



WORKSHOP BASED ON OUR BOOK - *“Building Business Acumen for Trainers: Skills to Empower the Learning Function”*

**A Customized Learning Solution That Can Be Tailored For Any Corporate Audience/Industry
An Example for An HR Audience...**

Business acumen is the collection of knowledge, skills, and experiences that transforms us into indispensable strategic partners in our organization. HR 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 and HR is no exception. HR must be accountable and communicate to management in terms they understand.

Through an interactive and practical approach we will provide HR professionals 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 HR’s input as a strategic driver and minimize HR’s role in less critical tactical tasks
- Build partnerships inside HR and with customers
- Communicate an effective business message for HR

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 HR’s role as a strategic driver and minimize its tactical involvement
- Give participants the information, tools, and skills to advocate HR’s role as a key asset to the organization

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Workshop Outline (4 day course with all modules – Shorter Versions Available):

1. Building A Foundation of Business Skills

- a. Understanding why HR needs 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 HR
- 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 clients that impact participants' daily responsibilities. Wherever possible customized case studies are developed from clients 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 HR		
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 HR 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 formas, 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...)

Do HR projects follow any project management methodologies or life cycles? Are there any standards?

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

What HR 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 HR group faces this year and next?

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

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

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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**

REFERENCES AVAILABLE UPON REQUEST

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GETTING RESULTS WITH BREAKTHROUGH COMMUNICATION SKILLS

DESCRIPTION

With the pace of work in today's organizations, are you using your communication skills to get the results you want?

Breakthrough communication obliterates barriers and puts us in touch with ourselves and in connection with others. This foundational course looks at the key communication skills we all possess and can strengthen for thriving at work and in our personal relationships. Based on research with Fortune 500 companies, participants are introduced to nine key communication skills that will drive new results in their organization regardless of where they sit.

YOU'RE A NATURAL COMMUNICATOR!

You're committed to becoming a better communicator. Do you know that you have a perfect set of skills for communicating effectively already?

You're trying to build stronger working relationships. Do you use your listening skills to connect more meaningful with others?

You're frustrated because people do not listen to you. Do you have a hard time getting your ideas heard or understood?

You're tired of endless misunderstandings and conflicts. Do you clash with others when you are faced with ideas and positions different from your own?

You're not recognized in your organization. Do you fail to get the feedback and recognition you deserve?



How You Will Benefit

- Discover your natural communication skills and start putting them to work
- Build stronger and quicker working relationships
- Convey your thoughts, ideas, and feelings with clarity, confidence, and sincerity
- Process verbal information with greater speed and accuracy
- Reduce confusion, frustrations, and misunderstandings when communicating with others
- Negotiate differences with poise and openness
- Work more collaboratively with others to achieve better results
- Increase your visibility and respect in the organization by strengthening your listening skills
- Reduce reactive and negative exchanges with others
- Maximize your awareness and sensitivity to others and your environment

What You Will Cover

Maximize the Communication Skills You Already Have

- Develop awareness of the nine communication skills we all possess
- Measure the degree to which you are currently using these skills
- Practice techniques for strengthening these skills
- Work with a large collection of self-development activities to keep your skills honed

Strategies for Taking in Verbal Information

- Break verbal communications into three channels of information (content, emotion, intention)
- Increase powers of observation
- Engage people communicating with you to increase your understanding

Techniques for Interpreting the Information You Hear

- Create a mental picture of what you hear
- Relate what you hear with your experiences
- Sort through the interpretations you generate from listening to others
- Draw more reliable conclusions to guide your response to others and interactions



Communicate with Clarity, Confidence, and Sincerity

- Selecting the right words
- Finding good experiences and examples to share with others
- Hear what you will say before you say it
- Use compelling language and examples to paint a vivid picture of what you want to communicate
- Speak with your actions as well as your words

Developing Your Action Plan

- Make a commitment to try at least two new strategies in the work place
- Write a learning plan to continue developing your communication skills
- Select a goals partner from the course to check-in with on a regular basis for peer support and feedback

SKILL	DESCRIPTION
1. Telling	<p>Relaying information with authenticity. Paint a vivid, engaging picture for listeners.</p> <p>Some examples...</p> <p><i>I use anecdotes when I communicate.</i></p> <p><i>I vary the tone and volume of my voice when I communicate.</i></p> <p><i>I allow others to interject their own thoughts and experiences during a conversation.</i></p> <p><i>I invite my listeners to interact with me by adding details, anticipating the direction of the conversation, and contributing comments.</i></p>
2. Selecting	<p>Picking words that are appropriate to the context of a situation to clearly communicate experiences, concepts, ideas, or feelings.</p> <p>Some examples...</p> <p><i>I can always find a relevant experience to share.</i></p> <p><i>The experiences I share add to the conversation.</i></p> <p><i>I can find experiences to share that communicate who I am.</i></p> <p><i>I can find experiences that resonate with my listeners.</i></p>
3. Modeling	<p>Employing a variety of analogical techniques to bring an idea or concept alive. Being aware of ones actions and using them to create lasting impressions in the eyes of others.</p> <p>Some examples...</p> <p><i>I spontaneously use or create analogies to help people connect with me or with the information that I am sharing.</i></p> <p><i>I make room for back-and-forth exchanges in communicating with others to jump start the generation of new meaning.</i></p> <p><i>I acknowledge others for the contributions they make.</i></p> <p><i>I validate others' experiences.</i></p>
4. 4. Listening	<p>Invoking the imagination to enter a tellers' point of view in a deep way.</p> <p>Some examples...</p> <p><i>I paraphrase the statements of others as a way of confirming what they are communicating to me.</i></p> <p><i>I paraphrase the statements of others as a way of validating what they are communicating to me.</i></p> <p><i>I ask questions to clarify that I am accurately hearing what others are saying.</i></p> <p><i>I ask follow-on questions to better understanding information that is being communicated.</i></p> <p><i>I refrain from making premature decisions about the value, importance, or quality of another person's experience.</i></p> <p><i>I try to see situations and experiences from the eyes of others.</i></p>

<p>5. Observing</p>	<p>Practicing mindfulness to become aware of the implicit meaning in other people's words and actions.</p> <p>Some examples...</p> <p><i>I care about the success of the people around me.</i></p> <p><i>I have a strong sense of my own strengths.</i></p> <p><i>I have a strong sense of my own weaknesses.</i></p> <p><i>I am sensitive to the energy, moods, and thoughts of others.</i></p> <p><i>I purposefully review the details of my interactions with others.</i></p>
<p>6. Eliciting</p>	<p>Asking effective questions. Finding ways to draw out meaningful and relevant information from others.</p> <p>Some examples...</p> <p><i>I encourage others to share their personal and professional experiences.</i></p> <p><i>I seek to create a climate of sharing.</i></p> <p><i>I am willing to be vulnerable with others.</i></p> <p><i>I tell my experiences to others in ways that encourage them to be open with me.</i></p> <p><i>I help others to recall their experiences by rephrasing questions.</i></p> <p><i>I help others to recall their experiences by mirroring their language.</i></p>
<p>7. Reflecting</p>	<p>Reviewing experiences with circumspection and extracting knowledge from them.</p> <p>Some examples...</p> <p><i>I review my experiences to learn from them.</i></p> <p><i>I relive the thoughts and emotions of my experiences.</i></p> <p><i>I consider my experiences without judging them.</i></p> <p><i>I consider my experiences without interpreting them.</i></p> <p><i>I am open to learning from my experiences in new and different ways.</i></p> <p><i>I consciously work to understand my experiences in as many ways as possible, which results in a rich variety of insights.</i></p> <p><i>My current actions are influenced by my insights.</i></p>

<p>8. Synthesizing</p>	<p>Finding familiar patterns of information in new experiences and creating connections between them and old ones.</p> <p>Some examples...</p> <p><i>I see interrelationships between all of my experiences.</i></p> <p><i>I make sense of new situations by actively searching and extracting knowledge from previous experiences.</i></p> <p><i>I use my experiences to develop new and lasting wisdom.</i></p> <p><i>I use other people's experiences to develop new and enduring wisdom and insight.</i></p> <p><i>I connect my insights from one domain of activity to another.</i></p> <p><i>I search my mind for similar past experiences to help me make sense of novel situations.</i></p> <p><i>I search my mind for previous experiences to help me to see new and different possibilities in present situations.</i></p>
<p>9. Indexing</p>	<p>Developing a flexible, vast, mental schema for retrieval of experiences, and knowledge.</p> <p>Some examples...</p> <p><i>I find myself thinking about what I learned from my experience.</i></p> <p><i>I can identify life experiences that have contributed to the development of my values, beliefs, and attitudes.</i></p> <p><i>I am aware of my values, beliefs, and attitudes and how they shape my understanding of new information and experiences.</i></p> <p><i>I share past experiences with others to help them understand my worldview.</i></p> <p><i>I reflect and assess situations as they are occurring.</i></p> <p><i>I review with circumspection my interpretations of what I hear and see around me.</i></p>



INNOVATION

Course Description...

This two day experiential workshop provides participants with tools and techniques to tap into the creativity of themselves and others. Participants will discover how to design group processes that encourage exceptional brainstorming and effective analysis of the ideas generated. Participants will learn how to scale these processes so they are applicable in a variety of settings and time constraints. Participants will learn how to cultivate and leverage diversity to encourage out of the box thinking and collaborative decision making.

Course Objectives...

- Facilitate effective brainstorming.
- Project how potential ideas may play out.
- Create breakthrough strategies and plans.
- Determine the processes necessary to get things done.
- Make connections among previously unrelated notions.
- Promote open expression of ideas and opinions by encouraging different perspectives and listening to diverse points of view.
- Manage the creative process of others.
- Articulate credible visions of possibilities.
- See opportunities for synergy and integration where others cannot.

Materials....

Book: A Whack on the Side of the Head, by Roger von Oech

Cards: Creative Whack Pack, by Roger von Oech

Your Imagination

Each Other

and...your Facilitator



COURSE AGENDA

- I. Introduction – “So why are we here?”
 - a. Ground Rules
 - b. Objectives
 - c. Capturing Our Brilliant Ideas & Notes as We Go

- II. Index Card: How do you define innovation?

- III. Getting to Know Each Other (Group Intros)
 - a. Name
 - b. Role
 - c. Professional Achievement You Are Proud Of
 - d. Describe Yourself in One to Three Words
 - e. What does innovation look and feel like in your role at the bank?
 - f. Hopes and expectations

- IV. Index Card: 3 Obstacles to Being Innovative at the Bank
 - a. Write them down for yourself
 - b. Trade cards with other groups
 - c. Get back into your groups and select the best five – write them in order of importance from 1 to 5 where 1 is the most important

- V. A Whacky Moment – Working with the Book & Cards

- VI. Techniques for Running Brainstorm Sessions
 - a. Architecting a Group Process
 - i. Anonymous vs. open
 - ii. Individual vs. Team
 - b. Time Boxing
 - c. Clarifying Ideas
 - d. Combining/Consolidating Ideas
 - e. Advocating
 - f. Eliminate
 - i. Straw Poll
 - g. N/3

- VII. Brainstorm Simulation

Leading a Brainstorming Session

Your business area has been asked to design FRB's new universal communications device. This is the ideal all in one device to replace all other communication tools at the bank and help people do their



jobs more effectively. This is a brainstorming session intended to collect people's ideas and select the five most important features.

Part 1: Class Discussion

Discuss a group process for how to best run the brainstorming. Determine time frames for each part of the process. Assign the roles of:

2 Facilitators (1/2 way through the process facilitator two will take over)

Scribe

2 Observers

Participants (everyone else acts as a participant)

Part 2: Brainstorming

Following whatever group process is designed participants brainstorm.

Part 3: Prioritization of Ideas

Following whatever group is designed participants prioritize ideas.

Part 4: Debrief

Start with impressions of observers and then debrief the group at large.

VIII. Grab Bag of Innovative Activities

1. Concepts Made Easy

Shows people how to communicate complex concepts, thoughts, feeling, and ideas through stories by increasing their sensitivity to other people's language and knowledge and utilizing analogies and metaphors.

2. Magic Three

Three inter-related stories provide a structured activity to guide people through an experience of reflection, practice authentic communication, and create a connection with listeners.

3. Mirror

Difficult and contentious conversation topics are used to communicate diverse perspectives with stories, practice entering other people's frame of reference, and generate out of the box thinking.

4. Random Conversation

Newspaper and magazine articles are used to help people experience how stories can be triggered by any stimuli, practice selecting relevant experiences to share when communicating, and develop the ability to scan new information and find personal connections.



5. Relic

Significant personal objects are used to create a safe and fun vehicle for people to share something personal, use an object to trigger stories, and gain insight into stories that have had a formative impact on us.

6. Stories in Words

Mission statements are used to trigger stories and connections, increase awareness of how words can be used to index stories, and encourage associations and linkages between people and ideas.

7. Story Collage™

A specially designed brainstorming tool for stories is used to help people discover and organize their stories, reflect on stories and look for relationships between them, and promote dialogue, sharing, and learning from each other's stories.

8. Three Channels

Communication is broken down into three channels to develop stronger active listening skills, synthesize information from multiple channels to draw conclusions and guide communications with others, and connect with others on a deeper and more fundamental level.

VIV. Day One Debrief

IX. Working Groups – Tackle List of Obstacles from First Day

X. Whacky Moment

XI. More Grab Bag Activities

XI. Individual and Group Action Planning with Goal Partners

Capture group takeaways (these are things not only learning during the course but group commitments – things people will do differently).

Individuals write one or two personal goals. They are assigned a goal partner to share the information with and given a follow-up date to check-in with them.



PROJECT LEADERSHIP: BUILDING HIGH PERFORMANCE TEAMS

COURSE DESCRIPTION

Participants will learn how to maximize their technical skills as project managers by developing their leadership and team building skills. Through discussions, self-assessments, role-plays, simulations, and case studies participants will walk away with concrete strategies for how to build and maintain multiple, high performance project teams. Participants will experience techniques for building trust, exercising authority, working with geographically dispersed teams, handling conflicts, negotiating differences, managing diverse styles on a team, and navigating political constraints with tact and ease.

YOU WILL LEARN HOW TO

- Build and lead highly motivated teams
- Manage multiple projects
- Work with geographically dispersed teams
- Navigate political aspects of leading projects
- Handle project conflicts
- Negotiate differences
- Find breakthrough solutions
- Deal effectively with project conflicts

WHO SHOULD ATTEND

Program managers or project directors interested in sharpening team leading and team building competencies. This course will be of great value to leaders and managers looking for concrete strategies for managing multiple projects, working with geographically dispersed teams, negotiation techniques, conflict resolution and managerial skills rather than the technical skills of project management. [This course is appropriate for anyone - at all experience levels - who needs to build relationships and work with others to achieve outstanding results in a project environment.](#)

COURSE OUTLINE

Course will be designed in a modular fashion. After opening remarks (standard course opening) and introductions (done as interviews) participants will complete a self-assessment survey. This survey is key to the course since it will set its direction and topics. Through an individual and group prioritization process participants will determine which modules are covered in the course. There are two areas of questions on this first assessment instrument:

1. As a project leader...Where are you now? Where do you want to be? What will be the impact?

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2. Self rating of key competencies that map to course modules

Instructor will project a spreadsheet and enter participants' data. Using the data as a guide, instructor will model a team decision making process and facilitate a prioritization of course modules.

MODULE 1: Assessing the Situation (see description above)

MODULE 2: Intra-personal Skills

Self-reflection and analysis is one of the keys to effectively working well with others and leading teams composed of different personalities and communication styles. Using a variety of interactive techniques, and discussions participants will recognize their strengths, weaknesses, and leadership style.

MODULE 3: Interpersonal Skills

Projects are all about working well with others. Participants take an objective look at their strengths and weaknesses on an interpersonal level. Assessment surveys, role plays, and simulations are used to identify key interpersonal competencies. These competencies include but are not limited to: (active listening, emotional intelligence, relationship building, adapting an appropriate communication style, reading body language, rapport building, managing expectations, and coaching).

MODULE 4: Key Roles of a Project Leader

A project leader needs to wear many different hats. Putting on the right hat at the right time is a skill that can be practiced and cultivated. Project Leaders will find themselves acting as advocates, leaders, facilitators, coaches, and negotiators. This module explores each of these roles and allows participants to experience the various roles and identify strategies for using them effectively.

MODULE 5: In & Out & All Around the Box – Finding Breakthrough Solutions

Solving issues that come up and finding new ways of addressing constraints and challenges that inevitably arise during a project is an essential skill for both the project leader and team. During this module participants explore how to look for the critical point in a system or root cause, how to leverage some proven problem solving techniques, and how to engage their teams in identifying “creative breakthrough” solutions.

MODULE 6: Political Persuasion

Project leaders operate in organizations governed and constrained by political influences. Building commitment, managing expectations, winning support, finding compromises, and navigating the myriad of

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relationships and forces is a full time job. During this module students learn some tried and true methods for working with political power and increasing their powers of persuasion in an organization.

MODULE 7: Running Project Team Meetings

Meetings need to be more than a time consuming ritual. Running project meetings well is paramount to the success of a project and the smooth communication between team members and all constituents. Participants practice effective meeting techniques and write a plan for how they will improve the quality and results of project meetings in their organizations.

MODULE 8: Techniques for Juggling Multiple Projects

Rarely these days is a project leader focused on just a single project. Managing multiple projects with competing resources, funds, and time can create a stressful and difficult work environment. In this module participants explore a variety of strategies for coping with the challenges of leading multiple projects. The role of delegation and “just enough” and “just in time” communication are discussed and demonstrated as two central approaches to juggling multiple projects.

MODULE 9: The 4th Dimension – Managing Geographically Dispersed Project Teams

Scope, time, and funding are the classic triangle of variables controlled by a project leader. However, today project leaders need to work with one more variable: geographically dispersed project teams. Participants examine case studies and discuss best of breed processes for managing project teams with geographically dispersed members.

MODULE 10: Using the Right Metric at the Right Time

Projects can be inundated with lots of data. Identifying the right metrics, how to find them, where to find them, and focusing on the right metric at the right time is the only weapon a project leader has to combat the onslaught of information. Participants practice working with metrics and deciding on what metric is needed and at what point to guide a project team back on course.

MODULE 11: Floods and Fires

Project leaders spend a great deal of time putting out fires. Learning how to handle crises with poise, resolve, and patience are the marks of a great leader. Strategies for coping with stress and effective techniques for multitasking will be discussed. Participants will gain insights into how they can become proactively reactive when under fire.

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MODULE 12: Project Conflicts

Where there are people there are bound to be conflicts. This module teaches project leaders how to negotiate differences, and handle conflicts that naturally arise as a function of working on teams. Conflict is shown to be healthy and even desirable occurrence if it is used as an opportunity to strengthen a team's relationships, understanding, and diversify its perspective.



TITLE: Return on Experience (ROE): Leveraging Your ROE for Results – 2 Day Course

DESCRIPTION

Leave no experience unturned. This course will show you how to get a return on experiences (ROE). Our experiences are not just nice to have; nor is thinking about them a luxury. Our experiences motivate, drive, and guide all our behaviors and reactions. You will learn and practice research proven techniques for transforming your experiences, and the experiences of others into assets by making better decisions, avoiding past mistakes, and enter new situations with better knowledge and confidence. Participants work with concrete tools for developing the essential skills they need in order to get an ROE and achieve results.

HOW YOU WILL BENEFIT

- Discover how to tap into your wealth of experiences
- Review your experiences with an open mind
- Conduct a critical analysis of your experiences
- Transform your experiences into nuggets of knowledge that will guide future actions
- Avoid making the same mistakes
- Leverage your instincts by increasing your awareness of how you form gut opinions
- Make better decisions more quickly and with less information
- Improve your working relationships by being more sensitive to eliciting the experiences of others and learning from them
- Become more proactive versus reactive in your relationships with others
- Implement easy to facilitate group practices for extracting lessons learned from projects

WHAT YOU WILL COVER

Get A Return on Your Experiences (ROE)

- Examine why your experiences are so important to achieving better results
- Discover the potential of tapping into your experience

Tap Into Your Experiences

- Work with new techniques for quickly remembering your experiences
- Replay these experiences in your mind to vividly relive them

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Review Your Experiences

- Examine your experiences with an open mind
- Look for the relationships between your past experiences and your current attitudes, values, biases, beliefs and assumptions



Objectives: Customized experiential workshop to enhance the consultative listening skills of internal and external consultants.

Description of Workshop (Suggested Time: 9:00am – 5:30pm):

Activity	Description	Instructional Method	Time
Introduction	Objectives, ground rules, expectations, activities	Interactive lecture	15 minutes
Group Discussion	Group brainstorm – “What is consultative listening?”	Group discussion	30 minutes
Small Group Discussion	Work in small groups and capture experiences of past success and failures of consultative listening during client engagements	Small group	45 minutes
BREAK (15 minutes)			
Debrief	Debrief small group discussions – highlight key learning and best practices	Group discussion	30 minutes
Lecture	Explain framework/model of consultative listening	Interactive lecture	30 minutes
Self-Assessment Tool	Measure consultative listening skills with a self-assessment instrument, score the assessment, and discuss results	Instrument	30 minutes
LUNCH (1 hour) 12:15-1:15			
Video	Video vignette illustrating consultative listening skills	Video and discussion	40 minutes
Case Studies	Work in teams to discuss case studies and devise strategies based on consultative listening principles	Small group work	50 minutes
BREAK (15 minutes)			
Debrief Case Studies	Group discussion to debrief case studies	Group discussion	30 minutes
Simulations	Situational simulations and role plays to practice techniques	Role plays	60 minutes
BREAK (10 minutes)			
Action Plans	Individuals develop a simple action plan and self-development plan	Individual work	15 minutes
Debrief Action Plans	Identify common elements in people’s action plans. List three high level measurement and evaluation criteria for tracking the impact of new consultative listening behaviors.	Group discussion	20 minutes
Wrap-Up	Workshop evaluation and next steps	Evaluation	5 minutes

Post Session – Follow-up coaching calls with participants 2 months later

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JOINT APPLICATION DEVELOPMENT (JAD): The Art & Science of Collaborative Success

Learning Methods

- 1. Discussion/Interactive Lecture** – Participant collaboration is used to elicit people’s experiences and relate to core topics to be covered (case studies, large group discussions, and small group discussions)
- 2. Skill Builders** – Workshops and activities are used to practice skills and get feedback.
- 3. Simulation** – Participants are immersed in an experiential simulation that leverages Client specific material and combines new and practiced skills. Peer and instructor feedback are used to reinforce performance improvement opportunities.

Day 1: Knowledge and Skill Building

Module 1: Self-Assessment*

Students self-assess their understanding and interest in a variety of JAD topics with a short survey. Topics are clustered into modules with time estimates attached to them to allow for seamless customization. In real-time (utilizing an Excel spreadsheet to analyze the responses from the survey) instructor models group collaboration by facilitating agreement on what modules to cover during the workshop.

Module 2: Session Definition

Topics include – selecting your JAD team, working with the business, articulating project assumptions and risks, conducting interviews with stakeholders

Example Skill Builder: Interviewing Stakeholders

Module 3: Research

Topics include – understanding business imperatives, thinking like the business owners and stakeholders, documenting business processes, documenting data requirements, writing a JAD session agenda

Example Skill Builder: Writing a JAD Session Agenda



Module 4: Preparation

Topics include – preparing documents, developing visual aids for meeting, selecting models to use during the meeting, preparing JAD attendees, design of meeting space, checklist of materials, tools to use during

Example Skill Builder: Developing Visual Aids/Selecting Models to Use in JAD Session

Module 5: The Session

Topics include – running the agenda, setting ground rules, taking notes, time boxing, reviewing key artifacts with group (screen mockups, data flows, business rules/business processes), open issues and parking lots, evaluating and debriefing session

Example Skills Builder: Handling Open Issues, Debriefing Session

Module 6: Post Session

Topic include – communication to stakeholders, writing the session document, reviewing and approving the document, follow-up, managing expectations, handling moving requirements

Example Skills Builder: Analyzing a Session Document

Module 7: Facilitation Techniques

Topics include – brainstorming and creative thinking, time boxing, handling difficult dynamics, negotiating differences, eliciting participation from all attendees, collaborative decision making, consensus building, maintaining agility with focus and structure, creating an ethos for the group, active listening skills, managing uncertainty and ambiguity with a group

Example Skills Builder: Brainstorming and Collaborative Decision Making, Active Listening Skills

DAY 2: JAD SESSION SIMULATION

Module 8: JAD Session Simulation*

Utilizing the knowledge and skills of day one (as well as ones not yet discusses), participants are immersed in an experiential simulation that leverages Client specific material and combines new and practiced skills. Peer and instructor feedback are used to reinforce performance improvement opportunities.

NOTE: Every module includes tip sheets, best practices, and a skill builder activity. Most modules include either a case study or role and whenever possible these are developed from Client materials/information/artifacts provided to me.

*** Required Modules**

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