

MAKING STORIES.net

"We are an Organizational Development firm specializing in using stories to galvanize your organization."

Hi, I'm Terrence Gargiulo. Thank you for coming. I'll be asking you for a business card or name for a drawing at the end of this session.

Applying Business Acumen: Skills to Empower HPT



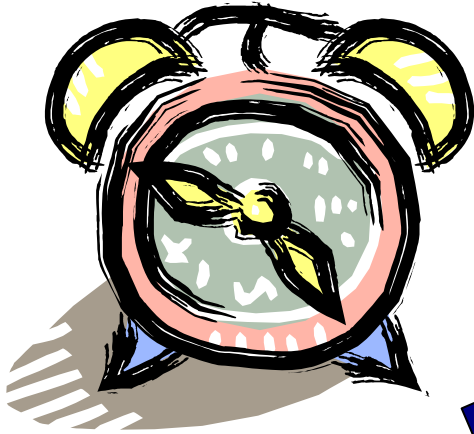
**Researching
the Radical**

**April 6-11, 2006
Dallas, Texas**



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WAKE UP CALL



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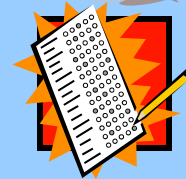
AGENDA

I. What is Business Acumen?



14 minutes

II. Self-Assessment Tool



5 minutes

III. Three Critical Areas of Business Acumen *10 minutes*

IV. Case Study & Debrief



50 minutes

V. Action Plan Tool



5 minutes

VI. Wrap-Up/Drawing



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At your table brainstorm what you think "Business Acumen" means.

WHAT IS BUSINESS ACUMEN?



**7 Minute Brainstorm +
7 Minute Debrief = 14 Minutes**



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Use the self-assessment tool in your handout to measure your Business Acumen.

BUSINESS ACUMEN SELF-ASSESSMENT TOOL™

Circle the score that best describes your proficiency of the skills. Where **1=Novice** and **5=Expert**. Add up your sub-total for each section. At the bottom add all three sub-totals to get your Business Acumen Score.

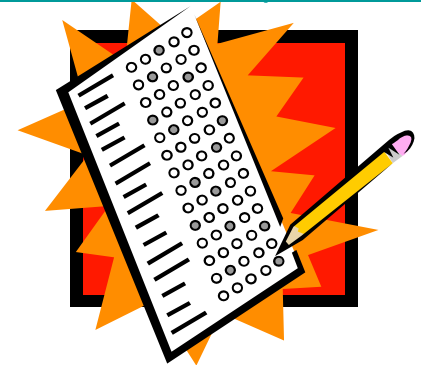
FINANCIAL SKILLS

- | | | | | | |
|---|---|---|---|---|---|
| • Working knowledge of business financial Terminology | 1 | 2 | 3 | 4 | 5 |
| • Ability to read and understand financial statements and analyses | 1 | 2 | 3 | 4 | 5 |
| • Perform three types of analyses of financial statements (vertical, horizontal, and ratio) | 1 | 2 | 3 | 4 | 5 |

5 Minutes



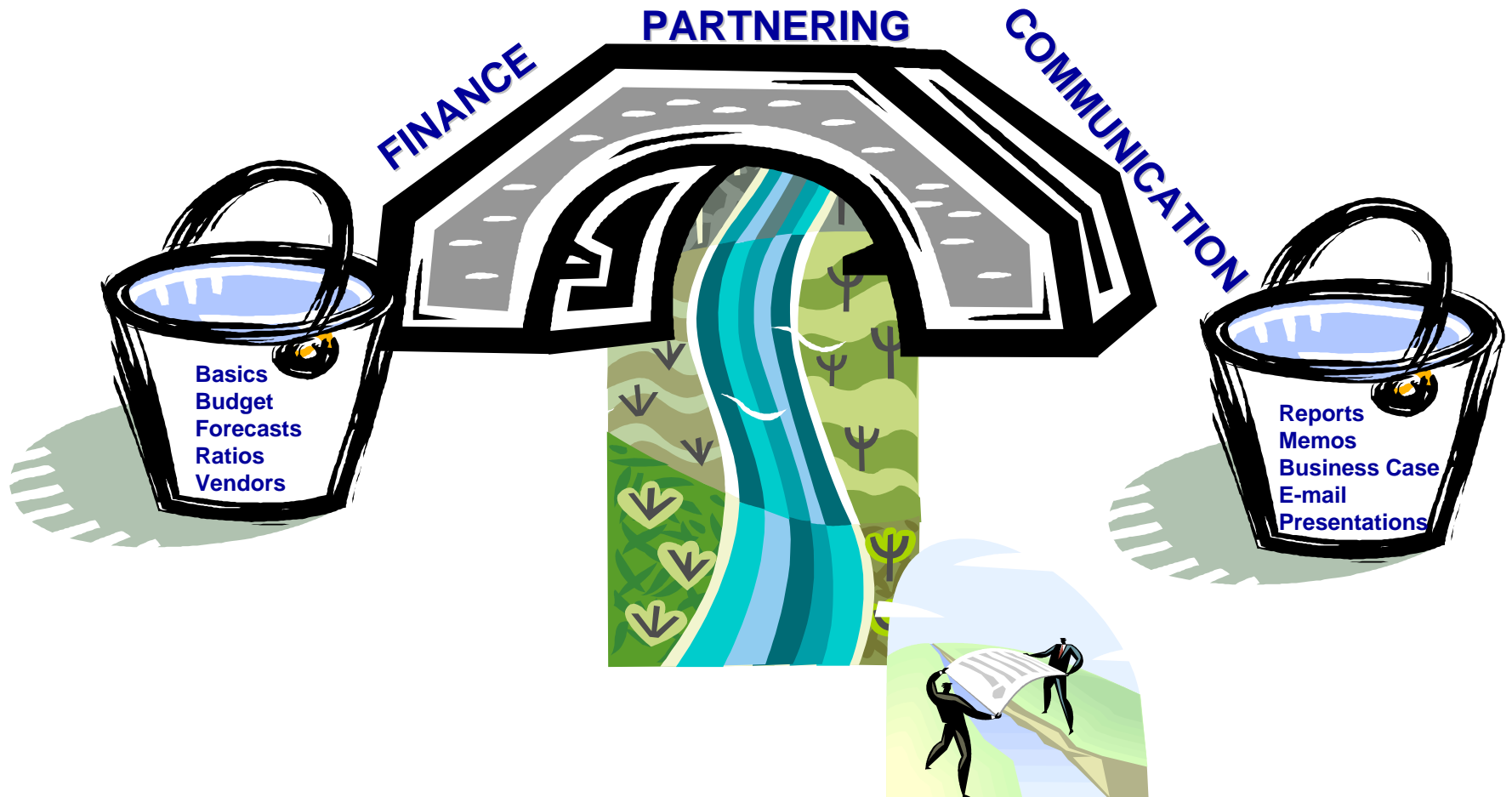
[Click Here To Interpret Scores](#)



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The three critical areas of business acumen are 1). Finance, 2). Partnering and 3) Communication Skills.



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Work at your tables to tackle one of two case studies followed by debrief .

FINANCE CASE STUDY – POGO INSURANCE COMPANY

Company Background:

Pogo Insurance Company is a large group insurer with decentralized regional claim operations, which provides health and disability benefits to the workers in various companies throughout the United States. With 24,000 employees, Pogo's revenues are derived largely from premiums and service contract fees paid by corporate policyholders, while its operating expenses consist mainly of claim-related costs incurred by its home and field operations. The marketing centers generate sales revenue while the claim operations incur expenses. Profit, or shareholder value, is the result of resourceful management of expenses and the creative expansion into new markets and acquisition of corporate clients.

**30 Minutes Group +
20 Minutes Debrief = 50 Minutes**



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Use the Action Plan handout to jot down your next steps for developing your Business Acumen.

DEVELOPING BUSINESS ACUMEN ACTION PLAN

The three critical skills of business acumen:

1. FINANCE SKILLS

- a. Basic Concepts (balance sheets, income statements, cash flow, etc...)
- b. Budgets
- c. Forecasts
- d. ROI
- e. Ratios
- f. Vendor Management

2. PARTNERING SKILLS

- a. Building Institutional Support
- b. Customer Relationships
- c. Internal Relationships

3. COMMUNICATION SKILLS

- a. Memos
- b. E-mails
- c. Reports
- d. Business Cases
- e. Presentations

1. What skills do you want to strengthen?

5 Minutes



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THE STRATEGIC USE OF STORIES IN ORGANIZATIONAL COMMUNICATION AND LEARNING



TERRENCE L.
GARGIULO

MAKING STORIES

*A Practical Guide
for Organizational
Leaders and
Human Resource
Specialists*

Terrence L. Gargiulo

On Cloud Nine

An Inspiring Tale



*Weathering the Challenge of Many
Generations in the Workplace*

ROBERT W. WENDOVER
TERRENCE L. GARGIULO

Illustrations by Eldon Dedini

***May stories...
Stir your heart
Inform your thoughts &
Guide your actions***

Terrence L. Gargiulo

stories at work

using stories
to improve communication
and build relationships

TERRENCE GARGIULO

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Organizational Development, Coaching*



I'd love to hear from
you!

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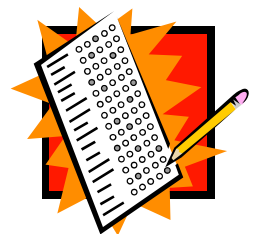
Use the chart below to interpret your score:

	LOW	AVERAGE	MASTERY
Finance Skills	25 or less	26-40	41-50
Partnering Skills	15 or less	16-28	29-35
Communication Skills	12 or less	13-20	21-25
Overall Score	60 or less	61-89	90-110

!!! LOW Overall Score or Low Skill Scores Require Urgent Attention !!!

AVERAGE - Opportunity to Strengthen Your Influence in your organization

MASTERY – Pat Yourself on the Back and Use Your Knowledge to Help Others



HANDOUTS:

DEVELOPING BUSINESS ACUMEN

Presented By:

Terrence L. Gargiulo, MMHS

April 11th, 2006



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BUSINESS ACUMEN SELF-ASSESSMENT TOOL™

Circle the score that best describes your proficiency of the skills. Where **1=Novice** and **5=Expert**. Add up your sub-total for each section. At the bottom add all three sub-totals to get your Business Acumen Score.

FINANCIAL SKILLS

- Working knowledge of business financial Terminology 1 2 3 4 5
- Ability to read and understand financial statements and analyses 1 2 3 4 5
- Perform three types of analyses of financial statements (vertical, horizontal, and ratio) 1 2 3 4 5
- Knowledge of the different types of budgets 1 2 3 4 5
- Manage budget variances 1 2 3 4 5
- Prepare break-even analyses 1 2 3 4 5
- Experience with return on investment (ROI) techniques 1 2 3 4 5
- Decide between hiring or outsourcing 1 2 3 4 5
- Write a request for a proposal 1 2 3 4 5
- Select vendors for a project 1 2 3 4 5

Sub-Total Financial Skills

PARTNERING SKILLS

- Sell the value of our group's services to other parts of the organization 1 2 3 4 5
- Conduct a stakeholder analysis 1 2 3 4 5
- Influencing stakeholders 1 2 3 4 5
- Build partnerships with other parts of the organization 1 2 3 4 5
- Build strong relationships with people on our team 1 2 3 4 5
- Conduct performance management 1 2 3 4 5
- Develop performance based solutions 1 2 3 4 5

Sub-Total Partnering Skills

COMMUNICATION SKILLS

- Write effective business communications (e.g. memos, letters, emails) 1 2 3 4 5
- Write business cases 1 2 3 4 5
- Write reports 1 2 3 4 5
- Write business presentations 1 2 3 4 5
- Deliver business presentations 1 2 3 4 5

Sub-Total Communication Skills

BUSINESS ACUMEN SCORE

INTERPRETING YOUR SCORES

Use the chart below to interpret your score:

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FINANCE CASE STUDY – POGO INSURANCE COMPANY

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Pogo's Northeast regional office employs 500 workers, including claim approvers, administrative, clerical, and supervisory and management staff. With little notice the Hartford central office has been awarded a contract to administer medical and dental benefits for a Northwest Networks, a technology company in Seattle.

People, processes, systems, and associated resources have to be in place within three months. Hartford has directed that existing physical space be staffed with the sufficient claim approvers to begin processing claims by the October 1 deadline.

To complicate the situation, several months later Hartford is also rolling out new technology and programming for administering all Health Savings Accounts, including those of the new client, Northwest Networks. This technology will impact how the newly staffed office handles Pogo's complex consumer-directed health insurance plans, and its ability to curb medical care spending while offering tax advantages for its customers.

Scenario

In anticipation of the October 1st deadline, in mid-August 45 new employees had been hired and set to begin a training program in a Seattle office space with just 15 computer terminals. For Norma, the Pogo trainer, an already stressful situation was made worse by the need to develop additional training materials and accelerate the training so that the new trainees were prepared to process incoming claims for the last quarter of the year. In addition, she had to get up-to-speed on all of the new benefit provisions for the client, Northwest Technology. With the pressure of training new claims adjusters at three per terminal, while absorbing the material herself in off hours, this training program was obviously faltering.

Fortunately, Stanley, Pogo's Manager of Training & Development, co-opted additional auditing support for Norma but did so at the expense of taking four trained claim approvers away from established processing modules elsewhere in the division. Claim backlogs, increased lag times, and cost overruns were now starting to encumber claim staff and threatening service to existing accounts.

At the same time the senior corporate level, Ozzie, Pogo's Northwest Regional Vice President, was strongly resisting requests from Tim, Seattle's Claim Operations Manager, for more space and resources. As an executive his job depended on containing expenses to meet operating efficiency and make sure that each cost per claim transaction met Pogo's stated objectives by year's end.

"Enough is enough," an exasperated Tim complains to his managers. "We need more accurate projects of our operating expenses, and I am being pressured to reduce expenses even by a greater

percentage next year. This means more work with fewer people while maintaining – or increasing our productivity! While we're training new staff in our Seattle office, I need to accurately project a 2006 budget, while keeping to our zero-base cost increase mandate. I need all of your input, numbers and analyses in ten days!"

Tim reminds his team that "for this year, we have barely been able to maintain our average processing time of 15 days and average cost per claim transaction of \$50. With just four months to go in 2005, we project incurred operating expenses of \$50,000,000 and health-care costs of \$250,000,000 on local revenues of \$300,000,000. Since the only parameters we directly control are our operating expenses, we'll need to run at peak efficiency in 2006 to do any better than break-even." Looking around the room he saw that it sank in – without a miracle many of these people were going to lose their jobs.

In the midst of the current turmoil Pogo's Training Manager Stanley is face with both the "big picture" of corporate needs and his own mandate to get well trained staff in place. He knows he can submit a budget to make a case for additional resources which he thinks it might ease some of the problems that have hampered training. As Manager of Training & Development, he is eager to provide input.

If you were the Training & Development Manager in this situation, consider the following questions:

QUESTIONS

1. What cost factors need to be considered in preparing a budget for the Training & Development area?
2. What areas or people within the organization might be involved before preparing the T&D portion of the budget?
3. What additional data or financial information could be used to develop meaningful information for forecasting training expenditures?

PARTNERING CASE STUDY – PERFECT PLASTICS

Larry closed his computer bag in disgust. This was the third senior level meeting he had attended in the last two weeks where he had not been given an opportunity to speak. Each time he had been on the meeting's official agenda but somehow there never seemed to be enough time to discuss his topic. There was little doubt in Larry's mind that people were paying him lip service. He had had such high hopes. Two and half weeks ago, Dana the new CEO of Perfect Plastics had sent a company-wide memo emphasizing the central role training and development would play in the company's new strategy. Her vision called for the company to grow its product line, diversify its market, and develop a new service arm of the business. Every area of the company would be affected by the changes. Overall the climate at Perfect Plastics was good. Whatever fear and uncertainty people were feeling was counterbalanced by excitement. People were ready to roll-up their sleeves and get to work.

Prior to articulating her vision, Dana asked each department head to develop a list of key recommendations of what he or she felt the company needed to do to successfully execute its new set of goals and objectives. Larry spent two months and many late nights developing his recommendations. This was the opportunity Larry always dreamed about. He and his team were sick of the random, wanton training requests thrown over the wall to the training department. Maybe at last training and development could become a proactive player as opposed to a reactive player. Last year's annual training survey indicated that the organization's level of satisfaction with training was low. Larry faced another obstacle. The department's recent implementation of a Learning Management System was viewed by many of the other functional areas in the organization as an unnecessary expenditure in tight times. In fact, his success in getting the project funded had created a few new political animosities.

During Larry's five year tenure as Director of Training and Development, his quiet, attentive, purposeful demeanor had helped him earn the respect and trust of his employees. However, things were different outside of his department. Larry's sphere of influence within the company was weak at best. What did it matter if he was on Dana's radar screen when no one else would give him the time of day? Larry walked into his office put his laptop down on the conference table and pulled out a yellow pad from his desk. What he needed was a plan for winning the trust and support of the organization. He had lots of great ideas of how his department could make a difference; now he had to find a way of getting the word out.

CASE STUDY DISCUSSION TOOL

<p>Problem Statement</p> <p>Describe the challenge presented in the case study in one or two concise sentences.</p>	
<p>Recommendations</p> <p>Record the recommendations of the group.</p>	
<p>Success Criteria</p> <p>Identify how you plan to evaluate the impact of your recommendations.</p>	

DEVELOPING BUSINESS ACUMEN ACTION PLAN

The three critical skills of business acumen:

1. FINANCE SKILLS

- a. Basic Concepts (balance sheets, income statements, cash flow, etc...)
- b. Budgets
- c. Forecasts
- d. ROI
- e. Ratios
- f. Vendor Management

2. PARTNERING SKILLS

- a. Building Institutional Support
- b. Customer Relationships
- c. Internal Relationships

3. COMMUNICATION SKILLS

- a. Memos
- b. E-mails
- c. Reports
- d. Business Cases
- e. Presentations

1. What skills do you want to strengthen?

2. How can you continue to leverage some of the skills you are strong in?

3. What actions are you going to take do develop the skills you wish to strengthen?



Building Business Acumen:

Business acumen is the collection of knowledge, skills, and experiences that transforms us into indispensable strategic partners in our organization. Professionals are expected to communicate in the language of business. Decision-makers expect to see results from investments made in all parts of the business no matter where you sit. Everyone must be accountable and communicate to management in terms they understand.

Through an interactive and practical approach we will provide people in your organization with the information, tools, and experiential activities to strengthen their business acumen and develop new skills so that they can become key contributors in their organization. Our approach focuses on three areas:

1. Finance Skills
2. Partnership Skills
3. Communication Skills

Objectives:

Upon completion of this workshop participants will:

- Acquire basic business financial skills
- Develop budgets and forecasts for accountability
- Integrate evaluation and ROI measures for management
- Obtain internal buy-in and build internal support
- Manage outsourcing contracts to maximize your input as a strategic driver and minimize HR's role in less critical tactical tasks
- Build partnerships inside your functional area and with customers
- Communicate an effective business message

Features:

This workshop will:

- Work through the basic business financial terminology and required calculations
- Link the results of HR initiatives directly to business strategy
- Demonstrate when to deliver ROI results and how to develop business impact outcomes
- Explore how to create partnerships inside the organization
- Reveal how to manage outsourcing contracts to maximize your role as a strategic driver and minimize its tactical involvement
- Give participants the information, tools, and skills to advocate your role as a key asset to the organization

Workshop Outline (4 day course with all modules):

1. Building A Foundation of Business Skills

- a. Understanding why we need business skills
- b. Reviewing the vocabulary used daily in business
- c. Explaining the different types of financial statements and concepts
- d. Conducting an analysis of your financial results
- e. Communicating with peers and senior managers

2. Understanding Budgets and Forecasts

- a. Differentiating between a budget and a forecast
- b. Interpreting variances on business results
- c. Stepping up to financial forecast
- d. Developing a break-even analysis
- e. Pricing for internal profitability

3. Evaluation & ROI - What it Means to Management

- a. Defining the primary evaluation and ROI techniques
- b. Summarizing what is expected by management
- c. Illustrating results not demonstrated through ROI

4. Developing Internal Support and Buy-in

- a. Identifying key stakeholders and their concerns
- b. Working a real-life role play to an Internal Buying Team
- c. Talking to internal buyers and senior managers

5. Outsourcing and Vendor Management

- a. Surveying outsourcing strategies and their impact on your functional area
- b. Writing a request for proposal (RFP)
- c. Selecting vendors for projects
- d. Managing vendors
- e. Acting as a strategic driver with outsourcing contracts

6. Building Lasting Partnerships with Customers

- a. Examining the top five critical success factors of successful partnerships
- b. Exploring eight strategies for building strong partnerships

7. Developing an Effective Business Case

- a. Articulating objectives for your project
- b. Identifying drivers, needs and impact of the project
- c. Demonstrating the value of a project to the business and analyzing potential risks

8. Capstone Business Acumen Simulation

LEARNING ARCHITECTURE	DESCRIPTION
<ul style="list-style-type: none"> • Integrated Case Studies 	<p>Gather real life examples from WAMU that impact participants' daily responsibilities. Wherever possible customized case studies are developed from WAMU and industry specific materials.</p>
<ul style="list-style-type: none"> • Real-World Workshops 	<p>Our sessions reflect real-world work environments. Through experiential team based activities and flexible learning groups we will be able to deliver true learning results with simulated work environments that reinforce the competencies being taught.</p>
<ul style="list-style-type: none"> • Individual exercises 	<p>Reflective activities done alone by an individual.</p>
<ul style="list-style-type: none"> • Interactive lectures 	<p>Lecture material is covered in an engaging way that includes opportunities for people to participate and contribute.</p>
<ul style="list-style-type: none"> • Discussion groups 	<p>Many of the workshops and individual exercises include small group discussion.</p>
<ul style="list-style-type: none"> • Performance based evaluation 	<p>Participants will be required to successfully complete a capstone simulation. Capstone Simulation – MAKINGSTORIES.net courses end with a performance-based evaluation project. Participants work in teams to solve a problem in a way that demonstrates command and assimilation of course materials</p>



BUSINESS ACUMEN CUSTOMIZATION WORKSHEET

MODULE	YES	NOTES
1. Building Learning & Performance Business Skills		
a. Understanding why T&D needs business skills		
b. Reviewing the vocabulary used daily in business		
c. Explaining the different types of financial statements and concepts		
d. Using the language of finance to communicate with peers and senior managers		
2. Understanding Budgets and Forecasts		
a. Differentiating between a budget and a forecast		
b. Interpreting variances on business results		
c. Stepping up to financial forecast		
d. Developing a break-even analysis		
e. Pricing for internal profitability		
3. Evaluation & ROI - What it Means to Management		
a. Defining the primary evaluation and ROI techniques		
5. Summarizing what is expected by management		
6. Illustrating results not demonstrated through ROI		
4. Developing Internal Support and Buy-in		

a. Identifying key stakeholders and their concerns		
b. Working a real-life role play to an Internal Buying Team		
c. Talking to internal buyers and senior managers		
5. Outsourcing and Vendor Management		
a. Surveying outsourcing strategies and their impact on your area		
b. Writing a request for proposal (RFP)		
c. Selecting vendors for your project		
d. Managing vendors		
e. Acting as a strategic driver with outsourcing contracts		
6. Building Lasting Partnerships with Customers		
a. Examining the top five critical success factors of successful partnerships		
b. Exploring eight strategies for building strong partnerships		
7. Developing an Effective Business Case		
a. Articulating objectives for your project		
b. Identifying drivers, needs and impact of the project		
c. Demonstrating the value of the project to business and analyzing potential risks		
8. Customized Business Acumen Simulation		

SOME QUESTIONS TO REFLECT ON...

What are some of the major initiatives folks are going to be touched by over the next year?

What artifacts at this point exist for any of these strategic initiatives? (e.g. budgets, pro forms, communications to employees, PowerPoint presentations, project plans, strategic plans, history around the drivers for the initiative, impact analysis, stakeholder analysis, results of internal focus groups, etc...)

What project management methodologies or life cycles do you follow? Are there any standards?

What purchasing processes do you follow? What are the forms/templates used for these? How have any of these impacted your projects in the past?

What initiatives would people love to see put in motion? Why haven't these initiatives gotten any traction?

What are the top three greatest challenges your functional area faces this year and next?

Describe a few recent examples/instances/experiences/stories where stronger business acumen would have helped you?

With stronger business acumen how will the role and interactions of folks within your functional area be different?

Are there any other goals or objectives you would like to see achieved during or as a result of this workshop?

What People Are Saying About the Book This Course Is Based On...

“Relevance is in the eye of the beholder. And for training professionals who want to earn a seat at the strategic planning table, nothing can help build corporate relevance better than applying the skills outlined in this book which will show you how to turn training into business results.” **Marty Fisher, vice president, Stores HR and Training, Abercrombie and Fitch**

“This book admirably fills a serious gap in the professional practice of learning and performance -- lack of business savvy. It is clearly written, case-based, concrete and comprehensive. I especially appreciated the financial and return-on-investment content. I was also delighted that it contains material on Human Performance Technology. I will recommend this volume to my students, colleagues and corporate clients.” **Harold D. Stolovitch, emeritus professor, Université de Montréal, principal, HSA Learning & Performance Solutions LLC, and author *Telling Ain't Training* and *Training Ain't Performance***

“This engaging book is absolutely essential for human resource professionals! It should be required reading for everyone in our field.” **Jill Russell, principal and founding director, TPO HR**

“Some of the jewels of this book are it explains the language of finance; it provides practical advice on how to communicate the case for investing in development initiatives, and it is full of guidance on how to collaborate with the business to determine the payback of investing in development solutions. The case studies used throughout the book brings ideas to life in an exciting way. This is one of those books every HR, HRD, and training professional should have.” **Judith A. Hale, author, *Outsourcing Training and Development: Factors for Success***

“If today’s aspiring Learning professionals don’t read this book, they will miss an opportunity to gain that ultimate competitive advantage that will revitalize their career into becoming a true business player. The primer on financial tools, business partnering and dynamic communication strategies described in this book are excellent. The book has integrated a number of innovative learning concepts, tools and methodologies that weave a comprehensive business learning roadmap for Learning professionals to attain greater business acumen and be on top of their game.” **Francesca Bleck, director, human resources, Technical Learning & Development, Lafarge North America and Latin America, Corporate Technical Services**

“Changes in our industry have revealed the critical need for knowledge and skills in business acumen---the area Business Acumen for Trainers specifically and uniquely addresses. This is a must read book for anyone in a training position today or in the future.” **Wes Parker, national curriculum manager, Management & Employee Development, Verizon Wireless**

ABOUT MAKINGSTORIES.net/Project Lead & Facilitator

Terrence L. Gargiulo

Terrence Gargiulo has been helping people working in HR, acquire the skills they need to be a significant contributor to the business for over 15 years. Highlights of some of his past and present clients include, GM, DTE Energy, Federal Reserve Bank, Countrywide Financial, Microstrategy, Dreyers Ice Cream, UNUM, Bank of America, US Coast Guard, Boston University, Raytheon. City of Lowell, Arthur D. Little, KANA Communications, Merck-Medco, Coca-Cola, and Cambridge Savings Bank.

Terrence is an 8x author, international speaker, organizational development consultant and group process facilitator specializing in the use of stories. He holds a Master of Management in Human Services from the Florence Heller School, at Brandeis University, and is a recipient of Inc. Magazine's Marketing Master Award. The 2008 Asia Pacific HRM Congress is awarding Terrence with an HR Leadership Award for his research and contributions to the field.

Terrence's books include, *Making Stories: A Practical Guide for Organizational Leaders and Human Resource Specialists* (translated into Chinese), *The Strategic Use of Stories in Organizational Communication and Learning*, *On Cloud Nine: Weathering Many Generations in the Workplace* (translated into Korean, Spanish, and Japanese), *Stories at Work: Using Stories to Improve Communications and Relationships*, *Building Business Acumen for Trainers: Skills to Empower the Learning Function*, *Once Upon A Time: Using Story-Based Activities to Develop Breakthrough Communication Skills*, *Trainers' Portable Mentor (Spring 2008)*, *Into the Land of Difficult People: 24 Timeless Tales Reveal How to Tame Beasts at Work (Spring 2008)*.