the organization
- Sharpening communication and presentation skills
- Fine-tuning and flexing interpersonal and leadership styles
- Heightening leadership profile, presence and influence
- Managing competing priorities/work demands
- Navigating the political structure of the organization

Coaching engagements range from three to twelve months. While the exact structure of the sessions and specific actions are determined by the coaching dyad, a blend of the following components is generally included:

- Self-reflection and observation exercises to heighten awareness of self and others
- Strategic network mapping and relationship-building practices
- Feedback-seeking, skill-building and shadowing assignments between sessions
- Relevant book/article review to complement learning

Please note:

- Coaching engagements typically include a custom-designed qualitative 360-degree assessment, which is outlined below.
- Coaching is also offered to leaders who may require more targeted skill-building in specific areas, such as Presentation and Communication skills, and does not include a 360-degree assessment.

LEADERSHIP ASSESSMENTS: 360-DEGREE FEEDBACK

Qualitative performance assessments can be paired with coaching engagements and serve as a useful program foundation to help target efforts. Through a 360-degree feedback process, with performance data collected from multiple sources, individuals build greater self-awareness and an in-depth understanding of how their leadership is perceived by others. **Process components include:**

- **Feedback Collection:** Phone interviews are conducted with a select group of approximately 10 colleagues, including peers/cross-functional business partners, direct reports and manager, if applicable. Questions generally relate to overall leadership impressions, key strengths, top development needs and behavioral improvement recommendations, and can be tailored based on individual leadership objectives.

For new leader assimilation, insights collected relate to:

- Historical and current state of the organization
- Key business priorities and success measurements
- Challenges and opportunities
- Team capabilities, dynamics, concerns, needs and expectations

For succession coaching, insights collected relate to:

- Existing perceptions of performance and targeted areas for development based on capabilities needed for future role success
- Key strategic, operational, relational and organizational opportunities related to their future roles
- **Summary Report:** Data is analyzed and synthesized to create a theme-based leadership summary report, outlining key strengths and development areas along with specific improvement recommendations.
- **Feedback Delivery:** A written feedback summary report is provided to the individual leader and reviewed during an in-person meeting.
- **Development Plan:** Following feedback delivery, leaders complete a personal development plan that translates significant insights from the 360-feedback into a specific set of objectives and action plan.

TEAM DEVELOPMENT

LEADERSHIP TEAM ASSESSMENT AND FOLLOW-UP SESSION

High-functioning leadership teams are critical to business success and often require an external advisor to help optimize performance. Through one-on-one interviews conducted with each member of the team, this assessment focuses on uncovering the strengths and development opportunities as a collective unit and the factors that are impeding and contributing to team success. While the specific topics covered in the assessment would be determined at the onset of the engagement, interview questions are generally related to the following areas:

- Shared sense of vision, purpose and priorities
- Role clarity and distribution of authority
- Decision making process
- Communication
- Collaboration and interdependence
- Relational dynamics
- Conflict resolution

This assessment process is most suitable for intact leadership teams that are struggling to find synergy, have not yet unlocked their full potential, are newly formed or are under new senior leadership.

The deliverable of this team assessment is a feedback report summarizing the interview findings.

In addition to sharing the team feedback report with the respective executive leader, action planning sessions with the intact team can be designed and facilitated. The team action planning session is designed based on the feedback and creates an opportunity for the team to work together on the issues identified as most critical. During this session, a summary of the feedback is presented to the entire team where collective action plans and individual commitments are developed.

Continued team development work, including team- and trust-building workshops and team charter creation, are also offered to address gaps uncovered through the assessment process.

MANAGER CONNECT

Newly appointed leaders, whether hired externally or promoted internally, often require a purposeful assimilation plan to connect with their teams and identify key issues and priorities in order to make an immediate, lasting impact and unlock high performance. Through a combination of in-depth one-on-one meetings with the new leader and group sessions with his/her team, this program helps managers gain a deeper understanding of the factors contributing to their team's success and hindering performance and enables the team to come together as a collective unit to provide feedback and openly discuss and address issues. While the scheduling and frequency of meetings with the leader and team vary based on department needs, this program is best conducted over the course of several days within the same week to gain immediate momentum and generally includes individual meetings with the leader and meetings with the team. This program is suitable for seasoned leaders who have recently acquired a new team, individuals who are new to management and leaders with established teams who want to elevate overall team and individual leadership performance. In order for the leader to extract the most value from this program, follow-up coaching sessions are recommended to provide additional support and help ensure the most pressing issues are addressed and action plans are implemented.

Objectives include:

- Uncover the most pressing team issues and barriers to success
- Develop collective plans to address team issues, including action items, ownership and timing
- Identify the greatest areas of team strength and ways to further leverage core competencies
- Gain specific insight into leadership perceptions, uncover challenges in managing team performance and identify ways to provide improved team leadership, guidance and support

LEADERSHIP DEVELOPMENT PROGRAMS & TRAINING

LEADERSHIP EDGE

©The LeadershipEDGE is a structured development program that integrates multiple learning strategies, including 360° feedback, classroom training, peer coaching and mentor assignments, executive coaching and sponsor support. It provides leaders with an ongoing forum to interact with and learn from their cross-functional peers and executive team members, share best practices and hone critical leadership competencies. The classroom training includes targeted skill-building on organizational influence, interpersonal savvy, effective communication and presentations, strategic visioning and thinking, coaching, agreements, confrontations, and conflict management. While these are the typical areas of focus for mid-to senior-level leaders, this program can be tailored to the specific needs of the organization and can be delivered in an abbreviated format.

Our blended leadership development curriculum includes:

- 360-degree performance feedback
- Interactive classroom work and practice exercises
- Peer coaching assignments and individual leadership coaching
- Executive sponsorship support and formal presentations to sponsors

WOMEN'S LEADERSHIP

While many organizations recognize the value of an organizational culture that embraces women and supports their growth and development, few organizations are able to articulate what they can do to affect organizational change. This program is designed to help women discover their passions; start making an action plan towards their goals and gain support to move forward. This class enables women to break through assumptions that hold them back and helps with motivation and retention. **The duration of this class can range from a half-day briefing to two full days.**

Objectives include:

- Uncover passions and establish an actionable plan to achieve objectives
- Equip women to become leaders and agents of change within the organization
- Understand leadership skills through a gender perspective
- Transition from traditional professional and social roles
- Strengthen women's ability to self-promote
- Design the future from the future

STRATEGIC VISIONING

Creating an organizational vision or a department vision in line with the broader business objectives is an important part of strategy development and transformational leadership. Effective leaders create visions that develop teams who share common values and objectives, communicate frequently, are highly cohesive and have a vivid image of the organization's future. In this class, participants learn how to break free of current barriers, take a new look at relationships in their current environment and think in different and more productive ways. **This is a half-day class.**

Objectives include:

- Create a vision that communicates a clear image of the future to which employees, shareholders and customers embrace and respond positively
- Understand the importance of conveying an ideal future state for an organization or department
- Create a vision that sufficiently conveys clear direction and helps to guide future behavior
- Learn and apply concepts of future time perspective and positive affect
- Utilize thought imagery to recall past events, plan future actions and solve relevant issues

COMMUNICATING STRATEGY

Without a clear understanding of the broader organizational and department strategy and how individual roles fit into the business mix, functional teams often remain unfocused and disengaged. This class explores the importance of a leader's role in communicating a clear, compelling strategy and aligning those around them to deliver on the strategy. Through review of key communication principles and practice activities where learning is applied, participants will further strengthen their ability to communicate strategy in order to gain greater team alignment and engagement and ultimately improve team performance. **This is a half-day class.**

Objectives include:

- Recognize the direct correlation between effective communication and effective management
- Explore key components of leader messaging and the importance of communicating a cascading strategy
- Review best practices for communicating strategy
- Discover how to translate and deliver audience-specific messages for maximum impact up, down and across the organization

MANAGING & LEADING CHANGE

In today's business environment, change is inevitable. Managers at all levels must learn to embrace and lead change in a way that motivates others, ensures full adoption and minimizes disruptions to the business. This class explores the psychological dimensions of change as well as key change management principles and success factors, and prepares leaders to effectively cope with and lead change initiatives. The concepts, tools and exercises introduced apply to individuals who are leading broader business and organizational transformations to shifts in process, policy and procedures. Participants will have the opportunity to conduct a detailed analysis of a change they are currently experiencing and/or leading, and develop plans for change action. **This is a full-day class.**

Objectives include:

- Review the stages of change, typical reactions, stresses associated with change and causes for resistance
- Examine and apply a new approach for effectively navigating change
- Learn an 8-step process to leading change and strategies to minimize resistance and gain commitment
- Understand the importance of planning and communication in effectively leading and influencing change

AUTHENTIC LEADERSHIP

Based on the book, Authentic Leadership, this class examines how the ideal leader is not made up from a defined set of skills but rather on the ability to capitalize on what makes a person unique, sincere and effective. This workshop enables participants to learn more about the important leadership traits that are already within them and put them into practice in order to effectively build, guide and empower their employees and teams.

This is a 3-hour class.

Objectives include:

- Develop self-awareness, gaining authenticity by understanding ourselves better
- Lead authentically from self-knowledge
- Maintain authenticity by establishing support and anticipating challenges

COACHING FOR DEVELOPMENT

This class defines the key skills of coaching and outlines its important role in managing performance. Participants learn critical behaviors involved in coaching and then are given the opportunity to practice in a real-time coaching session with one of their classmates. **This is a half-day to full-day class.**

Objectives include:

- Understand the role of manager as coach and the benefits/risks of the coaching process
- Identify what needs to be accomplished prior to beginning the coaching process
- Learn key skills and effective techniques for coaching including listening, setting goals, giving feedback and motivating
- Practice using a roadmap to structure and facilitate the coaching meeting

PEER-TO-PEER COACHING

Peer coaching sessions are facilitator-led sessions with 5 or 6 individuals where the coaching model and skills learned in the Coaching for Development leadership workshop are applied to real-work situations. During each session, participants share leadership challenges they are currently experiencing while the remaining participants serve as coaches, helping to guide the individuals. This open, confidential and interactive forum provides the opportunity for colleagues to come together and work through issues, receive coaching, gain support and learn from their cross-functional peers. This type of learning environment also promotes meaningful dialogue and benefits participants in the following ways:

- Reinforces coaching concepts learned in the classroom and allows participants to practice coaching skills
- Allows participants to receive immediate, supportive feedback on coaching skills to ensure continuous improvement
- Enables participants to share best practices and gain multiple perspectives on a given issue and courses of action to address
- Builds trust, fosters a sense camaraderie and promotes team bonding

LEADING HIGH-PERFORMING TEAMS

Building and leading a cohesive, high-functioning team is critical to the success of any leader. This class explores the unique dynamics, demands and complexities of managing a team and focuses leaders' attention to creating an open, communicative and collaborative work environment to foster development, high performance and psychological safety. Through a combination of case studies, activities, group discussion and action planning, participants learn to how to gain team commitment and maximize results utilizing the ©6C model — clarity, communication, collaboration, conflict management, candid feedback and career development. This class is appropriate for those leaders making the transition from managing individuals to managing small or large teams and for seasoned leaders seeking to further develop their team leadership capabilities. **This is a half-day class.**

Objectives include:

- Examine team development stages and how to assess where teams fall on the continuum
- Uncover barriers to high performance and how to overcome them
- Learn to apply the ©6C Model for leading high-performing teams
- Discover the importance of providing team clarity on critical success factors
- Explore strategies to promote a psychologically safe environment and one where open communication and collaboration are embraced by all
- Understand how to resolve team conflict by applying conflict management techniques
- Review tips for providing effective team feedback and development opportunities

MANAGER AS COACH

One of the most crucial roles managers play in the day-to-day leadership of their team is Coach. In order to manage performance effectively, encourage continuous skill building and help individuals take greater ownership of their development, leaders must be equipped to conduct powerful coaching conversations. Through this program, which includes intensive coaching practice, leaders will strengthen their competence and confidence in fundamental coaching skills as well as build other leadership competencies critical to achieving strong individual and team performance results. This blended learning curriculum generally includes the following components:

- Coaching for Development Class (Half-day session)
- Leading High-Performance Teams Class (Half-day session)
- Two 90-minute Peer-to-Peer Coaching Sessions
- 1-hour Individual Coaching Sessions

This program can also be delivered in an abbreviated format.

IGNITING YOUR INNER INTRAPRENEUR

As organizations look to evolve and remain competitive in today's marketplace, the need for leaders to think and operate as entrepreneurs inside their large organizations is becoming increasingly critical. Leaders and employees alike are often overloaded with the day-to-day demands of their roles and do not take the time to step back, assess and surface opportunities for change, innovation, growth and improvement. This class introduces participants to the key concepts of intrapreneurship and how they can apply new thinking and approaches to solve work problems and unlock opportunities. Through scenario-based learning and real-world action planning, participants will learn to build critical intrapreneurial skills and foster a culture of innovation inside their own organizations/teams. This class is suitable for those leaders who manage a functional unit, are in a significant position of influence and/or who have decision-making authority. **This is a half-day class.**

Objectives include:

- Understand key attributes and skills that make entrepreneurs successful and why entrepreneurial thinking and action are business critical
- Learn how to apply key entrepreneurial thinking and approaches to your specific role inside the organization, encourage direct reports to do the same and hire for these critical skills
- Analyze business scenarios to determine most profitable courses of action
- Assess current state of the business/operation/department to uncover key areas of opportunity where new ideas/methods would serve profitable
- Develop an action plan to translate new ideas into reality

STRATEGIC THINKING

This class is conducted as a facilitated discussion using various methods of brainstorming and brain stretching, including individual and small group work as well as ongoing, large group discussion. The goal is to identify the key elements of strategic thinking for leaders and have participants make a plan to apply this type of thinking to an immediate need in their worlds. **This is a half-day class.**

Objectives include:

- Define strategic thinking and understand how it differs from tactical thinking
- Identify how to turn tactical tasks into strategic ones
- Learn how to conduct a SWOT (strengths-weaknesses-opportunities-threats) analysis
- Apply strategic thinking to a current problem and identify clear goals of success

ORGANIZATIONAL SAVVY

This is a cutting-edge leadership development class that focuses on a leadership competency that would not have been seen on any company's leadership competency model ten to twenty years ago — organizational and political savvy. Participants learn how to address and navigate effectively through organizational politics and behind-the-scenes, company dynamics, without compromising integrity. Leaders gain political astuteness in order to achieve greater strategic influence and organizational impact while managing career mobility and their team's credibility. Also, as stewards of their companies' resources and reputations, leaders learn to cultivate an ethical leadership cadre and high integrity organizational culture. **This is a half-day briefing to 2-day class.**

Objectives include:

- Recognize the dangers of maintaining “political blind spots” and the career or job clues that leaders might be naive about
- Develop practical, non-manipulative strategies for influencing while maintaining integrity and ethics
- Examine two political styles (Influence Motivator Styles) and their postures toward organization power, politics and influence
- Understand how leaders are perceived and apply techniques to change limiting perceptions

SETTING GOALS FOR EXTRAORDINARY PERFORMANCE

This class focuses on the importance of setting and achieving goals as related to managing performance and during all other times throughout the year. **This is a half-day class.**

Objectives Include:

- Understand the role of goal setting in the performance management process
- Learn and practice effective goal setting techniques for individuals and teams
- Learn a model for feedback and how it relates to goals
- Examine how some principles of authentic leadership integrate with goal setting

GIVING & RECEIVING FEEDBACK

This class focuses on the art of delivering high-impact feedback. Participants will learn how to provide all types of feedback to employees, including difficult performance feedback. **This is a half-day class.**

Objectives include:

- Review detailed tips and tools on how to prepare, deliver and follow-up on feedback
- Identify mistakes to avoid in delivering feedback
- Learn how to deliver difficult feedback

WRITING & ADMINISTERING PERFORMANCE REVIEWS

This class equips managers with the skills required to write effective performance reviews and deliver high-impact feedback. In this class, participants learn detailed tips and tools on how to prepare, deliver and follow-up on both positive and developmental feedback. **This is a half-day class.**

Objectives include:

- Explore the value of leading with positive messaging and delivering constructive feedback in a way that motivates high performance, encourages employees to better leverage their strengths and improve in areas of relative weakness
- Manage the delivery of difficult feedback more effectively and learn how to handle difficult reactions
- Examine a framework to apply to a performance review meeting and develop clear action plans for developmental areas
- Understand the importance of follow-up after the performance review meeting to recognize changes in employees' work styles/approaches in order to appropriately reinforce positive actions or redirect negative behaviors

PRIORITIZATION & DELEGATION

As leaders contend with managing a multitude of responsibilities, they must master the art of prioritization and delegation in order to be most productive in their roles. This class examines how to effectively assess priorities, allocate workload and delegate responsibilities. Participants will also learn the value of empowering others and its role in individual development. **This is a half-day class.**

Objectives include:

- Review popular prioritization tools to help assess team responsibilities, determine key priorities and differentiate between urgent, important and non-essential tasks.
- Ensure efforts and time of both leaders and direct reports are maximized and focused on the right activities
- Examine the benefits, obstacles and risks associated with delegation
- Explore best practices for assigning work and authority
- Understand the importance of clear communication, direction and follow-up as it relates to delegation
- Make the connection between delegation and development

EFFECTIVE DECISION MAKING

Every day within organizations, leaders are required to solve problems and make decisions related to the business, people and process. Often, they struggle with indecisiveness, striking the right balance between individual and collective decision-making processes and arriving at the best decisions. This class explores the process of developing solutions to issues that arise in the workplace and tools and techniques that will facilitate the decision-making process. Participants will work through several case studies of real world examples to apply learned skills.

This is a half-day class.

Objectives include:

- Uncover obstacles to decision making and how to overcome them
- Generate solutions to issues and evaluate options
- Learn how to effectively weigh the risks, rewards, consequences and feasibility associated with possible courses of action
- Avoid common blind spots in decision making
- Explore the pros and cons associated with collective and individual decision making

INFLUENCING WITHOUT AUTHORITY

This class focuses on skills related to influencing and communicating with others over whom leaders do not have direct formal authority. Participants will be introduced to a popular influencing model along with effective communication strategies on how to overcome obstacles they encounter in managing up and navigating through key stakeholder relationships. In this class, participants also have the opportunity to practice positioning their ideas persuasively to increase the likelihood of consideration and acceptance. **This is a half-day class.**

Objectives include:

- Examine the law of reciprocity and how it forms the basis of all successful influence
- Understand and practice managing up
- Know when to influence and how to overcome barriers to success
- Learn the model of "Influencing Without Authority" and how to be effective in its 6 elements; emphasis will be placed on learning how to:
 - Diagnose the other person's world
 - Identify relevant currencies
 - Conduct influence through exchange
- Refine the clarity of a message and incorporate interactive speaking to promote useful dialogue
- Keep individuals motivated, engaged and focused on business priorities to maximize performance and productivity

INFLUENCING FOR RESULTS

This class is similar to the *Influencing without Authority* class, but is customized specifically for leaders who are in a position of authority and need to sharpen their ability to influence up, down and across the organization. Participants learn effective communication strategies and tactics on how to overcome obstacles they encounter in influencing direct reports, peers, more senior cross-functional partners and supervisors. Through a combination of influencing concepts and models, real-world scenarios and practice exercises, participants improve their ability to position and sell their ideas persuasively to increase the likelihood of buy-in and action. **This is a half-day class.**

Objectives include:

- Examine the basis of successful influence and recognize the importance of establishing common ground/values
- Know when to influence, properly orchestrate the timing and involvement of others and how to overcome barriers to success
- Learn a popular influencing model and how to master it
- Present strong cases and sell ideas to build consensus, gain buy-in and mobilize individuals/groups to take action

ORGANIZATIONAL IMPACT: DEVELOPING SELF & OTHERS

This class reinforces the importance of leaders taking charge of their own personal development and those they manage each and every day on the job. Through the introduction of leader-led development concepts, real world examples of on-the-job development activities and a learning framework, participants learn to heighten their self-awareness, take greater ownership of their personal growth and the development of their direct reports to create a positive organizational impact. **This is a half-day class.**

Objectives include:

- Identify the obstacles faced in leadership development and explore the critical skills for leadership success
- Understand the importance of taking ownership of ongoing development to maximize performance and potential and the critical role managers play in developing future organizational leaders
- Examine an on-the-job learning framework and learn how to integrate valuable development activities into everyday work to provide the necessary level of challenge and exposure to accelerate growth
- Create SMART personal development goals and a plan to support ongoing growth as a leader

MANAGING INTERPERSONAL CONFLICT AT THE SENIOR LEVEL

As senior leaders contend with managing multiple, and often competing demands, priorities, agendas and personalities of their constituencies, their need to effectively manage conflict, make tough calls, act decisively and serve as mediator becomes critical. Through an exploration of different conflict management styles, open-forum discussion and coaching, participants learn to improve their comfort level and abilities to navigate difficult situations and resolve conflict. This open, confidential and interactive forum, tailored for a small group of participants (5-6), provides the opportunity for senior leaders to learn new approaches, collectively work through issues and gain insight from their peers. This blended training and coaching session is beneficial for senior executives who are managing relationships up, down and across the organization as well as at the board level. Scenarios can be customized for the unique needs of each participant group. **This is a 3-hour class.**

Objectives include:

- Explore the interpersonal challenges senior leaders face with their constituencies
- Understand different conflict management styles and the benefits of adapting approach to different situations
- Examine and learn new conflict management strategies to employ through real-world scenario discussion and role-play

MANAGING MILLENNIALS

Recent research conducted by ASTD and PwC suggests that focus on targeted development and engagement strategies among the Millennial Generation, people born between 1977 and 1997, is becoming more and more of a business imperative as one million Millennials enter the workforce each year. This class explores generational differences in the workplace and equips leaders of Millennials with the insights and skills necessary to navigate these relationships, adapt their leadership style and create an environment that fosters optimal performance. With a focus on current research, practical, day-to-day strategies, interactive exercises and action planning, this class provides leaders with insights on direct-control work factors to engage and motivate their teams. Course content is designed for seasoned leaders managing blended generational teams or those comprised largely of Millennials. **This is a half-day class.**

Objectives include:

- Discover the unique work values and motivational factors of the Millennial Generation and the tactics to manage this group more effectively
- Learn engagement strategies to keep work interesting and meaningful and support continuous development
- Examine informal learning and recognition strategies and how to best employ them
- Understand the importance of interpersonal connections and creating the structure, vehicles and processes for improved communication, collaboration and execution

PERSONAL LEADERSHIP EFFECTIVENESS & PROFESSIONAL SKILLS

THE ART OF THINKING ON YOUR FEET

This is one of Morgan Training and Coaching LLC's signature classes. It was designed in 2002 and quickly grew to become our most popular communications class as it incorporates all the important principals of clear communication. This class helps participants communicate more effectively, whether they are speaking with their managers, colleagues, clients, in meetings or at the water cooler. It focuses on the components of communication that are crucial to a leader's success, including body language, tone of voice, organization, confidence, dealing with questions and objections and listening skills. **This is a full-day class.**

Objectives include:

- Communicate effectively and increase confidence in meetings, one-on-one situations, impromptu discussions and planned communications
- Enhance delivery style and structure ideas clearly for maximum impact
- Improve ability to promote interactive communications and respond constructively to questions and objections
- Increase effectiveness in communicating with all levels of the organization

SENIOR ART OF THINKING ON YOUR FEET

This class picks up where The Art of Thinking on Your Feet ends and is geared more towards senior leaders in the organization. In addition to focusing on the basic components of communication that are crucial to a leader's success, this class also examines crafting and delivering effective leadership messaging, maintaining a strong executive presence, dealing with communication objections and delivering tough news. **This is a half-day class.**

Objectives Include:

- Increase communication skills for both impromptu and planned communications
- Enhance nonverbal delivery behaviors to increase executive presence
- Structure ideas clearly for impactful leadership messaging
- Make communications more interactive and increase ability to respond constructively to questions/objections and deliver tough news
- Understand leadership communication challenges, and review principles of strong communication and messaging

INTERCULTURAL COMPETENCE & COMMUNICATION

In today's global workforce, it is more important than ever for employees to develop a deeper understanding of individuals who have different backgrounds from their own. Too often communication breaks down and relationships become strained due to lack of cultural intelligence and sensitivity. In addition to teaching the principles of effective communication, this class will provide participants with insight into different cultural norms so that they can communicate and interact more effectively across diverse work teams.

Objectives include:

- Communicate effectively in meetings or one-on-one situations and enhance delivery style
- Structure ideas for maximum impact and improve ability to make communications interactive
- Explore the concept and skills associated with cultural intelligence and tips for developing it
- Discover communication norms associated with different cultures
- Learn to recognize cultural differences and adapt communication style to create more productive interactions

Note: This is a half-day class that can be customized to align with the cultural composition of the team and paired with Art of Thinking on Your Feet for a full-day session. This class uses some of the foundational elements of Art of Thinking on Your Feet while exploring the values and communication nuances of different cultural groups.

STORYTELLING SIMPLIFIED: HOW TO CRAFT & CONVEY A COMPELLING STORY

Telling stories is a powerful form of self-expression and, when mastered, enables people to connect with one another on an emotional level and strengthen relationships. In this class, participants will learn to discover their personal brand and express their authentic leadership voice and life experiences in a way that resonates, inspires and teaches. Participants will leave this class with the skills and confidence that will make them more engaging storytellers -- and presenters -- along with a 2-3 minute story they can use in any workplace context and in their everyday lives. **This is a half-day class.**

Objectives include:

- Examine the most meaningful aspects of their personal or work experiences that have shaped who they've become
- Learn a framework that will guide participants through the storytelling process
- Deconstruct a big idea and translate it into a clear, compelling narrative
- Review tips and techniques that will enable more powerful self-expression
- Develop their own unique storytelling style and greater confidence in communicating their stories

DEVELOPING A RESILIENT MINDSET™

Resiliency is the ability to bounce forward in times of adversity and to see challenges as opportunities for growth. When we work in a world where change is constant and inevitable, resiliency skills are crucial. One study from PwC shows that “initiatives and programs that fostered a resilient and mentally healthy workplace returned \$2.30 for every dollar spent — with the return coming in the form of lower health care costs, higher productivity, lower absenteeism and decreased turnover.” This class teaches practical strategies for altering negative responses to stress and develops skills to overcome the natural, counterproductive tendencies that get in the way of personal success and have a negative impact on productivity, morale and culture. **This is a half-day to full-day session.**

Objectives include:

- Understand the importance of resiliency and connections between emotions, behavior and the logical brain
- Discover the elements of the Resilient Mindset Model™ — Filter, Act and Interact
- Learn new strategies for developing resiliency and how to apply them

Note: For the half-day session, participants complete a questionnaire that measures their own view of their resiliency and receive a results profile and Concepts Guide that provide direction on improving performance. For the full-day session, a multi-rater questionnaire is administered, providing a more comprehensive view of the person’s resiliency. The detailed results report and resiliency roadmap on the three dimensions of the Resilient Mindset Model™ is then debriefed in the class.

UNLOCKING PERSONAL AGILITY®

Agility -- of which close to 80% is learned and acquired according to research -- is the capacity to recognize, create and exploit opportunities in a changing environment. In order for organizations to become more agile, they need employees who are agile. They need people who will foster change and who are innovators, visionaries, trendsetters, initiators and implementers. In this class, participants will learn about the cognitive biases that get in the way of their ability to generate, evaluate and implement new and useful ideas as well as specific strategies to overcome them. Learners will also participate in a multi-rater feedback process and receive an Agility Profile Report, which includes in-depth information on the four dimensions of the IDEA Model: Investigate, Design, Energize and Apply. This information is highly beneficial, as participants get a full understanding of their current agility strengths and weaknesses and direction to develop skills. **This is a full-day class.**

Objectives include:

- Discover why personal agility matters and what holds us back from being agile
- Learn the four dimensions of the IDEA model — Investigate, Design, Energize and Apply
- Review components of personal agility and debrief profile report
- Uncover strategies to enhance agility and adopt a flexible mindset that promotes the generation and implementation of original, valuable ideas

GRIT: PASSION & PERSISTENCE TO SUCCEED

Many highly talented people fail to reach their full potential and attain senior leadership levels, while other less gifted individuals go on to achieve great successes and high levels of leadership. Based on The New York Times bestselling book, *Grit: The Power of Passion and Perseverance* by Angela Duckworth, this class engages your talent to reach their full potential in their roles, careers and current initiatives. Participants will learn the secret to outstanding achievement — a passionate persistence, also referred to as ‘GRIT.’ GRIT offers a fresh, motivating concept to embed leadership qualities for all employees to succeed beyond what their natural talent would predict. This learning program includes an introduction to key GRIT concepts, self-discovery and group exercises with practical workplace application, and strategies for self-improvement. **This is a half-day class and includes completion of a GRIT assessment prior to the session.**

Objectives include:

- Explore the concept that GRIT is more important than talent for success achievement and GRIT dimensions
- Identify and translate one’s professionally aligned purpose and passions to develop resiliency and persevere
- Improve perseverance skills through difficult situations and deliberate practice
- Understand the importance of shifting individual mindset to control your own fate and working hard to change outcomes

PROFESSIONAL BRAND POWER

A professional brand is an individual’s track record of results combined with unique qualities, beliefs and values. A powerful brand is authentic, visible and differentiated. People with strong professional brands are often those who are unafraid to engage and stand out. This session explores examples of well-known company brands to understand key marketing principles and strategies and how they can be applied to professional branding. Participants will learn a new process to build their own brands and begin to define what they want their brand to communicate. They will also design a network map and discover ways to action this brand in everyday interactions to make a lasting impression in relationships. **This is a half-day class.**

Objectives include:

- Develop a deeper understanding of your professional brand
- Determine a brand statement that keeps you focused and moving forward
- Review and practice communication strategies to implement your brand
- Understand brand sustainability and strategies to let your brand grow and change with time

IT'S YOUR CAREER: HOW TO OWN IT

Many employees believe their career development is in the hands of their company and manager. This workshop debunks this myth by helping participants take greater ownership for managing their careers while building stronger relationships with their managers, colleagues and the broader organization. It focuses on the components of career development that are crucial to success, including career vision, professional branding, goal setting and network building. In this class, participants will have the opportunity to explore individual values, develop a career vision, assess current career state and create a roadmap to achieve envisioned potential. **This is a half-day class.**

Objectives include:

- Review the importance of your professional brand and analyze what you portray to leaders, your manager and colleagues
- Discover and refine the vision you have for your career
- Explore and practice the Career Management Model to review your history, current role, performance feedback and next steps to achieve your career vision
- Develop a plan that ensures long-term career success and engagement

CRITICAL EMPLOYEE CONVERSATIONS

In the book *4-Hour Work Week*, author Tim Ferris states that 'success is based on how many difficult conversations a person has in their lifetime.' We believe employees need to master a few conversations to grow in their careers. This course teaches employees at all levels how to have the following key conversations:

- Asking for ad hoc feedback and providing feedback to their peers
- Engaging senior leaders in the organization and building a mentor relationship
- Discussing promotion and mobility

Participants will learn how to approach, prepare for and determine the best time for career discussions, while having the opportunity to practice and receive feedback from peers. **This is a half-day class.**

Objectives include:

- Review the important employee conversations in order to increase engagement
- Learn best practices in communication approach as well as identify the areas that require your attention to become more effective
- Practice effective preparation techniques and use conversation models to engage others in feedback, mentorship, promotion and mobility conversations

STEPPING UP TO ACCOUNTABILITY

This class provides participants with an understanding of the importance of buying in and committing to goals in order to be the most effective employees. Participants learn the benefits of being accountable to their work tasks for their own goals and for the achievement of team goals. They also see the risks that occur when accountability is avoided and performance stumbles. This workshop pulls key concepts from important business books on accountability like *The Oz Principle* and *The Five Dysfunctions of a Team*. A moderate amount of customization can be included in this program when provided for intact groups. This includes adding scenarios that are real to the participants' worlds and dedicating more time addressing the most salient accountability challenges for the group. **This is a half-day class.**

Objectives include:

- Examine what accountability is and why we care about it
- Learn the four steps to accountability: See It, Own It, Solve It, Do It
- Distinguish between 'above the line' behaviors such as showing ownership and solving problems and 'below the line' behaviors such as blaming and making excuses
- Turn failure into a learning tool instead of something to fear
- Understand what communications are needed to increase accountability
- Discover the role of time management in accountability; looking at the effects of disorganization and procrastination

PRESENTATION SKILLS: GENERAL AUDIENCE & SALES PROFESSIONALS

This is another signature class of Morgan Training and Coaching LLC, and focuses on formal presentation skills, reviewing all the critical success factors to delivering both informational and persuasive presentations. Participants learn the importance of body language, tone of voice and organization in presentations, as well as become more equipped to handle questions, encourage interaction and engage the audience. As part of this program, participants will deliver two presentations that are videotaped and receive extensive feedback and coaching from their trainers. **This is a full-day class followed by individual coaching. This program can also be delivered exclusively for a sales professional group, focusing on THE POWERFUL PITCH to win business.**

Objectives include:

- Use the principles of delivering effective informational and persuasive presentations
- Organize and prepare presentations in a logical sequence
- Improve ability to make presentations interactive
- Respond constructively to questions from the audience
- Increase self-confidence in presenting

DESIGNING PRESENTATIONS WITH IMPACT

Many employees have had a chance in their professional careers to take a class on communication skills, usually with a focus on how to present messages and respond to audience input. This class adds to that communications skill set by targeting the actual content of the messages participants need to deliver. Working from 10 'elements of impact,' learners use a real communication from their work and bring it to life to increase effectiveness and meet their presentation goals. This class is suitable for any employee who has to craft presentations, whether for formal settings, regular meetings or informal talks. **This is a 3-hour class.**

Objectives include:

- Clarify the goal of their presentation
- Assess the needs of their audience in advance
- Craft a powerful opening and memorable close
- Determine their main points for impact and weave these together using persuasive language and relevant examples
- Create effective PowerPoint slides

BUILDING INTERNAL & EXTERNAL PARTNERSHIPS

The focus of this class is on creating valuable alliances in order to help employees achieve their goals. **This is a 3-hour class.**

Objectives include:

- Learn how to identify and influence stakeholders
- Prioritize stakeholders and customize engagement plans for each
- Build alliances of internal and external partners who can help with goal achievement
- Expand network of possible stakeholders
- Apply the practices to a current work challenge

MAXIMIZING WORK RELATIONSHIPS

This class examines how to work together more effectively with colleagues up, down and across the organization. Participants examine the pathway for successful relationships that covers understanding of self and others and then apply this understanding in order to improve interactions at work. **This is a 3-hour class.**

Objectives include:

- Gain a deeper understanding of key stakeholders in your world; areas examined include:
 - Background
 - Short- and long-term goals
 - Needs, interests, motivators and pressures
 - Work styles
 - Strengths and limitations
- Increase self-awareness through the lens of emotional intelligence
- Learn how to apply this understanding to critical application areas, including:
 - Contracting
 - Disagreeing
 - Networking
- Make concrete action plans to easily translate learning into real world situations

MANAGING UP

This class explores similar concepts presented in Maximizing Work Relationships, with particular focus on navigating the employee-manager relationship. Through examination of key relationship skills, participants learn how to improve their ability and comfort level in managing relationships with their supervisor to ensure positive, productive interactions and outcomes. **This is a 3-hour class.**

Objectives include:

- Create a relationship map in order to understand the key relationships in their worlds
- Use 'managing up' as a case study for examining key relationship skills, including:
 - Understanding your manager (their styles, needs, motivators, pressures, etc.)
 - Interacting with your manager (celebrating their successes, disagreeing and presenting problems)
 - Understanding yourself
- Learn how to apply relationship skills, such as saying no, persuading, making agreements and giving feedback, in common scenarios
- Discuss how to handle the ends of the relationship continuum: how to fix a broken relationship and how to handle the 'friends factor'

TOP-NOTCH TEAMWORK/EFFECTIVE TEAM BUILDING

Top-Notch Teamwork (“TNT”) defines what it is to work on a high-performing team and enables participants to develop the critical skills necessary to be an effective team member. Through a team simulation exercise, discussion on high-functioning team experiences and exploration of team dysfunctions, participants gain a fuller appreciation for unique team dynamics and practice the skills involved in building and managing more productive team relationships. This class is suitable for intact teams as well as for individuals seeking to become more effective team members. **This is a half-day class.**

Objectives include:

- Learn what it means to be part of a team and explore how teams are functioning
- Review the stages of team development and the value of a high-functioning team
- Examine five common dysfunctions of a team, causes of breakdowns and strategies to overcome challenges
- Develop a team charter for intact teams or a SMART action plan

MANAGING WORK STYLES

People are not as easy to manage as projects. They’re complex. Diverse. Prone to conflict. So what’s the secret? Understanding each other’s behaviors, so you will be better able to work effectively together and create a high performance workplace. SOCIAL STYLE is the world's most effective interpersonal effectiveness model. It's easy-to-understand and apply, which means individuals and organizations can quickly improve productivity simply by understanding the four SOCIAL STYLEs: Driving, Expressive, Amiable and Analytical. In fact, recent independent research found SOCIAL STYLE more effective than Myers-Briggs Type Indicator (MBTI) and DiSC.

This tool will be administered as a multi-rater assessment with several peers, managers and staff completing the assessment to determine how participants are perceived related to both their style and versatility. The crux of learning this model is to understand how to flex to all levels of the organization to produce more positive outcomes. **This is a half-day to full-day class.**

Objectives include:

- Identify how work style impacts the way we work with and influence others
- Recognize the strengths and limitations associated with each style
- Identify the behavioral styles of others through observing verbal and non-verbal behavioral clues
- Utilize skills and strategies that apply to being influential with managers, colleagues and clients

As a follow-up to this class, a Multi-Rater Versatility Checkup Profile and individual coaching session to review the assessment is offered for those participants who have previously taken SOCIAL STYLE training and completed a Multi-Rater Profile. The Versatility Checkup is an online, multi-rater questionnaire completed by the participant and a selection of colleagues and provides a detailed results report and actions for improvement for each of the four components of Versatility – Image, Presentation, Competence and Feedback. The Achieving Higher Versatility Resource Guide is included with the profile.

ASSESSING YOUR STYLE WITH DiSC

The DiSC profile assessment is also among one of the most widely used personal development instruments, providing valuable insight into one's own behaviors and helping to improve interpersonal effectiveness. This class is designed to provide participants with information on their behavioral styles as well as learn about the styles of others in order to strengthen work interactions and communications. This interactive course includes numerous individual and group exercises and discussion and is best delivered for intact teams. DiSC personal profiles are completed by participants in advance of the class or can be completed in the training session. Although less detailed, a quicker and less expensive option is to have participants complete PACE profile assessments instead of DiSC. All activities in this class can be customized to real-world client situations and additional team exercises can be incorporated to further emphasize learning around the different styles. **This is a half-day class.**

Objectives include:

- Learn more about oneself and others by exploring different DiSC behavioral styles and identifying the key traits of each
- Practice how to adapt behavior in communicating and working with different styles
- Connect the learning from the class to interpersonal interactions at work and elsewhere

INTROVERTS, EXTROVERTS & AMBIVERTS: WORKING WITH, NOT AGAINST DIFFERENT STYLES

Recent attention in the business world has shined a spotlight on the differences of introverts vs. extroverts vs. ambiverts in the workplace. Based on research, participants learn the importance of understanding the different styles and working with, not against each other in the workplace. Extra focus is placed on the value on introverts in a world where it often seems as if the fastest, loudest, most extroverted voice wins. **This is a 3-hour class.**

Objectives include:

- Identify their own style and the style of others on the introversion-extroversion spectrum
- Distinguish myths vs. truths of each style
- Discuss and practice style flexing in different situations (and how to recoup when done)
- Apply style knowledge to common workplace scenarios such as motivating, communicating, meeting and leading

EMOTIONAL INTELLIGENCE

Emotional intelligence is inextricably linked to both leadership and professional success in the workplace. While many individuals have mastered the functional aspects of their roles, many struggle with their ability to effectively manage the more nuanced relational dimensions of performance. This class explores emotional intelligence and its critical value in the workplace to improve interactions with colleagues and internal/external customers and build highly productive, meaningful working relationships. **This is a half-day class.**

Objectives include:

- Learn to recognize the emotions of oneself and others, and how to use this awareness to better manage one's own behavior and the relationships with others
- Explore the impact of both positive and negative emotions at work, and understand the impact emotions have on individual behaviors
- Assess emotional intelligence by identifying strengths and weaknesses and developing an action plan to strengthen self-awareness and regulate emotions to produce more positive interactions and outcomes
- Examine the link between Emotional Intelligence and communication, and learn how to build greater social awareness skills to increase communication effectiveness and foster stronger relationships

EMOTIONAL LITERACY AT WORK: PRELIMINARY COURSE

How is emotional intelligence utilized? This class focuses on the ability to name and distinguish one's current feelings as a necessary tool to think clearly and make sound decisions. Participants will explore which feelings are appropriate to communicate at work and how to do so in a professional manner. **This is a half-day class.**

Objectives include:

- Learn and practice how to connect with your seven primary feelings which are operating nonstop
- Understand how too little or too much emotion hinders cognitive skills
- Recognize and articulate the factual information each feeling carries, whether about the past present or future
- Learn how to include emotions during business discussions to boost credibility, collaboration and problem solving
- Learn a model to detect and respect emotional states in others

EMOTIONAL LITERACY AT WORK: ADVANCED COURSE

The smartest professional can make misguided decisions in the heat of the moment. This workshop focuses on the ability to know when you or others are being driven by spiked emotions and how to diffuse impulsivity before it damages relationships or impedes productivity. Participants will engage in drills to pinpoint and name the shifting levels of intensity of the primary emotions as a tool to de-escalate elevated states and reestablish peaceful collaboration. **This is a half-day class. The prerequisite for this class is Emotional Literacy at Work: Preliminary Course.**

Objectives include:

- Review how to detect the warning signs of inflamed feelings within oneself
- Practice how to quickly shift your emotions from immoderate levels to moderate levels
- Practice defusing emotional overload in others
- Identify mistakes to avoid when moderating spiked feelings

CULTURAL AWARENESS & INCLUSION

In today's business environment, we are all often managing work relationships across fundamental cultural differences. But this is rarely, if ever, fully acknowledged and integrated into our capacity as co-workers or leaders. Starting with the premise that cultures are all around us – national, functional, organizational, regional, gender, ethnic – this program provides participants with increased awareness of the cultural dimensions that we value in ourselves and those we disregard in others. In this class, participants will learn how to examine their own habitual thinking so as not to make assumptions based on outdated or unexamined experiences, and prepare for challenging conversations within a tested win-win framework. **This is offered as a half-day introductory class or a full-day skill-building class.**

Objectives include:

- Examine the power of assumptions and understand the origin of one's own and those of others
- Explore some of the core cultural dimensions that lead to conflict in interpersonal relationships
- Review the results of individual Cultural Orientations Indicator (COI) self-assessment reports
- Learn and practice a framework for preparing for and engaging in difficult conversations that we know we need to have but often put off (i.e. conflictual, performance-enhancing and differing cultural values conversations)

MANAGING DIFFICULT CONVERSATIONS

This class provides participants with the information and tools needed to conduct tough conversations with direct reports, peers, clients and business partners to overcome tension and achieve desired results. Too often people avoid difficult conversations because they don't know how to conduct them effectively, which results in bad situations growing worse. This course teaches the skills needed to deliver tough messages and make these communications more productive for all involved. The session includes lecture, individual and group exercises and role plays. While this course is frequently run for managers, the skills are also appropriate for anyone needing to conduct tough conversations (e.g., project/team leads, peer coaches, etc...). **This is a half-day class.**

Objectives include:

- Understand the need for successfully tackling tough conversations, the risks of avoiding them and the value of handling difficult issues directly
- Avoid the top mistakes in conducting tough conversations
- Master both sides of the communication cycle in difficult conversations, including leading with empathy to show understanding of the other person's perspective and speaking clearly
- Learn and use tools and templates specific to two types of tough conversations – delivering difficult feedback and managing conflict
- Handle defensiveness from the other party
- Follow up their tough conversations to ensure long-term success and help avoid future difficulties

POWERFUL NEGOTIATIONS

This class provides learners with an introduction to the principles, tools and skills of negotiation. The program is grounded in theory developed at the Harvard Negotiation Project, which states that good substantive results in negotiations do not need to come at the expense of strong working relationships. This course includes lecture, group exercises, case studies and role plays. **This is a full-day class.**

Objectives include:

- Increase awareness of negotiation dynamics
- Utilize a systematic framework for preparing, conducting and evaluating negotiations
- Assess and improve on general negotiation skills and learn tactics involved in difficult negotiations
- Connect the learning from the class to professional negotiation challenges

FINDING & USING YOUR STRENGTHS

This program is designed to bring the concepts outlined in Tom Rath's best-selling book, StrengthsFinder 2.0, to life and make them useful in the world of work and beyond. Participants are asked to take the StrengthsFinder assessment in advance of the class. The workshop leads participants through a journey where they: learn the importance of working with strengths; understand the different strengths people can have; identify their own strengths; and look at how to use their strengths on their teams. Learning is gained through a combination of leader-led teaching, individual introspection and facilitation of exercises and discussions. **This is a half-day class.**

Objectives Include:

- Understand the business case behind learning about and building on strengths
- Learn the key traits of each strength
- Identify unique strengths and plan how to develop them
- Examine how to leverage strengths for higher team performance

AGREEMENTS & CONFRONTATIONS

This class focuses on the important elements of making clear and effective agreements with managers, direct reports and colleagues to gain commitment and achieve results. Participants also learn how to appropriately address situations where agreements have been broken to get them back on track. Through review of key communication strategies and tools, participants learn how to effectively engage in difficult discussions while maintaining productive working relationships. **This is a half-day class.**

Objectives include:

- Establish clear agreements and learn to follow up in ways that increase commitment and results
- Learn how to provide recognition when agreements are fulfilled
- Confront broken agreements in a firm and diplomatic manner with the goal of gaining recommitment
- Explore the agreement and confrontation models to help guide discussions and keep points focused
- Understand the importance of clear message delivery and learn how to handle and minimize defensiveness

CONFLICT MANAGEMENT

This class examines the critical skills needed when inevitable conflict occurs in the workplace. Through practice and role plays, participants learn how to manage and diffuse emotionally charged situations, and ensure each party's message is heard to arrive at the best solution. This class can be customized for different audiences experiencing conflict, including senior leadership teams or intact department teams. **This is a half-day class.**

Objectives include:

- Recognize the mindset during conflict and explore critical skills to manage it effectively
- Explore the conflict management process and learn to identify real needs
- Review different conflict management styles based on the Thomas Killmann assessment and understand how to adapt styles based on the situation
- Learn how to effectively solve problems during difficult situations

SATISFYING INTERACTIONS

This class teaches the communication steps all team members should follow when interacting with each other, especially in the critical areas of explaining and updating. Participants explore the communication cycle of speaking and listening, including the impact of body language, tone of voice and words. **This is a half-day class.**

Objectives Include:

- Learn how to send and receive messages more effectively through strong non-verbal and verbal behaviors and listening
- Practice communicating situations
- Recognize and understand the impact emotions and behaviors have on oneself and others
- Learn how to build self-awareness and social awareness skills to increase effective communication

EFFECTIVE CUSTOMER COMMUNICATION

This class is a customer service program that focuses on the key skills necessary for any customer interaction to go well – listening attentively and speaking clearly. This class can also be replaced with another class, The Fundamentals of Customer Service, which covers the 7 tenants of customer service, such as listening, identifying needs, going above and beyond, and handling tough situations. **This is a half-day class.**

Objectives Include:

- Identify their customers and the benefits of serving them well
- Listen attentively to uncover customer needs and make them feel heard
- Learn how leading with listening can improve any interaction
- Speak clearly to build rapport, respond to customer requests and answer impromptu questions
- Leave more helpful voicemails and emails

EFFECTIVE SERVICE RECOVERY

This class helps team members learn how to better address concerns and complaints, remain calm in tough situations and follow a process of service recovery when problems occur. Skills covered include listening, dealing with difficult questions/objections and problem solving. Participants will learn to effectively handle tough customer situations, such as appropriately saying “no” or handling an upset customer. **This is a half-day class.**

Objectives Include:

- Learn and practice specific skills to reduce defensiveness
- Learn specific format for communicating in tough situations
- Make a SMART “making it better” plan

MAXIMIZING YOUR LEADERSHIP TIME

Managing day-to-day leadership demands and often competing priorities are common challenges faced by many managers today. As leaders, making the best use of time is critical to achieving progress and getting results. This class explores how leaders can recoup some of their valuable time through effective delegation and decision-making strategies to create a more manageable workload. **This is a 3-hour class.**

Objectives include:

- Identify what, when, to whom and how much you should delegate
- Learn how to make and successfully communicate a delegation plan
- Discuss how to handle common obstacles to delegating
- Identify important decision-making points regarding time management
- Apply the strategic decision making to choices about managing your workload

TIME MANAGEMENT: THE CONVERSATION

This class provides participants with an introduction to the communication skills necessary for effective time mastery. Through short concept lectures with interactive practice exercises and role plays, participants experience how to best communicate with their colleagues, clients and managers in order to give their time management techniques the best chance of success. **This is a half-day class.**

Objectives include:

- Understand the importance of determining one's own priorities prior to committing to work and communicating effectively to clarify priorities and set and manage the expectations of others
- Lead with listening as a way to improve conversations about managing time
- Learn to tactfully say "no" when appropriate, while still providing effective service and generating alternative solutions that are acceptable to both parties
- Overcome the habitual "yes, but" responses to techniques, such as delegating, procrastinating or handling distractions
- Use feedback techniques to address ongoing barriers to effective time management

TIME MANAGEMENT: THE TECHNIQUES

This class provides participants with an introduction to the principles and skills of general time mastery. Through short concept lectures with immediate, interactive practice sessions and the introduction of tools and practical techniques, participants learn to master time management, prioritize tasks, delegate effectively and overcome challenges in order to boost productivity and results. **This is a half-day class.**

Objectives include:

- Discover how time is currently spent and link time management techniques to key goals
- Learn and practice key tips and tools for organization and prioritization
- Understand the difference between important and urgent tasks and the implications of spending time on both
- Recognize time management barriers, such as distractions, and learn how to avoid them
- Create a delegation plan, based on delegation skills
- Manage expectations clearly

MANAGING FOR SOLUTIONS

This class helps participants respond to workplace issues in a solution-oriented manner. Using tried-and-true models and case studies, participants learn how to examine issues more deeply, and improve their ability to extract and propose solutions in an articulate and effective way. During this session, employees learn to apply critical thinking, problem solving, brainstorming and effective communication skills and knowledge of their audience to increase their effectiveness in moving from problem to progress. In preparation for the class, participants are asked to bring pre-work pertaining to something in their department that requires change. **This is a half-day class.**

Objectives Include:

- Utilize effective communication skills to uncover issues and target delivery to the audience
- Break through road blocks that prevent effective problem solving
- Utilize problem-solving models to effectively extract, propose and act on solutions
- Learn to apply skills to solicit information, communicate compelling solutions and influence others to gain buy in.

CREATIVE PROBLEM SOLVING

This class examines the importance of applying creative thinking in everyday work to solve day-to-day work problems and improve individual contributions. Participants are introduced to brainstorming techniques and will learn how to think more creatively to define problems, generate options, identify the best solutions and take action. During this session, creative thinking skills, a new application model, and a roadmap for addressing issues in the workplace are explored. **This is a half-day class.**

Objectives include:

- Understand creative thinking benefits, opportunities and barriers
- Learn to apply a simple “DO IT” creativity model to address real work issues
- Improve ability to brainstorm effectively and apply techniques in creative conflict resolution
- Use creativity with Six Thinking Hats® to tackle everyday problems from a different angle
- Understand how manager-specific problems could be presented to a team or individuals to creative problem solve and generate alternative solutions to issues

FACILITATING EFFECTIVE MEETINGS

This class is designed for individuals who lead or play a key role in running meetings. Participants learn practical tips and techniques to ensure their meetings are a productive use of all attendees' time rather than a time-waster. During this session, participants will have the opportunity to practice newly learned skills and improve their overall competence and confidence in meeting facilitation. **This is a half-day class.**

Objectives include:

- Diagnose the most common meeting challenges and discover strategies to overcome them
- Learn effective meeting preparation tips, including setting objectives and agenda and organizing logistics, to set the meeting up for success
- Discover how to open and close meetings effectively and encourage participation
- Practice in-meeting techniques to keep meeting on track and redirect course when it gets derailed with off-topic discussions and difficult or disruptive behaviors

MANAGING STRESS & INCREASING MINDFULNESS

This class teaches participants how to effectively cope with stress and pressure in everyday work life and identify the turning point when positive stress turns into negative stress, adversely impacting effectiveness. The psychological process of mindfulness is explored, where participants learn to improve their ability to center attention in the present moment and observe experiences from a distance without judgement.

Objectives include:

- Understand the nature of stress and learn how to detect it in ourselves and our teams
- Learn to recognize personal behavior patterns and typical reactions to stress, and how these impact one's work approach
- Examine different, practical ways to deal with pressure on the job while remaining focused and effective and preventing it from reaching a crisis point
- Improve capacity to remain present in the moment, without feeling overly reactive or overwhelmed by external triggers

PROJECT MANAGEMENT FUNDAMENTALS

This class provides participants with an overview of the project management process and its benefits. Participants will learn the terminology used in project management, the roles within a project team, characteristics of a successful project review and the major aspects of project initiation, ongoing project management, and close-out. To conclude, the group will be introduced to a quick overview of the Agile Project Management process. **This is a half-day class.**

Objectives include:

- Develop a solid understanding of project management fundamentals
- Review the key roles in a project and expectations
- Understand components of a project, including project scope, tasks, costs, time, risk, and budget planning
- Discuss and practice key steps in initiating a project, ongoing project management and closure
- Explore the Agile Project Management process

PROJECT MANAGEMENT: UNDERSTANDING & COMMUNICATING KPIs TO KEY STAKEHOLDERS

KPIs (key performance indicators) provide everyone involved in a project with a deeper understanding of a project's status and impact, and are key to making informed decisions. Stakeholders and clients usually need to make fast, smart decisions, which require quality information to be presented in an easy-to-understand format. This course equips current project managers (and those with a fundamental understanding of project management) with insight into the needs of the receiver of the project information. **This is a half-day class.**

Objectives include:

- Review the key metrics most useful to project managers
- Understand best practices when selecting meaningful KPIs to share with your stakeholders
- Discover multiple ways to structure metrics and dashboards
- Enhance communication strategies to provide project updates and engage stakeholders and clients in productive discussion

UNDERSTANDING APPROPRIATE WORKPLACE CONDUCT

In order to create a safe, positive and productive work environment, it is critical that all employees understand professional behavioral expectations. This class provides an overview of the policies and standards that your organization expects employees to honor and action. Incorporating your company's Code of Conduct and Workplace Harassment and Anti-Retaliation Policies, participants will engage in group exercises, discussions and a case study to ensure key information is retained and appropriate professional behavior is practiced in all work interactions. **This is a half-day class.**

Objectives include:

- Communicate the company's expectations of employees in the workplace
- Review guidelines on how to self-regulate behavior
- Know when and how to raise an issue
- Provide clarity on support and reporting channels available to all employees and managers

OTHER RELEVANT CLASS TOPICS

While the aforementioned classes are among our most popular offerings, we do provide additional training on a variety of other topics for both leadership and professional skills development. The following list provides a brief overview of other available classes, which are between two hours and a half-day in duration.

MAKING EMAIL MATTER

This class addresses some of the most common challenges with email and helps participants manage email communication more efficiently. Participants will leave with a better sense of how to control their email from both sending and receiving perspectives. Best practice tips and techniques related to the timing, format and messaging of email communication are reviewed during this session. For further development, it is recommended that this class be paired with Time Management and/or Prioritization.

Objectives Include:

- Determine whether communication content is appropriate for email
- Understand appropriate guidelines for constructing and responding to emails and learn to avoid common missteps in email communication
- Improve ability to deal with sensitive emails, a perceived negative tone, and other common challenges such as feeling overwhelmed, unanswered or annoyed

EFFECTIVE TECHNIQUES FOR REWARDING & RECOGNIZING EMPLOYEES

This class teaches managers the importance of reward and recognition in everyday work to promote a positive work environment and strong performance.

Objectives Include:

- Discover what successful recognition and rewards look like and the pitfalls to avoid
- Investigate the different types of incentives and their uses in different situations
- Examine the connection between recognition and motivation and a manager's role in connecting the two

STRATEGIC NETWORKING

This class examines the importance of professional networking, helps to dissolve blocks to actually doing it, and develops the specific skills needed to network powerfully.

Objectives include:

- Examine factors that prevent individuals from networking and explore techniques to address challenges
- Learn key concepts for structuring an "elevator pitch" to successfully and quickly introduce oneself professionally

CANDIDATE SELECTION: BEHAVIOR-BASED INTERVIEWING

This class equips hiring managers and HR professionals with the skills needed to conduct targeted, effective interviews to elevate the quality of talent within their organization.

Objectives include:

- Master the art and science of interviewing to ensure the best candidate selection decisions are made
- Explore the benefits of behavior-based interviewing and understand why it is more effective than traditional methods
- Practice developing questions to assess targeted skill areas and role-play interview scenarios

LEADING HIGH POTENTIALS: OPTIMIZING PERFORMANCE & POTENTIAL

This class focuses on the importance of providing high potentials with the challenge, exposure and on-the job learning experiences to flourish in their roles and accelerate their readiness to take on next-level assignments.

Objectives include:

- Understand the different needs of high potentials and the critical role managers play in developing future organizational leaders
- Examine leader-led development and how it translates each and every day on the job