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LEADERSHIP TRAINING RESOURCES GUIDE
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HR.com is in business to help build great companies by connecting them to the knowledge and resources they need to effectively manage the people side of business.
INTRODUCTION

Welcome to HR.com’s Leadership Training Resources Guide. This guide will help you assess your leadership training needs and inform you of leadership training programs that are available to help build great leaders at all levels in your organization.

This resources guide is divided into four distinct sections. Section I takes a brief look at leadership philosophies and some principles for success. It examines how and why leadership training is an important part of the leadership development process. We make some recommendations on how to structure the leadership training process, beginning with needs assessment and ending with evaluation of results. The leadership-training vendors who participated in this Resources Guide have been segmented to help you make some sense of the industry. Also, there are suggestions on criteria you can use in evaluating vendors and their offerings. An introduction is provided to the categories and terms used in Sections III and IV. Along the way you will find questions in italics that you can use to launch discussions to clarify your organization’s perspective on leadership training and development.

If leadership training doesn’t lead to improved performance, it is a waste of time and resources. Reinforcement and follow-through are essential if learning is to be transferred to the job. In Section II, we provide brief information on three electronic performance support systems that focus on providing “just in time” learning and reinforcement on leadership topics. In the area of follow-through, we provide profiles of two online follow-through management tools that can help learners focus on and track their progress as they apply their new knowledge, skills and behaviors back on the job.

Section III contains organizational profiles from 28 leadership-training vendors. The vendors include top business school Executive Education departments, large corporate training vendors and some small leadership training boutiques. These 28 vendors have provided 187 leadership training program summaries, all of which are included in this section. This Guide includes leadership training delivered via live classroom instruction, e-Learning and through a blended approach. A few stand-alone leadership-training products are profiled as well.

Section IV provides a series of 16 tables to help you easily identify leadership-training solutions for your organization based on the primary leadership competency they address, and the primary management level(s) for which each program is designed.

In addition, there are profiles of several organizations that exclusively custom-design leadership training to address specific client needs. We focused only on vendors headquartered in the United States; however, we have identified the languages and countries in which each solution is offered.

While this guide is not exhaustive in its review of leadership programs, it does offer valuable information on resources available to assist you in building stronger leaders throughout your organization. We encourage you to pass it around to other individuals who are involved in leadership development, in addition to the leaders themselves.
WHAT THIS RESOURCES GUIDE DOES NOT DO
There are many ways to develop leaders. The scope of this report does not allow us to explore all avenues. We have focused on formal leadership training provided through vendors. We have not included adventure-based programs or formal degree-granting business programs such as MBAs. One-on-one coaching is also excluded, unless it supports a specific training intervention and is therefore part of a blended learning solution. Also, there have been no attempts to rate the vendors or programs; we do however provide general information on what contributes to leadership training’s success in building great leaders.

Section I – Introduction to Leadership Resources Guide
To begin, we will highlight some important leadership principles and leadership philosophies currently operating in business today. This is a chance for you to clarify and confirm your organization’s orientation to leadership and leadership development, which will impact the ways in which you provide learning opportunities to your leaders.

What makes an effective leader? Ask 100 people this question and you are likely to get at least 50 different answers. It is a complex issue at best. There is no universally accepted model of great leadership or of leadership development. Based on our research and our discussions with thought leaders on this subject, a few things do seem to be clear, in the midst of all the uncertainty.

OBSERVATIONS OF LEADERSHIP EFFECTIVENESS
1. Great Leaders Make A BIG Difference
This has been statistically demonstrated in countless studies. Jack Zenger and Joe Folkman in their book *The Extraordinary Leader*, do a nice job of summarizing their findings, based on analyses of thousands of feedback instruments and correlating them to business metrics. A very clear relationship was demonstrated between managers who were perceived as “great” and the associated employee commitment rates, turnover rates, customer satisfaction scores, and profitability of their divisions. What this research also demonstrated was that managers who scored in the middle (30th to 70th percentile) compared to their peers had little to no impact on the business metrics. The ‘mediocre middle’ did little to affect business performance.1

What’s the learning here? One of the clear indications of this research finding is the strategic value of moving managers who currently rank as average or good into the “great” zone. And, the good news, based on this research, is that it doesn’t take becoming great at everything. Just being perceived as “great” in three leadership competencies was enough for good managers to move into the zone of perceived “greatness”. 2 The resulting impact on business metrics is dramatic.

*Question:* What percent of your leaders are ‘great’ relative to their peers? What impact do these leaders have on your business, compared to your other leaders?

2. Leaders Need To Build On Their Strengths And Shore Up Critical Deficiencies
The Positive Psychology Movement, The Appreciative Inquiry Movement, The Gallup Organization and Zenger Folkman, among others, have long engaged in the discussion about whether learning should be focused on addressing weaknesses or building on strengths. In discussions with several senior Leadership Development executives, coaches, and vendors who have done research in this area, there was consistent
support of the idea that building on what a leader already does well can generate tremendous return.

People are easily motivated to pay attention to what is already working for them and make it even better. Finding increased opportunities to use one’s strengths is a very effective place to start in the design of a leader’s development plan.

In the research that Zenger Folkman did on ‘great’ managers, lack of weaknesses was not what distinguished the great from the good or low-performers. It was the presence of a few profound strengths. So often, we look to raise our low scores on our assessments, instead of looking at what we excel in naturally, and leveraging that capacity further.

On this topic of leveraging what one already does well, Zenger Folkman have come across one of the truly ‘new’ insights on leadership development that we have encountered recently. What they discovered was that once a person is already reasonably proficient in a competency area, a different approach to development is required, a non-linear approach. They identified statistically significant correlations among their 16 differentiating leadership competencies and a number of supporting behaviors. They call these “competency companions.” An example of this would be a leader who is already rated as ‘good’ at relationship building. If she wants to move this competency from good to great, she will have more success by focusing on one of the seven competency companions associated with relationship-building than by trying to simply do more of a good thing. The competency companions for relationship building include: providing recognition and praise, career development, teamwork and collaboration, personal integrity, inclusion and managing diversity, listening and optimism. In this instance, this manager may achieve success through increasing the frequency with which she provides recognition and specific praise to her employees and peers.

We’ve heard the argument that strengths - when overused - can become weaknesses. Jack Zenger has this to say about that argument. “We saw no evidence of overused strengths in our data. Rather, we saw numerous examples of imbalanced strengths: strengths, that, by themselves, could only take the leader so far.”

This is not to say that no attention needs to be paid to areas of weakness or development opportunities. Much has been written on the subject of leadership “derailers,” behavioral tendencies that can limit a leader’s ability to be successful and are often viewed as the “dark side” of one’s personality.

In fact, Zenger and Folkman have isolated from their data on least effective leaders what they term “fatal flaws”. The five they identified include: Inability to learn from mistakes, interpersonal incompetence, lack of openness to new ideas, tendency to blame others for problems, and lack of initiative.

DDI identifies 11 derailer behaviors in its literature. Described as “fatal personality flaws, which…may knock [leaders] off the track to success,” these behaviors include being: impulsive, risk adverse, imperceptive, arrogant, approval dependent, self-promoting, eccentric, defensive, and volatile. Low tolerance for ambiguity and micromanaging complete their list.
These behaviors may be uncovered through multi-rater feedback, or through an assessment such as the Hogan Development Survey (HDS), which was created for this specific purpose. Given that these behaviors can easily prevent a leader from reaching his or her leadership potential, they need to first be identified, and then acknowledged by the leader. Once they have been acknowledged, the leader will need coaching and mentoring to help work through, and skillfully manage derailers.

Question: How much emphasis does your organization place on leveraging strengths versus raising low scores? What types of development do you make available to leaders who demonstrate the presence of derailer behaviors?

3. Leaders Need To Be Developed At All Levels

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.” John Quincy Adams, 6th U.S. President

In the past, leadership development was often reserved for those in the executive ranks, or on the fast track. The term “leader” is being carefully examined by many thought leaders to expand its meaning to include people at all levels of organizations. This quote by John Quincy Adams summarizes much of the recent discussion about the importance of cultivating leadership qualities in everyone. Amongst other things, leadership is a mindset or perspective, and providing some form of leadership development to individuals at all levels sends a clear message that leadership is valued and encouraged. Many vendors have launched, or are in the process of developing, programs for individual contributors to help them build the skills typically reserved for leaders. DDI, for instance, has developed a framework and training programs targeted to: informal and emerging leaders, people leaders, operational leaders and strategic leaders – all with varying needs for the skills typically assigned to leadership.

Many companies have made increasing their leadership bench strength a strategic priority. Providing leadership development at all levels of an organization increases the pipeline of qualified candidates for the leadership talent pool. Another strong business case for offering front-line leaders training and development is the direct link that has been proven between the effectiveness of a manager and their employees’ job satisfaction, productivity, commitment levels and tenure.

Organizations of the future are predicted to become much flatter, leaner and dependent upon relationships with an extended enterprise of contract workers, suppliers and channel partners. This new structure will require that individuals outside the traditional “manager” title have effective skills for managing groups, projects and effectively influencing action toward a successful outcome. In fact, many futurists go so far as to say that the highly agile organizations of the future will be “leaderless” in the traditional use of the term. Some anticipate that future organizations will operate primarily from self-managing teams and possibly, rotational leadership councils.

Question: What is your organization doing to cultivate leadership at all levels? What impact does your current choice have on developing your leader talent pool?
4. Leaders Are Born and Made
Do some individuals have a natural inclination to lead others? Yes. Can leaders benefit from developing their leadership skills and abilities? Absolutely! Can a person who has no natural inclination to lead others become an effective leader? We suppose anything is possible. However, we support the notion that an individual who is not born with a desire and aptitude toward leading others will not likely enjoy the job. Therefore, we support the philosophy that leaders tend to be individuals with some natural ability, who through a process of self-selection and personal and professional development, can become highly effective. The great debate seems to center more on how a leader acquires what he or she needs to improve.

THE GREAT DEBATE – IMITATION VERSUS TRANSFORMATION
There is a continuum of opinions on what works to develop effective leaders. On the one end, we have a complete and total dedication to imitation of skills and behaviors of other great leaders. On the other end, we have a pure commitment to internal transformation as the only door through which leaders can pass in order to attain greatness.

On the imitation side, we read about the successes of leaders from companies like GE and Southwest Airlines and we are told to emulate their thinking, processes and behaviors. On the transformation side, we are told to engage in extensive reflection and put ourselves in “uncomfortable” situations that stretch us to acquire the wisdom, self-knowledge and strength of character needed to be a great leader. Robert Quinn, in his book, Building the Bridge As You Walk On It, states, “To develop leaders is not about getting them to imitate the thinking and behavior of other people who have been successful. It is about attracting people to the decision of entering the unique state from which their own great thinking and behaviors emanate.”

David Dotlich and his colleagues recently wrote a book called Leadership Passages: the personal and professional transitions that make or break a leader. In this book, they focus on 13 distinct life and career passages that offer tremendous growth and development for leaders. They talk of the importance of developing leaders with a “whole person” view and recognizing the gifts available through adversity. They encourage organizations to find opportunities for leaders to experience both diverse and adverse situations and recommend action learning as a powerful way to stretch leaders to learn. They also emphasize the need for organizations to acknowledge that failure can be life’s greatest teacher and to rethink the notion that success is a linear journey.

Question to consider: How does your organization handle leaders who experience failure? What support do you provide to leaders through transitions? Does your organization support the “whole person” view of leadership development?

We would suggest that effective leadership development efforts incorporate a blend of approaches that include learning from others as well as developing greater self-awareness and wisdom. Learning from others often takes the form of looking at leadership ‘best practices’. Jeffrey Pfeffer, Thomas D. Dee II Professor of Organizational Behavior at Stanford Graduate School of Business made an interesting distinction when he said in a recent conversation, "The value in best practices is often lost. Instead of copying what people (and companies) do, we should learn from, and perhaps emulate, how they think; their mental models and mind sets. Most of the time,
we just focus on what was done. You can't just replicate actions and expect them to be successful."

We've all read stories that have been published on several “great” leaders who moved on to different companies and were no longer successful. One size does not fit all. There is a host of variables leading to success, some of which include organizational culture, stage in the business lifecycle, and mix of competencies in the leadership team. Imitating the actions or behaviors of another leader holds little to no benefit if it doesn’t fit the environment or authentic personality of the leader(s) in question.

Another issue to consider is that different competencies are suited to different types of learning interventions. For a mid-level manager to learn financial acumen, a weeklong program at a University may be the ideal solution for understanding and applying financial data in strategic decision-making.

When we look at the skills associated with self-management and interpersonal relationships, however, a weeklong training program is likely just a launching point for a long-term development plan. What we’re talking about here are the competencies associated with the term coined by Daniel Goleman as “emotional intelligence”.15 We see the need for a combination of multi-rater feedback, new skill/behavior introduction, self-reflection, practice and more feedback. Individual coaching over time can be highly effective as follow-on to formal training when developing these competencies. Improving interpersonal relationships and self-management skills is an area needing improvement for many leaders.

So, different leadership competencies are going to lend themselves to different types of learning interventions. Those associated with emotional intelligence can be some of the most difficult to address, although many organizations are realizing very positive returns from doing so. Below, we’ve provided one such example.

Joseph Grenny and his colleagues at VitalSmart have conducted numerous studies that show that a leader’s ability to skillfully and quickly manage “crucial confrontations” has direct impact on business results. The skills and process for effectively addressing poor performance when it happens, dealing with broken promises or missed expectations, can be learned and the resulting improvements to the business evaluated. After conducting training programs focused on improved confrontation skills, Grenny and his associates have demonstrated business impact such as: 50% improvement in productivity in 12 months with a software development group, 30% improvement in quality in a Telecom company and cycle time reduction of 76% in four months with an IT organization.16

Getting back to this question of imitation versus transformation, we suggest there’s plenty of room for both. Most of the training programs profiled in this Resources Guide place themselves somewhere along the middle range of the continuum. However, we recommend a discussion with vendors about their leadership development philosophy and how it is manifested in each training program. We have included a brief summary of their leadership development philosophies in Section III, where we provide organizational profiles for each vendor.
CURRENT STATE OF LEADERSHIP

Watson Wyatt’s WorkUSA® Surveys evaluate workers’ attitudes towards their leaders. The survey results for 2004 found that 51% of employees have trust and confidence in their senior management. This is compared to 44% of employees surveyed in 2002. Still, there is a long way to go. 50% of workers in the 2004 survey said they believe the information they receive from management versus 37% in 2002. Nice increase, and yet, lots of room for improvement. Imagine yourself as a leader knowing that only one in two of your employees believes what you say.

Findings from DDI’s 2005-2006 Leadership Forecast indicate leaders themselves becoming more confident in leaders’ ability to guide their organization over the next five years. 53% of leaders expressed high confidence when asked this year versus 46% in 2003. However, HR professionals have lost confidence over the same time frame, moving from 43% of them being highly confident in 2003 to 39% in the 2005-2006 study just released.

Center for Creative Leadership (CCL) and Executive Development Associates (EDA) have both done studies recently referencing leadership bench strength as a major concern and priority for organizations that have realized they do not have skilled people in position to take over for their leaders who are retiring over the next few years. For growing organizations, it is even more of a concern as they struggle to fill new positions in an ever-expanding marketplace. In the EDA study, 70% of respondents said it was the biggest issue having the biggest impact on their executive development over the next two to three years.

Is the lack of leadership bench strength a quality issue or a quantity issue? It is likely both. According to Jim Bolt, Chairman of EDA, “More and more companies are saying that leadership is no longer an exciting career path for people. There is so much stress associated with being a leader that they are having a backlash of people who don’t want to be in leadership positions.” By the same token, many managers are missing some of the fundamental skills and traits needed to successfully lead an organization.

CURRENT STATE OF LEADERSHIP DEVELOPMENT

How are leaders being developed in corporate America? This section will provide some information on trends.

In a study by EDA called Executive Trends 2004: filling the talent gap, they asked respondents to identify what learning methods will be emphasized in the next two to three years. 75% of the respondents identified the use of senior executives as faculty as their number one learning method (as opposed to just kicking off or closing the training program). This is the first time in the 21-year history of this survey that this approach to learning topped the list. We see tremendous benefit from having senior leaders train current and aspiring leaders. Not only does it greatly facilitate cultural alignment, it also ensures relevance and integration of the learning material into the fabric of the organization.

Followed closely behind at 73% was action learning, defined as “working in teams on current business problems or opportunities”. Here again, when we look at relevance, integration and the compelling nature of learning as critical to success, action learning offers a healthy dose of all three. Executives as faculty and action learning were
followed by: Use of outside speakers, outside experts as faculty and use of external executive coaches (67%, 63%, 56% respectively). 36% of companies surveyed expected to use web-based or online learning for use in executive development. 23

DDI’s 2005-2006 Leadership Forecast reported on the learning methods used most often for leader development. 85% of respondents indicated they make moderate or extensive use of formal workshops or training seminars, 77% use special projects or assignments within one’s own job responsibilities, 65% use reference materials (articles, books, etc.), 48% use coaching with internal coaches or mentors. Special projects or assignments outside of one’s job responsibilities are used moderately or extensively by 46% of survey respondents and 38% indicate use of computer-based learning for leader development. 28% indicated coaching with external coaches or mentors and 26% use expatriate assignments. Also, the majority of HR professionals surveyed (68%) indicated that online learning has improved the quality of their leadership development offerings. 24

What is interesting is the contrast with the above usage rates versus the activities rated as “highly effective” by the leaders surveyed in this study. The top six development activities selected with the percent of leaders who rated them very effective were:

1. Special projects within one’s own job responsibilities 69%
2. Special projects outside one’s own job responsibilities 55%
3. Expatriate assignments 54%
4. Formal leadership training 51%
5. Coaching with internal coaches 45%
6. Coaching with external coaches 42%

When the study looked at the coaching experience from those leaders who had actually worked with a coach or mentor, 91% found the experience to provide moderate or great benefit for their careers. 25

Although e-Learning does not appear to be used moderately or extensively by many companies yet, there are some promising indications that e-Learning when combined with other learning modalities, can be a very powerful blend. A study on Blended Learning for Leadership Development conducted by Bersin & Associates looked at the use of e-Learning by nine organizations who combined e-Learning with classroom training, e-Learning with coaching, or synchronous e-Learning with asynchronous e-Learning to achieve positive results. 26 These organizations were satisfied with their use of e-Learning for leadership development. It is our prediction that we will see many more organizations adopting e-Learning as a component in their leadership development efforts. What is critical is to identify where in the blend the e-Learning components best fit. Whether it is for pre-work, introduction to information, in support of action learning projects, or for post-program refreshers, we have barely skimmed the surface on the potential that it holds. Section II looks at the use of online systems for performance support and follow-through management.

Questions: Would your organization benefit from having senior executives as faculty? What would it take to make that happen? How much emphasis do you put on blended learning experiences over time? Have you incorporated some e-Learning components successfully? Where else might e-Learning be used in support of leadership development?
What are the differences in leadership development methods used for top executives, compared to vice-presidents, high potentials, and others?

In EDA’s 2004 study, the most common development activity for senior executives and VP-level leaders was executive coaching. For high-potential leaders the method used most frequently was developmental job assignments. The second most frequently used method for all three of these groups was customized training programs. From our own experience and informal research, it seems classroom training is the primary method used by organizations to develop front-line and mid-level managers. Some companies are also using mentoring programs, action learning and e-Learning as well.

LEADERSHIP TRAINING AS ONE ASPECT OF LEADERSHIP DEVELOPMENT

We all know that leaders are developed through a wide range of experiences and that the best development happens in the midst of work and life itself. Wise companies strategically use promotions, assignments, job rotations, coaches, mentors and action learning projects to help leaders maximize the learning from their on-the-job experiences. Many of these developmental activities fall under the umbrella of “job-embedded learning.”

So, where does formal leadership training fit? It is our position that merely providing formal training programs for leaders is not going to be sufficient to build excellence in the leadership ranks. That said, formal leadership training is an important catalyst for leadership development when it meets some important criteria. These criteria are discussed on page 12 in the section called Three Themes That Work.

Another key variable in the success of leadership training is follow-through. Without immediate and ongoing follow-through, the new skills, behaviors and perspectives that were introduced fade away. As many training professionals will tell you, the real learning takes place when the program ends. Does your organization realize the benefit of the investment you make in your leadership training? This guide provides some recommendations to help you ensure the highest return on your investment and Section II focuses specifically on follow-through and some software tools available to assist you in your efforts.

Electronic performance support systems (EPSS) have become a very valuable way in which to provide ongoing reinforcement of learning by providing “just in time” information. This report will look briefly at three such EPSS and the value that they can provide.

Training is an important component of leadership development. Where training falls short in effectiveness is when it is viewed in isolation of performance. Training is not for training’s sake. As training is planned and executed, we encourage you to see it in the context of the larger picture of leader and business performance. Until we actively emphasize performance, training will continue to under-deliver on results. Training either facilitates enhanced performance, or it is a waste of time and money.

Question: Are your training and development professionals focused on the big picture of performance? Does their performance evaluation include reference to how and if the training is applied and the results generated? What changes need to take place within
Section I - Introduction

Why Conduct Leadership Training?
Given the power of learning in the midst of work itself, why should companies invest the time, money and resources to conduct formal leadership training? There are several benefits provided by formal training. Here is a look at a few.

Formal leadership training provides:
1. **Scale** - Many people can participate in the same learning experience in a relatively short time frame.
2. **Consistency and Momentum for Change** - Leaders and potential leaders get exposed to the same process, skills and behaviors delivered in a uniform way. This helps to build consistency in the approach used by the organization and helps create momentum toward creating a common leadership culture with language that leaders at multiple levels understand. Change requires multiple people moving in the same direction. Formal training can help move an organization in a new direction.
3. **Cost-Effectiveness** - From a time and resources perspective, formal training generally has a lower cost per learner than individualized development activities like one-on-one coaching.
4. **Community** - Much of the learning that takes place during a training experience comes from the interaction of the learners. There is opportunity to practice the skills in a “safe” environment with other learners, there are the insights gained from others who may hold different perspectives, demonstrate different strengths and come from different organizational levels and/or functional areas.

Beyond the formal training experience, there are the benefits of the informal learning network that can be nurtured. Wise organizations look for ways to cultivate these informal networks that begin in the formal training. They may create “communities of practice” in which members can continue to meet and share their experiences. Action Learning projects can be great ways to move the community that has been formed into the future (live or online). We’ve all seen the statistics that say that 80% of learning in organizations happens informally. For leadership learning, we would suggest that number is probably closer to 90%. Formal training can serve as a very powerful catalyst to drive new informal learning networks over time.

**Question:** Are you taking advantage of formal training experiences to serve as springboards for informal learning networks?

THE PLANNING PROCESS FOR LEADERSHIP TRAINING
Three Themes That Work
How do you know what types of leadership training in which to invest for your leaders and aspiring leaders?

Before we move into the specific steps, it is important to set the stage for what works. We encourage you throughout all steps of the planning, execution and follow-through, to check in and see ask if the element you’re considering meets the following criteria:
1. Is it relevant?
2. Is it integrated?
3. Is it compelling?
1.) Relevance

Leadership training needs to be relevant to the future-focused business strategy. Where is your business going and what will this require of your current and future leaders? Leadership development planning needs to be tied to the strategic planning of the organization. Too often, leadership development planning is done in isolation, or is based on where the business has been, not where it is headed. For a fresh look at the types of qualities that will continue to rise in importance, you might enjoy reading Daniel H. Pink’s new book called "A Whole New Mind: Moving from the Information Age to the Conceptual Age.” In it, he talks about the increasing need for individuals and organizations to develop their abilities in the areas of design, story telling, empathy, pattern identification (symphony), play and meaning making.

Leadership training needs to be relevant to the individuals involved. It is our strong recommendation that participants be actively involved in their own development plans and included in the decisions on their training opportunities. This will be discussed further in the section called Needs Assessment.

The training needs to provide benefits to participants both personally and professionally and needs to be directly and immediately applicable to the work they are doing. They need to be clear as to the strategic objectives of the training and what is expected of them as a result of the training – what and how change will be measured. All of this information needs to be communicated upfront to the participants so that they are completely clear as to why and how this training is expected to make a difference, the importance of its application back on the job and some agreed upon measures of success. It also needs to be communicated to those with whom they work closely, their manager and team members. Without the context set, the training impact is likely to be negligible.

2.) The Need for Integration

Leadership training needs to be integrated into the fabric of the organization. It needs to be incorporated into your culture and into the performance management systems and practices of your company if there is any hope for lasting change. How many times have you brought some new perspective or ideas or behavior back from a workshop, and had it fall flat when you introduced it back on the job? What are you going to do to help support the transfer of learning back on the job? How will you prepare participants’ managers to support and assist them in this process? What do their peers need to know about the experience they’ve had and how they can impact the person’s ability to incorporate new ideas, new practices on the job? Effective integration of new learning back on the job requires active communication before, during and after the training with all affected constituents.

There is also a need for integration of leadership development efforts with your strategies for succession planning and leader selection. Consistency of approach will ensure that your efforts in all three of these areas will be successful. It is much easier to develop leaders who start out with the competencies you have identified as strategic, where leadership development efforts can focus mainly on leveraging strengths.
3.) Compelling Nature

**Leadership training needs to be compelling.** The strategic need for the training, the training program itself, the emphasis on skills transfer to the workplace and the measurement of results all need to be compelling. The training itself is much more likely to lead to behavior change if it is interesting, engaging, and enlightening. This has become clearly evident in the pendulum swing we have witnessed around e-Learning. A few years ago, training professionals were concerned that they were about to become obsolete. Many companies who experimented with e-Learning have taken a conservative approach to expanding its use within their organizations and much of that is due to the lack of interesting, engaging content available. The good news is that e-Learning is maturing and many e-Learning solutions are capturing learners’ attention and delivering solid performance results.

In addition to incorporating the three themes just discussed, leadership training needs to be thoughtfully planned and executed. We will look next at our eight recommended steps for effectively planning and delivering your leadership training, starting with Needs Assessment.

**EIGHT STEPS IN THE PLANNING PROCESS**

**Step One: Needs Assessment**

Leadership training is likely just one component of your leadership development strategy. In order to begin the planning process, you will need to understand the overall development needs for leaders within your organization and then assess which ones are best addressed through formal training.

Here is a list of several places to investigate on the way to understanding the strategic needs at various management levels:

**Needs Assessment Data Checklist**

- Future-focused business strategy
- Simple leadership competency model
- Multi-rater assessments on individual leaders
- Recent performance reviews
- Self-evaluations and objectives for development
- Leadership team profile of collective strengths and gaps
- Succession plans/career development plans

**Future - Focused Business Strategy:** For the leadership training to be relevant, it needs to be focused on the business on a “go forward” basis. What is different about where or how we are going to do business in the future and what does that require of our leaders at each management level and in the various functions involved?

**Simple Leadership Competency Model:** There are several good models out there. The key is to identify or create the one that fits your business culture and stage in the business lifecycle. Look at your top performing leaders at each level and identify what competencies they have that separate them from your average and low-performing leaders. Within those competencies, identify which ones have the greatest impact and make those your top priorities. Keep the list short.
Multi-rater Assessments: What have peers, direct reports, customers (internal and/or external) and managers identified as this individual’s strengths and need areas? How does this map to the leadership competency model and to this individual’s role in executing the future-focused business strategy?

Recent Performance Reviews: Reviews can provide meaningful information on how well an individual performed relative to the business goals and objectives they set at the start of the period. They are also helpful for identifying what issues got in the way of successful completion. Sometimes these issues relate back to a training need. For instance, an overdue budget may indicate a need for improved time management or project management skills. It may, on the other hand, stem from a need for greater financial acumen. Yet another possibility may be an unmanageable workload. Further information would be required to correctly identify the training need, if there is one, in this case. Looking at it from a performance perspective enables you to identify obstacles and determine whether or not they are training related.

Self-evaluations and Objectives for Development: Do you ask your leaders what it is they believe would be most helpful to their own success? What objectives do they have for development and are they interested in training to enhance their effectiveness? Learner buy-in is critical to realizing a return on the training investment. Make learners co-creators of their development plans and see what types of training/development they are motivated to participate in.

Leadership Team Profile of Collective Strengths and Gaps: Depending upon the structure of your organization and the degree to which your success requires effective collaboration, you may find profiling your leadership teams to be an effective way to help identify skill gaps. “Like attracts like”, and therefore, you may end up having leadership teams in which the members have very similar strengths and need areas. These gaps can have a huge impact on the team’s ability to anticipate problems, create contingency plans, and conduct effective strategic planning. Helping leadership teams understand their collective profile can greatly increase their willingness to support training for the gap areas and to move from good to great in other areas.

Succession Plans/Career Development Plans: If your organization does a good job of identifying pools of candidates for higher-level positions, this information is very important to your leadership training/development planning process. For instance, you may have some mid-level managers who have been identified as candidates in the talent pool for Vice President. Assessing their current competencies versus those required for the VP level may demonstrate a need for improved skills in strategic planning. It may be wise to make this developmental area a top priority that will serve them now and in the future.

Review of the elements just discussed provides an overall understanding of the development needs of your leaders. Remember that development need not just be focused on addressing skill gaps. There is substantial evidence that moving a key leadership competency from average or good to great can have tremendous impact on the bottom line, as was discussed earlier. From here, you will begin to prepare development plans for each individual, or group of leaders. Many competency areas will lend themselves to on-the-job development activities, within the work itself. Some may best be addressed through personal coaching. Others will be served well through formal
leadership training. Assuming that leadership training was identified as one of the elements of your leadership development plan, we will look next at step two in the planning process.

**Step Two: Leadership Training Strategy/Preparation**

Given that leadership training can be very costly in terms of time and resources, it is critical to maximize its returns. Once the needs are clearly assessed and training is identified as the appropriate intervention, it is critical to plan not just the training program, but training in the context of improved workplace performance.

Here is a checklist of things to consider in the planning stage:

- Assess constraints/opportunities
- Assess priorities and pre-determine measurements of success
- Evaluate vendor offerings and in-house offerings
- Plan for reinforcement, follow-through (transfer to on-the-job performance)
- Development of curricula
- Communication of leadership training curricula

**Assess constraints and opportunities:** It is always helpful to begin with a realistic assessment of constraints and opportunities. Different management audiences will have somewhat different training needs. Your current realities of budgets, geographic distribution of learners, workloads, of languages involved, etc. are important to consider as you begin your planning process. It is also helpful to look at what has worked in the past for elements that can be brought forward into your current plans.

**Assess priorities and determine measurements of success:** Based on the data you gathered during the needs assessment, what types of training are going to have the greatest impact on your organization’s future success?

It is also important at this stage to identify how you will know if the training has been successful in terms of its impact on performance. What are some quantifiable measures and how will you ensure they are tracked effectively with a minimum of effort?

The measurement of training is no easy matter. However, it is sometimes made more complicated than need be. Multi-rater feedback collected before training and then several months afterward can assist with determination of the behavior change that has taken place.

Also, given that leader effectiveness has a considerable impact on the productivity of direct reports, appropriate measures can be taken pre and post training on departmental performance. Such measures may include: customer satisfaction scores, employee satisfaction scores, sales revenue, on-time delivery rates or error rates.

Another way to look at the impact the training can have on performance involves the use of control groups and a comparison of performance three to twelve months post-training versus no training at all.
In EDA’s Executive Development Trends 2004, “less than 20% of the companies surveyed say they excel at measurement, with measurement defined as…

*We set clear, measurable objectives when we create new executive development strategies, systems, processes, and programs. Then we measure the business impact using metrics that matter to senior management, and communicate the results effectively.*

However, 52% of respondents indicated that use of systematic measurement of their [leadership development] efforts was a strategy/activity to be emphasized in the next 2-3 years. Organizations understand that it is strategically important to measure leadership training’s impact on performance. However, they struggle with the execution. We encourage you to determine your measurements early in your planning process. Limit it to a few means and be realistic in terms of the time, energy and resources you can devote to collecting the information. Obtain agreement upfront from the direct managers of training participants that measurements will be taken, will involve them directly and that they have a critical role in ensuring that training is transferred to the workplace.

**Step Three: Evaluate Vendor and In-House Offerings**

Should you develop the training yourselves? Is it better to license programs from a vendor, certify your trainers and conduct the training using your own facilitators? Does it make more sense to use an outside vendor and have them deliver the training? Does this training need require a highly customized solution? Now is the time to look at all of the possible solutions so that you can begin to evaluate what is the best choice for the given audience and training/business need. If you have a close relationship with a leadership-training vendor, this is where you can take advantage of their understanding of your business situation to see what they recommend in terms of solutions. It may be that a hybrid solution where you co-facilitate with your vendor, or a licensing arrangement, will be best suited to your needs. Much of this depends on the scope of the training need, how many participants are involved and whether or not this solution will become part of an ongoing leadership curriculum, or a single event.

We encourage you to look for ways in which your senior executives can participate in the training effort. EDA identified in their Leadership Forecast 2004 that many companies see senior executive involvement as a best practice strategy for the future. Many companies are experiencing great success having their senior leaders serve as faculty for their leadership training programs. The benefits are many; not only does this activity clearly communicate the strategic importance of the training, it helps with organizational alignment and keeps senior leaders in touch with the realities of the business.

*Application Question: How can you involve your current leaders as facilitators in your leadership training?*

**The Power of Blending**

We strongly encourage you to find ways to incorporate multiple modalities in your learning curricula. Pre-work activities may involve reading a book on the topic, or doing some asynchronous e-Learning. The classroom training may take place over 4 weeks, with an action-learning project in between. Reinforcement may involve job aids and weekly email reminders. Follow-through options could include coaching, on-line follow-
through tools and/or journaling. The use of multiple modalities over time is a powerful way to ensure return on your training investment. The principle here is, “Do it well, or don’t do it at all”. Organizations are better served to conduct less leadership training if they execute well, than a lot of independent training programs, which are treated as separate from the work. Several vendors offer options for blended learning. Be sure to ask what is available. If the vendor offerings you are considering do not include “blending”, consider how you might add other modalities before and after the vendor’s program to ensure multiple touch points over time.

**Step Four: Development of Curricula**

Now is the time to assimilate the information you have gathered in the previous steps and use it to build your various leadership training curricula. Depending upon your resources and the leaders involved, you may have distinct curricula for each management level. In addition, we encourage you to have some individual variability based on individual’s objectives and competency gaps. Perhaps you can build in choices for learners in which they can select from a few options for building a particular competency. This is moving toward a “self-serve” model of learning that is advocated by such learning gurus as Elliott Masie.32

The critical piece here is to design into the curricula the need for communication events before, during and after the training, as well as follow-through and practice opportunities. If there is an opportunity to space the training out over a period of time, we encourage you to do so. It can support the learning by giving the opportunity for learners to reflect upon the information learned and practice the new skills/behaviors in between sessions. Using a blended approach, with a mix of modalities can assist in addressing different learner styles and make it possible to provide multiple touch points over time. For instance, you may decide to introduce concepts through asynchronous e-Learning or virtual classroom and then gather participants together in a classroom for skills practice, feedback and coaching. Coaching as follow-on to training is another highly effective combination.

In our discussion of “Three Themes That Work”, we talked of the importance of training that is compelling. What makes for compelling training? It needs to be engaging. If it captures the interest and attention of the learners, you’ve accomplished the first test. This is where some e-learning solutions suffer. “On-line page-turners”, as they are sometimes referred to, can leave a lot to be desired in terms of capturing learners’ mindshare. Synchronous e-Learning like live web casts are often low on interactivity and high on moderator slide-reading.

Applicability is also a critical component for effective learning. It may be fascinating to learners but have little relationship to their work, in which case, it serves as nothing more than a break from the regular workday. This is that critical test of relevancy, which was also discussed in the “Three Themes That Work” section.

Piloting a new curriculum is an important component of testing its effectiveness. This provides opportunity for collaboration with learners, identification of challenge areas and modifications to the program before it is rolled out to the masses. We strongly recommend you identify a good cross-section of learners to participate in pilots and create several discussion periods before, during and after the training to capture learners’ comments and questions.
**Step Five: Plan for Follow-Through and Integration**

In this part of the planning process, we encourage you to proactively consider how the solutions you have selected are going to be supported by the culture to allow for the new learning to be integrated. What preparation needs to happen with the learners and with their work groups to set the stage for application of the learning back on the job? What information do the managers of the learners need in order to plan for practice, feedback and ultimately, measurement of how the learning is applied back on the job? Also, how will you build in various touch points over time?

Here is where follow-through management tools like the ones offered by Fort Hill Company and Zenger Folkman can be enormously helpful. Their online tools enable inexpensive and systematic follow-through on goals and objectives set in a training program and provide reports to managers and those responsible for leadership development to evaluate the training’s effectiveness. See Section II for a brief look at these two solutions.

Also, electronic performance support systems (EPSS) can be enormously powerful ways to integrate learning into the daily workplace by providing quick, “just in time” information on specific skills and behaviors. This information builds on what was learned in the formal training and is available when it is most needed. In section II we also provide information on three of these EPSS provided by vendors profiled in this guide.

If you have a performance management system, you need to plan how to integrate your formal training efforts into the system. Learning objectives need to be added to an individual’s performance plan and progress tracked. In addition, the performance review process can include emphasis on both achievement of learning objectives as well as performance objectives. This is a powerful way to integrate learning into the culture of the organization.

Given that such a high percentage of learning is informal learning, some organizations are using formal training as a launching pad for networks and communities of practice in which participants can continue their sharing of ideas over time. Ongoing collaboration amongst participants and with their managers, coaches and subordinates helps cement the learning and transfer it to the workplace where the returns can be realized.

**Step Six: Communication of Leadership Training Curricula**

Effective communication before, during and after leadership training is essential to its success. What is effective communication? It is communication of the context for the training, the content of the training and the post-training expectations.

With whom are you communicating? It is essential that the learners themselves are clear as to why the training is going to take place and how it fits into their career development, as well as the future success of the business. They need to know the what, when and how of the training so that they can schedule accordingly. If there is pre-work and/or post-work involved, this information should be communicated as well. They also need to know what the organization expects of them at the conclusion of the training in terms of follow-through, on-the-job application and measurement of success. They also need to know the role of their managers in the follow-through process.
Managers need the same information provided to them with emphasis placed on how they are expected to assist with any pre-work, post-work and follow-through efforts.

Also, it can be very useful to communicate with the work-team if not all are participating in the training. Not only does this enable team members to plan their schedules with their teammates’ absences, it also demonstrates a commitment to integration and sets the expectation that new learning will be brought back to the workplace at the conclusion of the training.

**Step Seven: Implementing Your Leadership Training**

If the proper planning has been done up until now, your leadership training is likely to be well received. We encourage you to actively solicit the input of participants as they go through the programs and several months after. This information will enable you to continually improve the leadership training. Also, it is critical to stay on top of the changing needs of the business so that the training is future-focused and providing what is needed on a go-forward basis. Having your senior level executives involved in the delivery of training is one highly effective way to ensure that what you are providing to participants is strategically aligned with where your business is going.

**Step Eight: Measurement and Evaluation of Learner Results**

(Requires pre- and post- measures)

We talked in step two of the need to pre-determine your measures for success and then obtain your baseline from pre-training measurements. Depending on the nature of the training, multi-rater assessments may be used to reflect the change in participants’ behavior as a result of the learning. Other types of training may lend themselves better to self-assessments or other performance measures identified by managers. These measurement discussions, according to the process we’ve recommended, happen before the training takes place and are part of the communication process to learners and their managers. There is a strong case to be argued for using business metrics such as department turnover rates, customer satisfaction scores, employee opinion survey scores, and revenue and profit numbers. Other sorts of measures that may be more appropriate for some groups include on-time delivery statistics or error rates.

In addition to measuring learner results, we’ve discussed the importance of evaluating the leadership training experience in order to continuously improve. Managers of participants are another critical source of information as to what changes need to happen for the training to have maximum impact on leader and business performance.

If you follow this eight-step process, you will have a leadership training strategy that is well conceived and well received. Leaders will benefit from building their skills and competencies, they will understand what is expected in terms of improved performance and you will be supporting them with the resources they need to realize return on your leadership training investment. Let’s look now at the leadership-training marketplace of vendors and offerings.
THE LEADERSHIP TRAINING MARKETPLACE
Assuming your organization supports investment in formal leadership training, it is helpful to be aware of what’s available through vendors. The marketplace for leadership training is large and complicated. There are hundreds, if not thousands of organizations in the United States that proclaim to offer solutions for developing leaders. Many of these are individual consultancies or coaching practices. We have yet to discover a single source for gathering information on vendor offerings, and have created this guide as one resource to assist you.

There are a wide variety of organizations that provide leadership training. They can be categorized as follows:

- Executive Education Departments of University Business Schools
- Leadership Consulting/Training Organizations that specialize in custom designed development solutions
- Training/Consulting Companies that offer off-the-shelf programs and a varying degree of customization
- Talent Management Vendors whose offerings cover much of the employee lifecycle (selection, assessment, retention, development) and have offerings specifically for leadership development

Here is a table listing these vendor categories with the corresponding vendors that participated in this year’s resources guide.

Executive Education Departments of University Business Schools:
- Berkeley Center for Executive Development
- Darden School Executive Education, University of Virginia
- Harvard Business School Publishing (HBSP)
- Kenan-Flagler School of Business, University North Carolina
- Stanford Graduate School of Business Executive Education
- Thunderbird, The Garvin School of International Management Executive Education
- Tuck Executive Education at Dartmouth
- UCLA Anderson School Office of Executive Education Programs
- University of Chicago Graduate School of Business Executive Education

Leadership Consulting/Training Organizations who provide custom-designed programs exclusively:
- Duke Corporate Education
- Executive Development Associates (EDA)
- Mercer Delta Executive Learning Center (formerly CDR International)
- Senn-Delaney Leadership

Training Companies with off-the-shelf solutions for leadership development and varying degrees of customization:
- AchieveGlobal
- American Management Association (AMA)
- Balance Learning
- Center for Creative Leadership (CCL)
- Development Dimensions, Inc. (DDI)
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- Franklin Covey Cos.
- Gallup
- Gordon Training International (GTI)
- Interaction Associates
- The Ken Blanchard Companies
- Learning Technologies, Inc. (LTI)
- Lee Hecht Harrison (LHH)
- Ninth House
- Results-Based Leadership (RBL)
- Zenger Folkman

**Talent Management Vendor:** Development Dimensions, Inc. (DDI)

**SEGMENTATION – SCALE AND DEGREE OF CUSTOMIZATION**

There are several dimensions with which we can segment the vendor marketplace. One way to look at the vendors is based on their ability to scale their solutions. In this instance, we are defining 'high scalability' as the vendor’s ability to deploy their training solution to large numbers of participants within a short period of time. High scalability may involve having a large number of trainers/consultants available to provide the training. It may also involve having e-Learning solutions that can easily be deployed to many people simultaneously. A high degree of scalability also refers to the vendor’s ability to deliver their training solutions in a variety of languages and in a variety of countries. It’s a good idea upfront to determine with the vendor whether they have the capability to meet your needs for scale within your desired time window for executing the training.

Another dimension to consider is the degree to which you’ll be seeking customization of your training solution. A few of the vendors described in this guide specialize in custom designed solutions. Others have several off-the-shelf solutions that can be tailored to the needs of the client, but are limited in their expertise and/or resources for designing a solution from scratch.

The chart provided on the next page is a simplified representation of the vendors profiled in this guide based on these two dimensions. The vendors are listed in clouds to demonstrate that these are not hard and fast positions. A vendor that typically provides off-the-shelf solutions can likely meet the need for a custom-designed solution as well, it may simply be something they do not do often or cost-effectively. A small vendor may be able to address scale issues by working with an alliance partner to deliver the solutions. These are examples of how segmentation can be difficult. This chart is meant to simply give you an approximate guide. You’ll note that the Executive Education market from the business schools have been grouped in the large cloud near the bottom. For information on scale and degree of customization, please refer to the individual vendor profile listed in Section III.
SEGMENTATION – TARGET MANAGEMENT LEVEL
Another way to look at the vendor marketplace is to consider which management audiences the vendor and solution are primarily aimed at addressing. Some solutions are focused on addressing the needs and challenges of mid-level management (Directors and above). Others focus on the needs of first line managers. Some programs are geared toward VP level and beyond. You’ll notice in Section IV, the tables list individual training programs by competency and also by primary and secondary audiences. This information should help you determine which of the vendor solutions are aimed at the level(s) of leaders for whom you will be offering the training.

MANAGING VENDOR RELATIONSHIPS
Managing relationships with multiple vendors can be very time-consuming. We recommend, if possible, working with a few leadership-training vendors who can meet most of your organization’s strategic training needs. That way, you can build deep relationships and partner with them to address your changing needs over time.

That said - there might be certain training program needs that are outside the scope of your current vendors. In this case, as you talk to new vendors about new solutions, it will be important to clearly communicate your business need for the training and how it fits into your overall leadership development strategy. Ask them for suggestions to
assist with skills transfer back on the job and pre-training and post-training measurement options. Also, look at ways in which they can help you build a blended solution that provides multiple touch points over time, using a variety of learning modalities. It is essential that the diverse training solutions you deliver be integrated into a comprehensive leadership development strategy that is well planned, well communicated and well executed. The pieces of the development puzzle need to fit together in a way that makes sense to your business and to the individuals involved.

**Evaluating Vendors/Solutions**

When considering a new vendor and their training solution, we encourage you to go beyond the basics of the training program and its costs to consider the following:

- Reputation and client references
- Alignment with your leadership philosophy and model
- Commitment to results
- Service strategy/relationship
- Ongoing support/accessibility
- Extent of customization available (if needed)
- Depth and breadth of offerings/solutions
- Assistance with measurement/ROI

The better the “fit” with the vendor in question, the more likely you will work well together to ensure the training solution is relevant to your business, compelling, and transferred into enhanced performance back on the job.

**Structure and Definitions Used in This Resource Guide**

This section provides you with some background information on how this guide is assembled and some of the underlying assumptions we used in its creation.

Given that, to our knowledge, this is the first guide of its kind, we wrestled with the best way in which to communicate the information. We went to some of our senior level HR.com members who are charged with leadership development for their organizations and asked them how they would like to see the vendor and training program information provided.

They requested that we provide a section in which vendors and their programs were explained in fair detail and a separate section (Section III) with tables for easy reference to all programs contained within the guide (Section IV). They asked that we arrange the programs in the tables based on the primary leadership competency they address. Then, they asked that within each listing, we indicate the target management level(s) for whom the program was designed. We did this by including a primary audience column and a secondary audience column. In some cases, several management audiences were identified.
Leadership Competencies
We used 16 leadership competencies for our analysis. The leadership competencies we used to categorize the 187 training programs profiled in Sections III and IV are:

1. Appreciating Diversity
2. Assessing/Developing your Personal Leadership Skills and Style
3. Building Partnerships and Alliances
4. Building Positive Relationships
5. Business Acumen
6. Coaching Skills
7. Communication Skills: a.) Conflict Resolution; b.) Negotiation Skills
8. Creativity and Innovation
9. Dealing with Ambiguity
10. High Performing Teams
11. Leading/Sponsoring Change
12. Motivating and Inspiring/Engaging Others
13. Performance Management
14. Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning
15. Setting and Achieving Goals
16. Talent Management (recruiting/retaining/developing others)
17. Thinking Globally
18. Time/Project Management

How did we come up with this particular list of competencies? We reviewed a number of respected sources on the topic including Zenger Folkman’s list, based on their book *The Extraordinary Leader*, DDI’s leadership competencies, those from the Center for Creative Leadership, and an overall look at the leadership training programs currently being offered in the U.S. today. We also provided an “Other” category for vendors to use when they couldn’t find what they needed in our list.

Several training programs address most of the competencies listed, however, vendors were required to identify within the list, the primary one. The additional (secondary) competencies are listed in the final column of the tables.

**PRIMARY AUDIENCE AND SECONDARY AUDIENCE**
We asked vendors to select which management levels (based on past participation in the program) each offering was aimed at. The management levels were described as follows:

1. Senior VPs/C-level executives
2. Directors and VPs
3. High Potential Leaders (managers who have potential for future executive-level positions)
4. Mid-level Managers (managers of managers)
5. Front-line Managers (and supervisors)

The vendors were asked to identify their primary management audience(s) for each offering and their secondary audience(s).
TRAINING MODALITIES
For each training solution, we asked that vendors categorize it as one of the following:
- Live, In-Person Classroom Training
- E-Learning
- Blended Learning Curriculum
- Training Product

Here are the definitions we used for each of these modalities:
- Live, In-Person Classroom Training - traditional instructor-led training that takes place in a classroom. We include reference to both open-enrollment programs and client-sponsored (may or may not be custom) programs. Client-sponsored programs include only participants selected by the client, versus open-enrollment programs in which individuals from a variety of organizations can enroll in a program promoted through an advertised schedule.
- E-Learning (synchronous and asynchronous)- e-Learning refers to instruction delivered over the Internet or a corporate intranet to browser-equipped learners. This includes both synchronous (in real-time – such as distance learning, webinars etc.) and asynchronous (self-directed, self-paced). If the learning is delivered via CD-ROM, it is also considered e-Learning, based on the definitions used in this guide.
- Blended Learning Curriculum refers to all offerings that combine two or more of the modalities. Examples include: e-Learning with classroom training, classroom training with coaching. Also, if the learning program involves a combination of self-paced online courses (asynchronous e-Learning) with live on-line collaborative sessions (synchronous e-Learning) that is also considered blended learning. Some vendors provide blended learning alternatives that can be packaged with their training programs, however, if they do not consistently sell them as a package, we did not consider them blended.
- Training Products - This category includes workbooks, books, videos, audiotapes and job aids that clients purchase as stand-alone solutions for their leadership training efforts. If the materials are used in conjunction with a classroom or e-learning course, they do not show up in this category. If they are support materials for a training program, they will be listed in the program profile as support materials. Please note: CD-ROMs as stand-alone training products are categorized as e-Learning.

SUMMARY OF THE REMAINING MATERIAL
This concludes Section I of this guide. We hope it has been helpful in giving some direction to those who are seeking it in their leadership training efforts. What remains are the following three sections with their elements listed as follows:

Section II – Transfer and Maintenance of New Skills and Behaviors
This section looks at performance support systems. It profiles systems from three of the vendors included in this guide:
1. DDI – Online Performance and Learning (OPAL)
3. Ninth House – Instant Advice
This section also profiles two skills transfer management systems or follow-through management systems, as they are sometimes called:

1. Friday5s® by Fort Hill Company
2. ActionPlan Mapper® by Zenger Folkman

Section III – Vendor and Program Profiles
All 28 vendors and 187 programs are included with brief descriptions of each. The vendors are listed alphabetically. Some vendors had extensive information that was consistent across all of their programs; therefore we included this in a section called Standard Information. Following that are the program summaries for each particular vendor, listed in alphabetical order. To find a particular program summary from the tables in Section IV, look in the far right column where it says ‘page’ and it gives the cross-reference to the page in Section III.

Section IV – 16 Competency Tables
Each table lists all programs that vendors identified as having that competency as its primary emphasis. Secondary competencies are also listed, so be sure to look at those. Also note that the programs are listed in a particular order, with the ones focused on senior executives at the beginning, and then listed in descending order of management level. Some programs indicated “all management levels”.

There is no “one size fits all” approach to leadership training that will work. We hope that this information will help you as you determine the best approaches to use in building the skills and abilities of your current and future leaders.
TRANSFER AND MAINTENANCE OF NEW SKILLS AND BEHAVIORS

In order for formal training solutions to have an impact on leadership performance, the new insights, skills and behaviors need to be transferred to the work environment. This transfer is greatly facilitated by:

- Performance Support
- Follow-through

This next section will profile some solutions in each of these two categories.

Performance Support
There are many ways in which reinforcement and support for the learning transfer can take place. The most obvious and powerful approach is for managers to take an active role in setting expectations for on-the-job performance, supporting opportunities to use the new skills, providing feedback and discussing progress. Some organizations also use job aids, wall charts, email tips of the week and other touch points to help keep the learning alive once the formal training ends. We highly recommend a blended approach to performance support and planning for this critical component prior to the training.

There are performance support solutions available for every budget, from laminated wallet cards to colorful posters, all the way up to online support systems.

Online performance support is a category that is gaining traction in the learning space. Officially called Electronic Performance Support Systems (EPSS), these searchable online systems are focused on delivering just-in-time information to support a specific performance need that is usually situational.

These concise knowledge nuggets help reinforce principles and/or processes introduced in the formal training session and give them specificity in their application. The benefits of these systems are their ability to deliver just what is needed, when it is needed. This helps integrate the learning into the workday context.

We will profile three EPSS available through leadership training vendors included in this Resources Guide:

2. Instant Advice from Ninth House
3. Online Performance and Learning (OPAL) – from DDI

For more detailed information than what is provided here, and/or to see demonstrations of these performance support systems, please contact the vendors directly.

Harvard ManageMentor® Plus

**Modality:** Electronic performance support system

**Description:** Harvard ManageMentor® PLUS is an online performance support resource that delivers practical information and tactical tools to help managers – at all levels of the organizations – do their jobs more efficiently and effectively. Typical tasks and challenges in 37 key management areas are covered in an easy-to-use format designed for quick access and use by busy managers right on their desktops.

**Benefits:**
- Provide a broad, consistent knowledge base for managers
- Realize greater productivity and cost savings as managers and teams gain from practical advice and improve performance
- Link to corporate internal competencies, training programs and other resources
Harvard ManageMentor® (HMM) is a multiple-use product managers use on an as-needed basis. Each topic has a “What You Can Expect” section that describes what managers can get out of a particular topic, but as a just-in-time performance support tool, the precise learning objectives will differ based on the timing, skill level, etc. This system has been in existence since 1997. Harvard ManageMentor® PLUS version 3 shipped 12/21/2004.

**Formal third party recognition and/or awards:**
1. 2004 14th Annual Workforce Optimas Award: Vision Category – HBSP customer Monical’s Pizza Corporation (Using Harvard ManageMentor®)

**Customization:** Harvard ManageMentor® PLUS can be customized to include co-branding, linking topics to corporate competencies, or inserting links to a company’s policies and procedures or other training programs. Some companies have added additional content inside the HMM architecture. Clients can also change images and scenarios to better fit their particular industry.

Topics may be used as part of a blended offering, as a pre-course warm-up or a post-course refresher. HMM Cafés are also available to run a turnkey ‘lunch and learn’ session that applies the principles to each company.

**Pre-assessments available:** For customers who want to assess user comprehension of the 37 topics, comprehension tests are available for a minimal additional charge.

**Number of modules:** This product covers 37 key management areas.

1. Becoming a Manager
2. Managing Your Career
3. Solving Business Problems
4. Managing Crises
5. Laying off Employees
6. Preparing a Business Plan
7. Making Business Decisions
8. Budgeting
9. Finance Essentials
10. Project Management
11. Managing Your Time
12. Running a Meeting
13. Leading and Motivating
14. Leading a Team
15. Delegating
16. Coaching
17. Assessing Performance
18. Setting Goals
19. Keeping Teams on Target
20. Working with a Virtual Team
21. Managing Difficult Interactions
22. Dismissing an Employee
23. Persuading Others
24. Giving and Receiving Feedback
25. Making a Presentation
26. Writing for Business
27. Managing Workplace Stress
28. Implementing Strategy
29. Capitalizing on Change
30. Managing for Creativity and Innovation
31. Implementing Innovation
32. Retaining Valued Employees
33. Hiring
34. Focusing on your Customer
35. Marketing Essentials
36. Negotiating
37. Managing Upward

Time spent on each module depends on a manager’s need. The just-in-time nature of this product lends itself to as-needed usage – a few minutes at a time, a few times per week over the course of a year.
Section II – Transfer and Maintenance of New Skills and Behaviors

Every topic in Harvard ManageMentor® PLUS includes the following features:

- **Core Concepts** - Essential information in an easy-to-read format
- **Find** - Keyword search
- **Take a Tour** - Flash demo to introduce a new program’s key features
- **Steps** - Quick steps to follow to accomplish a key task
- **Tools and Tips** - Helpful checklists, worksheets and interactive tools to enhance productivity
- **Practice** - Scenario-based interactive exercise
- **Self-Tests** - Interactive self-tests designed to reinforce key tasks
- **“What Would You Do” Section** - Realistic situations that present common business challenges and potential solutions
- **To Learn More** - Recommended resources that include two online articles for each topic drawn from *Harvard Business Review*, *Harvard Management Update*, and other Harvard Business School publications

**In addition:** The Implementation Toolkit helps facilitate deployment of Harvard ManageMentor® PLUS, as well as internal promotion and marketing efforts, helping to drive usage and make a company-wide launch successful.

**Optional materials available and associated costs:**

- **Harvard ManageMentor® Business Guides:** Customizable, portable companions reinforce training initiatives.
- **Comprehension tests:** Each topic offers a 10-15 minute level two assessment.
- **HMM Cafés:** These turnkey “lunch and learn” 1 hour sessions are available to clients that wish to apply learning from HMM content to the specific challenges and practices of their own company. Each Café includes a suggested structure, discussion guide, overheads and other instruments to make it easier for a functional leader (not just a training specialist) to deliver the program.

**Standard way to measure program effectiveness and individual behavior change:**

Each topic offers a 10-15 minute Kirkpatrick Level Two assessment to test your comprehension.

**Languages in which this program is currently offered:** U.S. English, Spanish, French, German, Portuguese, Canadian French

**Help Desk Support:** 8:00 am – 6:00 pm EST, Monday through Friday; Available in English, Spanish, French, Portuguese. Additional languages available by request; In-House

**MINIMUM TECHNOLOGY REQUIREMENTS**

**Operating systems on which this program is compatible:** Windows 98, Windows 2000, Windows XP

**Required Plug-ins:** Flash: Macromedia Flash 4.0 or better (optional), Adobe Acrobat 4.05 or better

**Minimum Bandwidth:** While the product will function via dial up, we recommend a cable modem or equivalent to support the new media elements and minimize load time. Access and usage will be slow using a dial-up.

**Browsers on which this program is compatible:** IE Explorer 5x, 6x, Netscape 6x, 7x, 8x

**Compatible/Compliant:** SCORM compatible; AICC compatible

**Additional information:** HBSP product lines are deployed with all of the leading Learning Management Systems.
Instant Advice from Ninth House

**Modality:** Electronic performance support system

The competencies addressed through this online performance support system are:

- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

**Description:** The Ninth House® Instant Advice® product provides immediate, actionable solutions to 500 of the most frequently encountered business challenges. Engaging, just-in-time learning gives employees the tactical step-by-step assistance they need to quickly resolve the daily issues they face at work. Ninth House offers Web-based advice from a wide range of business thought leaders including Ken Blanchard, author of The One Minute Manager®, Peter Senge, author of The Fifth Discipline, and Jon Katzenbach, author of The Wisdom of Teams.

**This program is:** CD-ROM and asynchronous (self-paced)

**Formal third party recognition and/or awards:** This program received the 2003 HR Exec Best Products Award.

**Participant profile:** The audience includes mid-level managers, supervisors and/or front-line managers and high potential leaders.

**The most common industries represented by clients purchasing this offering are:**

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Pharmaceutical

**Customization:** Complete custom design (as well as limited customization) is available

**Pre-assessments for participants:** Not available

**Pre-requisites:** No

**Number of modules:** 450+

**Length of each module:** 2-5 minutes
Section II – Transfer and Maintenance of New Skills and Behaviors

The percentage of each instructional technique for this program is as follows:

- Audio  70% (audio & video)
- Video  70% (audio & video)
- Simulations 20%
- Scenarios 5%
- Quizzes 5%

Pre-work/Post-work: Neither pre-work nor post-work is provided.

Standard materials provided with program: NetCD

Languages in which this program is currently offered: US English

Help Desk Support: 7:00 am – 7:00 pm; Available in English; In-house

MINIMUM TECHNOLOGY REQUIREMENTS

Operating systems on which this program is compatible: Microsoft Windows 98 SE, NT Workstation v4.0 with SP6 or later, Millennium, 2000 Professional, or XP

Required Plug-ins: Microsoft Windows Media Player v6.4 or later for video, audio playback, Macromedia Flash v5.0 or higher for animation (except for version 6.0.47)

Minimum Bandwidth: 10BASE-T Ethernet network interface card (for use with media server) or 33.6-Kbps modem (for use with NetCD discs): 56.6 Kbps is required for Instant Advice

Browser(s) on which this program is compatible: Microsoft Internet Explorer v5.5 or later, Netscape Navigator v4.7x or 4.8x only (v6 and above not supported)

Compatible/Compliant: SCORM compatible, AICC compatible, Section 508 Compliant

The following Learning Management Systems have been tested and are compatible with this program: Docent 5.00, Thinq, Saba 3.50, Proprietary, Plateau, Saba 3.40, Saba, KMSI, TEDS, Aspen, Docent, Docent 6.00, Learn.com, Internet U, Net Learning, Cyber U, Lotus Learning Space, Meridian

OPAL® (Online Performance and Learning) from DDI

Modality: Electronic performance support system

Description: OPAL® is a comprehensive enhancement system developed specifically for intranet and Internet use. It provides day-to-day job performance and professional development learning via the user’s personal computer for access anytime, anywhere.

Performance Objectives

OPAL® helps associates:

- Receive just-in-time coaching and expert guidance on handling work situations.
- Learn and develop important business competencies.
- Access online skill-building exercises that provide hands-on learning.

Primary competencies developed: OPAL® supports 39 competencies from DDI’s High-Performance Library and can be customized to each organization’s needs.

System Overview: OPAL® includes hundreds of job aids, including action planners, surveys, interview worksheets, and discussion guides. The system features an individual development plan, multimedia enhancements, discussion areas, and a comprehensive competency library. With OPAL®, learners can set preferences with the “My OPAL®” feature.

OPAL® has two components: 1.) Advisor: Your Personal Resource for Handling Tough Work Situations™; and 2.) Developer: Your Online Mentor for Professional Development™.
Section II – Transfer and Maintenance of New Skills and Behaviors

COMPONENT OVERVIEWS

Advisor: Your Personal Resource for Handling Tough Work Situations™

This component provides a range of just-in-time learning resources for handling tough work situations. It includes practical tips and guidelines, 311 learning tools, and 215 topics separated into 16 groups. These topic groups are:

1. Change
2. Coaching
3. Collaborating
4. Conflict
5. Customer service
6. Decision making
7. Delegation
8. Developing yourself and others
9. Essential interpersonal skills
10. Influencing
11. Interviewing
12. Meetings
13. Performance management
14. Productivity
15. Stress management
16. Teams

In the optional multi-media edition of OPAL® Advisor, video and audio clips are provided for a more dynamic learning environment. (The multimedia content is optional to accommodate organizations that cannot stream video or audio across their intranets due to bandwidth limitations or policies.)

Developer: Your Online Mentor for Professional Development™

Developer helps employees hone their skills in any of 39 competencies from DDI’s High-Performance Library, including adaptability, building trust, coaching, decision making, innovation, and planning and organizing. Developer also offers 345 skill-building exercises to reinforce knowledge and transfer it to the job.


IMPLEMENTATION OPTIONS

Client-Site Server: OPAL® is installed on your server for access via your intranet.

Annual Per-Learner License (APLL): OPAL® is accessed via the Internet from DDI’s server by your organization for a low per-person license fee, which is renewed annually.

Hosted-Server Model: OPAL® is accessed via the Internet from a server hosted by DDI.

Follow-Through – An Essential Ingredient for Improved Performance

Fred Harburg, Senior VP of Leadership and Management Development for Fidelity Investments wrote in Chief Learning Officer magazine (March, 2004), “Our customers have little interest in classes, learning management systems, or blended learning. Their passion is for improved business performance.” “... We are not in the business of providing classes, learning tools, or even learning itself. We are in the business of facilitating improved business performance.”

Research has shown that pre-work contributes to the effectiveness of learning, and clearly, time spent in the learning experience is valuable. What is significant, based on this finding by Dr. Brent Peterson is that approximately 50% of the ultimate effectiveness of learning can be attributed to what happens after the learning experience ends.
Section II – Transfer and Maintenance of New Skills and Behaviors

Segmenting the Learning Process*

*Gathered from research conducted by Dr. Brent Peterson, CEO of The Work Itself Group
Chart courtesy of Zenger Folkman

In a recent webcast, we polled our audience to see how many of the participating organizations actively engaged in follow-through after training to ensure skill/behavior transfer. Only 19% of the respondents said they emphasize follow-through more than half the time. Why is there so little emphasis on skills transfer?

Respondents were then asked to comment on what gets in the way of effective follow-through after leadership training programs. Their answers shed more light on why so few organizations actively facilitate the link between learning and doing. They can be categorized as follows:

- Structural silos between training and management result in no consistent effort to integrate learning and performance. Training is viewed as an isolated event. The training department’s job is viewed as over once the program has been taken and the ‘smile sheet’ handed in. Managers are often unaware of the content and purpose of the training and therefore, little attention is paid to what happens as a result.

- There is a lack of incentives to bridge training to performance. Neither training departments nor managers are typically measured on whether training returns on its investment.

- Training lacks relevance to actual job environment. It would be tough to transfer training that doesn’t apply to the work. (Of course, we’re wondering why companies would conduct such training in the first place!)

- There is a lack of simple systems for consistent follow up and measurement of results. (We have good news on this one! There are some simple and cost-effective systems for follow-through to support skills transfer, two of which are profiled here.)

Question: How would your organization answer these questions?

Certainly, leaders themselves have the ultimate responsibility for their learning and its impact on their performance. Often leaders know what they need to do to improve, it’s in the execution that they fall down. Marshall Goldsmith has this to say,

Our research paints a compelling picture. People don’t get better because they go to ‘programs.’ They don’t get better because they listen to motivational speeches. They only get better if they pick something important to improve, involve the people around them and follow up in a disciplined way. Long-
Section II – Transfer and Maintenance of New Skills and Behaviors

term change in leadership effectiveness takes time, follow-up and discipline – not just understanding.33

This section will profile two transfer management systems available to organizations to support active follow-through of training once participants have returned to the workplace. They are Friday5s® by Fort Hill Company and ActionPlan Mapper™ by Zenger Folkman. In controlled trials conducted by Fort Hill and its clients, the use of their transfer management system increased the amount of post-course effort, the number of discussions with the manager, and the degree of improvement as perceived by both the program participants and their managers.

We’ll start with the characteristics that both of these systems share. Then we’ll look at each one briefly.

Both of these online solutions are:

- Delivered via Application Service Provider model (ASP), which means the software is hosted on the vendors’ servers. This means little to no involvement of your IT staff in the process and no investment in software/hardware/staff.
- Very user-friendly and intuitive
- Cost-effective
- Easy and quick to implement
- Highly customizable
- Effective at capturing goals set in any training program, or project
- Systematic in their reminders and tracking of progress, plans, modifications, milestones
- Catalysts for increased coaching/feedback conversations
- Priced based on number of users and the length of follow-through
- Helpful in providing reports to management and training administrators to see how and if the training is being transferred
- Flexible enough to be used as simple performance management systems or project tracking systems

TRANSFER MANAGEMENT SYSTEMS

Friday5s® by Fort Hill Company

Cal Wick is founder and CEO of Fort Hill Company. He conceived of the idea of building a follow-through management tool six years ago as a result of some research he was doing to evaluate the effectiveness of an award-winning training program. What he came to find was that most people never got back to the objectives they had declared in the program, despite their best intentions. He realized that much of the potential value of the training was being lost, and that application of training had to happen quickly if it was going to happen at all. He acknowledged that high-level skills need lots of practice and feedback if they are to lead to mastery. He also recognized that from his own experience, one of the only things he seemed to stay up-to-date with was his anti-virus software, because he was sent active reminders.

Friday5s® is the manifestation of his commitment to bridging the learning-doing gap. The name came from the notion that a person can do his/her progress update every Friday by 5pm in a matter of five minutes. This tool has been in use for five years, by over 100 client companies and 30,000 users. It is currently on its 4th version. In addition,
Development Engine® was created by Fort Hill using the same principles as Friday5s®, but focusing on an individual’s entire development plan, versus association with a specific training program. This profile focuses on Friday5s®. For more information on Development Engine®, contact Fort Hill Company directly.

As of 2005, The Center for Creative Leadership has added Friday5s® as follow-through for its Leadership Development Program (LDP®). Ken Blanchard is using it after Situational Leadership II®. In Europe, ASK and the London Business School have each adopted Friday5s® to help their clients increase ROI by improving learning transfer.

Fort Hill developed Friday5s® to help actively manage and maximize the training and development investment by:

- Capturing the goals committed to in a learning experience
- Reminding participants of goals and expectations
- Involving managers and coaches
- Continuing the learning community
- Prompting reflection and planning
- Tracking progress and results

**Goal capture:** Friday5s® is configured prior to the training program and key competency areas are identified. Participants are informed of the expectations for follow-through during the training program and are given a template for expressing their goals for impact back on the job. Fort Hill then enters each participant’s goals into the Friday5s® system to provide a strong starting place for follow-through. A copy of the goals can be sent automatically to the participant’s manager and/or coach for feedback.

**Reminding participants of goals and expectations:** Clients determine the frequency of contact and duration of time participants will use the follow-through program. Participants receive reminder emails as prompts to document their progress on the goals to which they’ve committed. Additional reminders are sent to those who do not complete their updates within a defined period.

**Involving managers and coaches:** The tool invites participants to request feedback and coaching from one or more managers or other identified coaches as they progress through their learning application. The managers or coaches receive a link to the person’s report to provide context to their request for help. Responses are sent back to participants and are added to their updates for later reference. Research has shown an increase in performance conversations (live and online) as a result of using Friday5s®. The online dialogue is captured and available through the reporting features of the tool. All progress updates are forwarded to managers and/or coaches.

**Continuing the learning community:** Group members can view each other’s insights, actions and best practices, extending shared learning to the workplace. They can also communicate with each other through the tool and provide peer coaching.

**Prompting reflection and planning:** For each goal, users are prompted to respond to the following questions:

- What have you done?
- How far did you get?
- What are you going to do next?
- What has been your most important insight since your last update?
Section II – Transfer and Maintenance of New Skills and Behaviors

These questions can also be customized to better address the uniqueness of a particular learning solution. For users who are stuck with what to do next, the tool has “Guide Me” suggestions for next steps that are specific to each goal category.

Summative questions can be asked on the final update to document Level 3, 4 and 5 results such as specific accomplishments or estimates of value generated. Questions can also be asked to collect ideas for continuous improvement in the training process.

TRACKING PROGRESS AND RESULTS

LeaderView™ provides program directors and managers a dashboard of key metrics and numerous reports that track and document progress on goals, frequency and timeliness of updates, number of coaching interactions etc.

Cost of Friday5s®

Fort Hill likes to point out that the most expensive follow-through option is to do nothing. As for pricing, there are a variety of options to choose from. Typical cost is $100-$200 per person, depending on the size and complexity of the program and duration of follow-through. There is a one-time set up fee, which includes consultation on implementation and best practices and customization to support the specific program’s content and objectives.

ActionPlan Mapper™ (AP/M) by Zenger Folkman

Jack Zenger and Joe Folkman have both been in the learning and development industry a long time. In 2003, they created Zenger Folkman - a leadership training and consulting firm to work with companies to implement leadership development based on the findings published in their book called The Extraordinary Leader. They launched a training program by the same name. (See page 307 for a summary of this program). In developing and delivering this program, they found themselves asking: How do we maintain momentum? How do we hold learners accountable for taking action and drive critical follow-up activities? How do we make follow-up plans and progress visible?

In response to these questions, they developed ActionPlan Mapper™. Version 1 was launched in October 2004. As of the writing of this guide, they are launching version 2.7, have dozens of client companies using the tool and hundreds of users. This transfer management system is based on more of a ‘self-serve’ model, in which clients can quickly and easily configure the system to meet their own needs, based on a highly user-friendly interface.

Their system supports:

Goal Capture - Participants enter their own goals from the program and are then able to modify and close the goals when they’ve been achieved or abandoned. A history of modifications is maintained.

Reminding participants of goals and expectations - The client determines the frequency of reminder emails and duration of the project. The client, using a simple tool that is provided, creates the progress update form. Zenger Folkman provides guidance in the process.
Involving managers and coaches - Zenger Folkman stresses the importance of manager commitment to the follow-through process. They recommend managers meet with direct reports after every update to talk about the progress that is being made and offer their assistance. Currently, their system does not manage electronic communication between managers and participants. There are plans to add this functionality in fall, 2005, along with a survey mechanism for getting feedback from others on how one is progressing on a goal.

Continuing the learning community - Generally, goals and progress updates are shared only between participants, their managers and the HR administrator. There is the opportunity to configure this tool so that all members of a group or training program can share their goals and progress updates. Participants can also mark certain goals ‘private’ so that no one can view them beyond the participant who entered them.

Prompting reflection and planning - Standard questions are provided. They can be modified or replaced by the client’s choices.

Tracking progress and results - The system provides bi-directional views of the data. Each manager has a screen with all direct reports listed and all of the AP/M projects they are working on. They can then drill down into any particular project and see the individual’s goals page with updates.

For the HR or training administrator, they can view the information from a project basis to see how participants are doing. Several reports are available that can show how many goals have been set, how many updates entered, and the progress on goals.

It gives the HR professionals, and those responsible for administering the leadership development effort necessary information to fine-tune the developmental effort. The information collected is of further help in selecting appropriate content for further developmental activities.

Cost of ActionPlan Mapper™
ActionPlan Mapper™ costs less than Friday 5s®, which makes sense; given it has less functionality at the present time. Client companies can license this follow-through management tool annually or by project for various time frames. Unlike Fort Hill Company, there is no set customization fee given that clients themselves can quickly and easily configure the templates provided. Training on how to build out the templates is included in the subscription price (minimum 20 participants).
AchieveGlobal

8875 Hidden River Parkway, Suite 400  Additional office locations continued:
Tampa, Florida 33637  440 East Swedesford Road, Suite 3040
877-651-0825  Wayne, PA 19087
http://www.achieveglobal.com  610-293-4389

Additional office locations:
425 North Martingale Road, Suite 400  7200 Bishop Road, Suite 280
Schaumburg IL 60173  Plano, TX 75024
847-619-2380  972-769-4000

170 West Election Road, Suite 201  Other locations: 44 offices worldwide
Draper, UT 84020  Sales contact:
801-523-5500  Information Center
88 Kearny Street, Suite 1300  877-651-0825
San Francisco, CA 94108
415-217-2660

FINANCIAL PROFILE
Ownership/Funding: Privately held
Mergers/Partnership/Formal Alliance Activity: AchieveGlobal currently works with 10
alliance partners in the industry: Advantis Research & Consulting, Communispond, ESI
International, Executive Conversation GP (General Physics), IPS (Integrated
Performance Systems), NHCG (New Haven Consulting Group), Paradigm Learning,
Select International, and SMG (Strategic Management Group).
Annual fiscal revenue: 2 Years Ago: $75 million+; Last Fiscal Year: $75 million+

EMPLOYEE PROFILE
Total number of employees worldwide: 1,000
Years in business: 20+; Years as a leadership training vendor: 20+

COMPANY PROFILE
Customer Service infrastructure/philosophy: To consistently deliver knowledgeable
solutions and support in a caring and professional manner, and to ensure all customers
feel confident in their ability to provide exceptional defining moments throughout their
service experience. To accomplish this goal, AchieveGlobal has aligned resources
within sales, sales support, and customer service to work together and present one
consistent view to their customers. Whether customers facilitate their own training
sessions, use AchieveGlobal's resource pool of Training Performance Consultants for
delivery, utilize the e-Learning capabilities, or a blended learning approach, they provide
various levels of support to meet the needs of all customers.
Client forums or advisory boards: AchieveGlobal has a dedicated research
department. They are constantly surveying the marketplace - through customer
questionnaires, market research, advisory boards, product testing and other methods.
Leadership development philosophy: In today's business environment, employees
look to their leaders to do the right thing, especially when shrinking resources tempt
them to choose expediency over ethics. People want leaders who get results but, they
also want leaders with honorable intentions and who prove themselves to be honorable.
Employees today expect their leaders to demonstrate both technical and interpersonal
skills. There seems to be a need for leaders to perform tasks they once delegated, as
well as to manage employees under stress from cutbacks and shrinking budgets. There is an increased expectation for leaders to be big-picture thinkers who are able to foresee the future and anticipate the consequences of their actions. These revelations of what today’s employees expect of their leaders led AchieveGlobal to not only a new view of leadership, but also to a new view of the training required to develop what they now call "genuine leaders." Achieving Results through Genuine Leadership is a comprehensive, unified system that provides targeted training for every level of the organization, from individual contributors (Deliver Level) to supervisors (Develop Level) to leaders of leaders (Direct Level) and on to executives (Define Level). Each level receives unique training matched to the demands of that organizational role. Further, all levels receive a grounding in a common leadership language and philosophy based on what they call “The Principles and Qualities of Genuine Leadership.” As a result, people at every level work with a shared set of assumptions about the qualities, practices, and specific skills of outstanding leaders.

The three aspects of a leadership program design that are most important to its success and effectiveness are:

1. **Learner involvement.** Whether learners are new or veteran leaders, all are adults with relevant work and life experiences. Effective design therefore gives learners ample opportunity to share insights about the general topic and the specific content embodied in varied learning activities and media. These design elements engage learners, allow frequent opportunities to contribute to and learn from the group, build group ownership of the training content, and promote individual commitment to apply new skills in the workplace.

2. **Structured practice.** Only live practice and targeted feedback can build learner confidence to apply new skills in the workplace. To avoid repetitive design and appeal to multiple learning styles, AchieveGlobal leadership programs contain a range of activities that allow learners to try new skills in a risk-free setting. Some examples are trio or pairs practice based on a real or fictional work situation, mini-practice opportunities isolating segments of a complex skill, competitive or game-based activities, and simulations requiring skill use to achieve a larger goal.

3. **Skill transfer to the job.** A chief benefit of all AchieveGlobal training is new workplace behaviors that improve business results. Their leadership programs contain both standard and unique activities that clarify post-training actions or build individual commitment to taking those actions. In the primary training, learners plan skill use in a future situation, complete and share an "Insight & Action" page, commit publicly to specific actions they’ll take, and so on. Later, follow-up practice and application sessions reconvene the group to hone skills, review content, and identify new ways to apply skills.

**LEADERSHIP TRAINING DELIVERY METHODS**

Classroom training is offered. There is currently 1 public, open enrollment leadership program – Principles & Qualities of Genuine Leadership (plus all client trainer certifications are open-enrollment). There are 33 client-sponsored off-the-shelf programs available, and hundreds of distinct custom-designed programs were conducted last year.

There are 23 distinct e-Learning programs available to clients. Stand-alone leadership training products are not offered. Most programs can combine both classroom and e-Learning modules. The majority of AchieveGlobal training solutions are delivered via client-certified trainers and through program licensing arrangements.
STANDARD ANSWERS FOR ALL TRAINING SOLUTIONS

Most common industries represented by clients:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Customization: 4 levels of customization are offered.

Level 1: Customization of Stand-Alone Program Supplements - This includes customization of pre-work materials, leader-led exercises, role plays, practice sessions, job aids, and case studies that do not affect the participant text or facilitator materials. In Level 1, no changes are actually made to the program book/text; the custom materials are standalone supplements.

Level 2: Client-Specific Program Materials - This second level involves the integration of custom examples, role-plays, practice sessions, and case studies within an existing standard program, plus any or all of the materials customized as part of Level 1. It may include custom video for interactive practice.

Level 3: Content and Structural Re-Design - In Level 3, we combine modules from various programs, link organizational initiatives within the training, and include items customized in Level 1 or 2. (This could mean combining skill models from the same line of business or different lines of business.) This level requires a design document and can be quite complex.

Level 4: Custom Creation - The development of new, stand-alone content not derived from existing AchieveGlobal skill models. Level 4 projects require the involvement and approval by the Sales and Services VP's to ensure the project reflects the type of business they want to pursue.

The program design includes the following components:
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%
- Case Studies 20%

Pre-assessments: Level III surveys that measure the use of module-specific skills are administered before and after training both to training participants and to others who regularly observe the participants' behaviors. Costs dependent on implementation needs.

Prerequisites: There are no prerequisites for any AchieveGlobal program.

Delivery options: AchieveGlobal trainers/consultants deliver the program; co-facilitation with client trainers is available as are train-the-trainer programs and program licensing.

Pre-work/Post work: There is no pre-work. Post-work consists of application and follow-up skills practice based on the kits provided through AchieveGlobal and included in program licensing fees.

Languages in which training solutions are currently offered: U.S. English, U.K. English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese, Thai, Polish

Countries in which training solutions are currently offered: Argentina, Finland, Korea, Russia, Australia, France, Malaysia, Singapore, Austria, Germany, Mexico, South Africa, Belgium, Greece, Middle East, Spain, Bermuda, Hong Kong, Netherlands,
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Sweden, Brazil, Hungary, New Zealand, Switzerland, Canada, India, Norway, Taiwan, Chile, Indonesia, Philippines, Thailand, China, Ireland, Poland, United Kingdom, Czech Republic, Italy, Portugal, United States, Denmark, Japan, and Romania.

**Standard materials provided:** Facilitator kit includes video, guide, wall charts, activity materials, participant workbook

**Reinforcement/Follow-up options:** For the majority of AchieveGlobal programs, they offer a Skills Practice session facilitator guide—a fully scripted lesson plan for a repeatable, classroom-based, 1 hour follow-up skills practice session. In addition, each guide includes tips and best practices on how to conduct skills practice sessions using collaborative software. Printed in the facilitator guide for each workbook and module are reinforcement tools such as self-surveys, follow-up messages, and engaging challenges. These tools can be photocopied and distributed to learners after training on a weekly or monthly basis to help keep the concepts and skills fresh in the participants’ minds.

Facilitators can also go to www.achieveglobal.com and download electronic versions (using the Adobe Acrobat PDF format), which can be incorporated into emails to learners. The license for using these tools is included in the classroom participant fee.

**Standard way to measure program effectiveness and individual behavior change:**

AchieveGlobal conducts evaluations to describe both the implementation of training and the outcomes achieved. We use the information about the implementation of training and early indicators of goal achievement to identify ways to improve the training initiative and the ultimate results. We measure outcomes by comparing post-training performance to pre-training levels of performance and performance by groups not participating in the training, or agreed upon objectives or criteria.

**Other measurement options offered:**

**Level I – Evaluation.** AchieveGlobal offers an instrument for evaluating training readiness and support for training within the organization. This evaluation tool helps identify potential barriers to effective training implementation and acquisition of skills in order to ensure that learners are prepared for training and optimize the training process itself. This instrument is available online and is administered at the beginning of the first class.

AchieveGlobal provides Program Module Evaluations or end-of-class feedback forms to evaluate learners’ reaction to the training experience by measuring the extent to which they enjoyed it and felt it had value. The instrument is included in the training materials.

Also, they have an instrument to evaluate the support for applying skills in the work environment. This evaluation tool helps to identify potential barriers to behavior change and performance improvement. This instrument is available online and is administered between three and five weeks following the completion of training.

**Level II – Evaluate the mastery of course content.** AchieveGlobal provides mastery tests as part of each training module along with an evaluation tool for scoring and interpretation to determine the extent to which learners understood and retained the information provided in the training class. The test is available electronically or in hard copy format and is self-administered and self-scored shortly after training.

**Level III – Evaluate the behavior change of learners.** AchieveGlobal uses a web enabled survey process to evaluate the extent to which the training resulted in desired behavior change in the workplace. Surveys that measure the use of module-specific skills are administered before and after training to participants and to others who regularly observe the participants’ behaviors. By offering this “multi-rater” approach, they
are able to offer a more complete and accurate picture of the skills learned in training and how well those skills are being put to use on the job.

**Level IV – Evaluate the business impact of behavior change.** When customers want outcome evaluations about business impact, the Consulting group designs the evaluation to use existing data effectively. The goal is to provide trustworthy data, answer the outcome questions as efficiently as possible and create comparisons that are robust in their ability to identify impacts.

**Five Phases of the AchieveGlobal Learning Formula:** Regardless of media, traditional or high-tech, blended or otherwise, the training produces sustained behavior change by guiding learners through five phases of the AchieveGlobal Learning Formula. Briefly described, the AchieveGlobal Learning Formula guides learners as they:

**Phase 1 - Commit to learn.** The learner must be motivated to learn and to change his or her behavior. During the central training experience, learning activities and media illustrate how new skills, knowledge, and attitudes help learners address job-related issues and achieve job-related goals. This phase succeeds when learners open themselves to new possibilities and resolve to master and apply essential interpersonal skills.

**Phase 2 - Assess current performance.** A carefully crafted survey helps learners measure current levels of knowledge and application of a key interpersonal skill. Recognizing their own performance gaps further motivates learners and helps them focus effort in areas for improvement. Post-training assessments measure recollection of training content and skill use in the workplace.

**Phase 3 - Acquire knowledge.** Learners encounter the cognitive details of a distinct interpersonal skill through presentation, reading, discussion, observation and analysis of realistic examples, simulations, and other activities. Typical content includes environmental cues that prompt skill use; a sequence of behavioral steps; relevant terms; examples of use and absence of use; and tips, tactics, and pitfalls for each step.

**Phase 4 - Develop competence through practice.** The training of interpersonal skills requires rehearsing the new skills in order to achieve competency. This real-time practice with another human being, whether face-to-face, voice-to-voice or online, is essential to soft-skill mastery. In a safe setting, learners rehearse the skill, receive constructive feedback, and observe others using the skill, then offer constructive feedback. The goal of this is to develop baseline competence and build confidence.

**Phase 5 - Apply new learning.** Integrating new skills into job interactions requires commitment. A range of activities, discussions, testimonials, printable online planners, and others give learners the clarity and resolve to apply their knowledge and skills. Managers of trainees can also reinforce and sustain skill application through coaching, recognition of skill use and modeling the skills. Because all of our offerings are available both in classroom and e-Learning options, the ratio of blending varies from 0% to 100%.

**Percentage of each instructional technique used for e-Learning component:**
- Audio 20-39%
- Video <20%
- Static Pages <20%
- Simulations 20-39%
- Scenarios 20-39%
- Quizzes 20-39%
Help Desk Support: Monday – Friday, 7:00 am – 5:00 pm MST; Available in English; In-house

Operating systems on which this program is compatible: Windows 98, 2000, NT, ME, XP

Required plug-ins: Flash

Minimum bandwidth: Dial up

Browsers on which this program is compatible: IE Explorer 5x, 6x, SCORM compatible, AICC compatible

Section 508 – Non-compliant

Additional information: AchieveGlobal’s asynchronous (self-paced) web-based products follow AICC Appendix A and Appendix B standards and can be easily integrated by clients into most major Learning Management Systems

### PROGRAM INFORMATION

**Accelerating Team Productivity**

*Modality:* Classroom training, e-Learning or Blended learning series of 4 modules

**The single most important skill/competency area addressed in this program is:**
- High Performing Teams

**The secondary skills/competency areas addressed in this program are:**
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management

**Course description:** Today's teams are expected to produce more than ever before, faster than ever before. Leaders are faced with the dilemma of developing enhanced teamwork along faster and faster timelines. As a result, this workshop is designed to help leaders focus teams on key results and outputs, build energy and momentum toward achieving goals, negotiate on their team's behalf, and handle difficult dynamics within a team that impact performance. This curriculum has been in existence since September 2004.

**Participant profile:** The primary audience includes Supervisors and/or front-line managers. The secondary audiences include Mid-level managers and High potential leaders.

**CURRICULUM COMPONENTS**

**Component 1 - Building Team Pride & Purpose**

*Modality:* Classroom training or asynchronous (self-paced) web-based

*Description:* This module provides team leaders with the principles and skills that instill high degrees of pride and purpose in their teams. It explores today's workplace challenges and the need for accelerating performance through teamwork.

*Duration:* 4 hour classroom or 90 minute web-based version

*Stand-alone available:* Yes

**Component 2 - Developing Team Agility: Day-to-day Tools**

*Modality:* Classroom training or asynchronous (self-paced) web-based

*Description:* This module focuses on the strategies team leaders can use and actions they can take to build high levels of team agility: quickness, flexibility, and adaptability.

*Duration:* 4 hour classroom or 90 minute web; *Stand-alone available:* Yes

**Component 3 - Resolving Conflicts within Your Team**

*Modality:* Classroom training or asynchronous (self-paced) web-based
Description: This module focuses on handling tricky situations that often develop between team members. It provides the skills and tools for team leaders to intervene directly or to support team members in addressing these situations on their own.

Duration: 4 hour classroom or 90 minute web; Stand-alone available: Yes

Component 4 - Negotiating Resources for Your Team

Modality: Classroom training or asynchronous (self-paced) web-based

Description: This module provides participants with the negotiating skills they need to secure resources for their teams. Further, participants learn to negotiate solutions that work for all parties involved.

Duration: 4 hour classroom or 90 minute web; Stand-alone available: Yes

Bridging Strategy to Outcomes

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Increasing Performance of Others/Performance Management.

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Building Partnerships and Alliances

Course description: This workshop helps mid-level and senior managers build commitment and focus effort at every organizational level. Participants master and apply key interpersonal skills, fine-tuned and framed for this audience. At the end of the workshop participants will be able to: Seek out, clarify, and confirm ideas and information; Describe organizational issues and strategy in a compelling way; Recognize the challenges and benefits of giving constructive feedback; Focus individual action on issues through feedback; Explore useful ideas for turning strategies into action; and Lobby for the support and resources they need to address key organizational issues. In addition, participants learn to apply these skills in combination to improve productivity, execute strategy, develop performance, create networks, and retain talent. This program has been in existence since September 2003.

Formal third party recognition and/or awards: The Communicator Award of Excellence, Honorable Mention 2003

Participant profile: The audience includes Directors, VPs and Mid-level managers.

Duration: 2 days

Coaching Others for Top Performance

Modality: Classroom training, e-Learning or blended series of 4 modules

The single most important skill/competency area addressed in this program is:
- Coaching Skills.

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Building Positive Relationships with Others
- Talent Management (Recruiting/Retaining/Developing Others)
Course description: This series of 4 modules explores the principles and qualities of genuine leadership and focuses on developing skills that can help participants perform daily coaching activities. This workshop provides participants with skills that help build constructive relationships that gain a stronger commitment to improving performance and achieving results that make a difference for the organization. This curriculum has been in existence since September 2003.

Formal third party recognition and/or awards: 2003 APX Award - Training Magazine

Participant profile: The primary audience includes Supervisors and/or front-line managers. The secondary audiences include Mid-level managers and High potential leaders.

CURRICULUM COMPONENTS

Please note: This series of 4 modules can be taken all in a classroom format, all in asynchronous (self-paced) web-based format, or a combination of the two to create a blended curriculum.

Component 1 - The Principles and Qualities of Genuine Leadership
(Manager's Version):

Modality: Classroom training or asynchronous (self-paced) web-based

Description: This module outlines the universal leadership principles and qualities that help individuals become genuine leaders that can translate intentions into reality. The purpose of this module is to help participants achieve results for their organizations by applying the Principles and developing the Qualities of Genuine Leadership and applying them to their role as a coach.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version.

Stand-alone available: Yes

Component 2 - Providing Constructive Feedback

Modality: Classroom training or asynchronous (self-paced) web-based

Description: The purpose of this module is to provide skills that will let participants provide constructive feedback in a way that builds openness and mutual respect, and promotes problem solving and learning.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

Component 3 - Developing Others

Modality: Classroom training or asynchronous (self-paced) web-based version

Description: The purpose of this module is to provide skills for developing others, thereby helping others expand their capabilities so they will have the confidence to take on new challenges and work more independently.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

Component 4 - Giving Recognition

Modality: Classroom training or asynchronous (self-paced) web-based version

Description: This module helps coaches learn how to acknowledge accomplishments in ways that will inspire excellent performance. The purpose of this module is to provide participants with skills for recognizing and reinforcing the behaviors that support and lead to the right results.
**Connecting with Others: Listening and Speaking**

*Modality:* Classroom training, e-Learning or Blended learning series of 2 modules

The single most important skill/competency area addressed in this program is:
- Communication Skills

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others

**Course description:** This workshop will help participants learn how to listen effectively, identify and cultivate good sources of information and master the process of encouraging people to share their knowledge. It also enables employees to have a positive impact on the organization by focusing on their presentation skills, regardless of audience size. Modules include: 1.) Listening in a Hectic World (4 hour module). This module will help participants learn to make conscious and deliberate choices about how they focus their time and attention so they can consistently extract what they need from listening situations and opportunities. 2.) Speaking to Influence Others (4 hour module). In this module, participants consider strategies and approaches for ensuring that what they say to others has the greatest possible impact in the most efficient way. Participants learn how to ‘package’ their messages to get results in today’s work environment where time-starved employees are continually bombarded with competing requests for their attention. They will learn and practice techniques for expressing themselves concisely and effectively in a variety of situations from informal interactions to large group meetings. This curriculum has been in existence since December 2004. The date of last significant update/revision (defined as >=30% content revision) is 12/15/2004.

**Participant profile:** The primary audiences include High potential leaders and Supervisors and/or front-line managers. The secondary audience includes Mid-level managers.

**CURRICULUM COMPONENTS**

*Please note:* 2 half-day modules make up this 1 day classroom training workshop or 1 module can be delivered via classroom training, the other via e-Learning. In addition, the modules can also stand-alone.

**Component 1 - Listening in a Hectic World**

*Modality:* Classroom training or asynchronous (self-paced) web-based version

*Description:* This module will help participants learn to make conscious and deliberate choices about how they focus their time and attention so they can consistently extract what they need from listening situations and opportunities.

*Duration:* 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

*Stand-alone available:* Yes

**Component 2 - Speaking to Influence Others**

*Modality:* Classroom training or asynchronous (self-paced) web-based version

*Description:* In this module, participants consider strategies and approaches for ensuring that what they say to others has the greatest possible impact in the most efficient way. Participants learn how to ‘package’ their messages to get results in today’s
work environment where time-starved employees are continually bombarded with competing requests for their attention. They will learn and practice techniques for expressing themselves concisely and effectively in a variety of situations from informal interactions to large group meetings.

**Duration:** 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

**Stand-alone available:** Yes

### Managing the Performance of Others

**Modality:** Classroom training, e-Learning or blended learning series of 4 modules

**The single most important skill/competency area addressed in this program is:**
- Increasing Performance of Others/Performance Management

**The secondary skills/competency areas addressed in this program are:**
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Building Positive Relationships with Others
- Talent Management (Recruiting/Retaining/Developing Others)

**Course description:** As the manager, supervisor, or leader of a work group or team, performance leaders help others do the work that ultimately makes an organization successful. Performance leaders are responsible for guiding and directing the performance of their employees. To accomplish this they must ensure employee performance aligns with the direction and strategy of the organization. This workshop focuses on the performance management aspects of a manager’s role. The skills taught in this workshop help participants prepare for - and conduct - different types of performance-related discussions. During the two-day workshop, participants take part in a variety of engaging individual and group activities, video demonstrations, role-plays and partner and large-group discussions. They have fun as they gain familiarity and confidence with the new concepts and skills. This curriculum has been in existence since September 2003.

**Formal third party recognition and/or awards:** The Communicator Award of Excellence, 2003 APX Award, and Training Magazine, 2003

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

### CURRICULUM COMPONENTS

**Please note:** These 4 modules can be combined into a 2-day classroom training program, or delivered as a series of e-Learning modules or combined for a blended learning approach.

**Component 1 - Planning for Performance Discussions**

**Modality:** Classroom training or asynchronous (self-paced) web-based version

**Description:** By effectively planning for performance related discussions, managers establish a framework within which they can set mutual expectations, address performance issues and help people respond to new developments. The purpose of this module is to provide participants with the skills and tools to prepare for performance-related discussions that increase productivity, collaboration and the achievement of critical goals.

**Duration:** 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version
Stand-alone available: Yes

**Component 2 - Clarifying Performance Expectations**
*Modality:* Classroom training or asynchronous (self-paced) web-based version
*Description:* The ability to set and reset performance expectations swiftly and in a straightforward manner is a critical skill for all performance leaders. This module provides a process for handling conversations about work expectations in a way that reduces ambiguity, increases trust and strengthens the working relationship between manager and employee. The purpose of this module is to provide participants with the skills to discuss performance expectations with others in a way that gains their commitment and sense of ownership.
*Duration:* 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

**Component 3 - Correcting Performance Problems**
*Modality:* Classroom training or asynchronous (self-paced) web-based version
*Description:* Leaders must ensure that everyone takes responsibility for performing his or her job as effectively as possible. Employees need training and coaching so they can manage their own performance. When these approaches aren’t enough, leaders need to step in and take prompt and decisive action. The purpose of this module is to provide participants with skills for addressing recurring or serious performance problems to get an individual’s performance back on track and to build motivation for further improvement.
*Duration:* 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

**Component 4 - Conducting Performance Reviews**
*Modality:* Classroom training or asynchronous (self-paced) web-based version
*Description:* This module presents a collaborative approach to the formal performance review. Participants learn how to prepare employees for a review, how to manage expectations during the session, and how to create an atmosphere that encourages openness about concerns and plans for the future. The purpose of this module is to provide participants with skills and tools to conduct a collaborative performance review that focuses on major responsibilities, opportunities for improvement, and development needs.
*Duration:* 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

**Maximizing Your Supervisory Potential**
*Modality:* Classroom training, e-Learning or blended series of two modules

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others
- Building Partnerships and Alliances

*Course description:* As a result of the business environment in which they operate, new - and even tenured - supervisors frequently find themselves performing an awkward and uncomfortable organizational balancing act. They must daily strive to balance...
between multiple elements of their job responsibilities. This curriculum has been in existence since December 2004.

**Participant profile:** The primary audience includes Directors, VPs, Supervisors and/or front-line managers. The secondary audience includes Mid-level managers and High potential leaders.

**CURRICULUM COMPONENTS**

*Please note:* We recommend the 2 modules taken in a 1 day format, but if necessary they can be taken as stand alone modules.

**Component 1 - The Hallmarks of Supervisory Success**

*Modality:* Classroom training or asynchronous (self-paced) web-based version  
*Description:* This module provides an awareness of topics such as approachability, generational differences, dealing with sensitive information so that new supervisors are cognitively prepared to make the transition into management.  
*Duration:* 4 hour classroom training version or 90 minute web-based version  
*Stand-alone available:* Yes

**Component 2 - Delegating for Shared Success**

*Modality:* Classroom training or asynchronous (self-paced) web-based version  
*Description:* In this module, participants explore the equation that adds up to delegation success, including thorough planning, clear communication, and effective follow-through, which together result in successful delegation of work.  
*Duration:* 4 hour classroom training version or 90 minute web-based version.

**Problem Solving Results: Solutions, Improvements and Innovations**

*Modality:* Classroom training or e-Learning  
*The single most important skill/competency area addressed in this program is:* 
  - Problem Analysis/Problem Solving  
*The secondary skills/competency areas addressed in this program are:* 
  - Strategic Thinking/Decision Making  
  - Creativity and Innovation  
*Course description:* Clearly, the ability to generate innovative solutions to workplace problems is more important than ever. But how do you create the energy to implement these solutions in a climate where resources are scarce and people are already overworked? This workshop provides participants with the skills and strategies required to find appropriate problem solutions and the energy to implement them. This program has been in existence since August 2004.

**Participant Profile:** The primary audience includes High potential leaders and Supervisors and/or front-line managers. The secondary audience includes Mid-level managers.  
*Duration:* 2 day classroom training version or 6 hour web-based version

**The Principles & Qualities of Genuine Leadership**

*Modality:* Classroom training or e-Learning  
*The single most important skill/competency area addressed in this program is:* 
  - Building Positive Relationships with Others  
*The secondary skills/competency areas addressed in this program are:* 
  - Motivating/Inspiring/Engaging Others  
  - Communication Skills
Appreciating Diversity

Course description: More than ever, everyone in the organization needs a deep knowledge of leadership best practices and help in tailoring those practices to their own situations. To meet this need, this module outlines the universal leadership qualities and principles that help individuals become genuine leaders who can translate intentions into reality. Participants learn about five critical leadership qualities that contribute to personal and organizational success, and discuss them as related to key business issues. They also learn six Basic Principles that can help them develop effective relationships. This course is recommended (not required) as a foundation for the other leadership offerings available through AchieveGlobal. This program has been in existence since September 2003.

Formal third party recognition and/or awards: APX Award, Training Magazine 2003

Participant profile: The audience includes all management levels equally.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Both public and client-sponsored programs are available for this offering.

Working Through Emotions and Conflict

Modality: Classroom training or e-Learning

The single most important skill/competency area addressed in this program is:

- Conflict Resolution

The secondary skills/competency areas addressed in this program are:

- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Building Positive Relationships with Others

Course description: This series of 2 modules will prepare participants for the emotionally complex situations common in today's work environment. It also helps people use conflict to create a collaborative environment in which people contribute their best thinking. This program has been in existence since December 2004.

Participant profile: The primary audience includes High potential leaders and Supervisors and/or front-line managers. The secondary audience includes Mid-level managers.

CURRICULUM COMPONENTS

Please note: These modules can be delivered together as a 1-day classroom experience or as 2 modules of e-Learning, or a blend of the two.

Component 1 - Addressing Emotions at Work

Modality: Classroom training or asynchronous (self-paced) web-based version

Description: This module will provide participants with the skills for managing emotions in the workplace to prevent runaway emotions and remain focused and productive toward organizational goals.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes

Component 2 - Resolving Conflict with your Peers

Modality: Classroom training or asynchronous (self-paced) web-based version
Description: This module will provide participants with a model for the effective management of conflict to result in increased collaboration, innovation, problem solving, and productivity in the workplace.

Duration: 4 hours for classroom module or 90 minutes for asynchronous (self-paced) web-based version

Stand-alone available: Yes
American Management Association International

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<tbody>
<tr>
<td>1601 Broadway</td>
<td>AMA Atlanta Executive Conference Center</td>
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<tr>
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**FINANCIAL PROFILE**

**Ownership/Funding:** Not-for-profit

**Annual fiscal revenue:**
- 2 Years Ago - $75 million +
- Last Fiscal Year - $75 million +

**Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):**
- 2 Years Ago - $10-$19 million
- Last Fiscal Year - $10-$19 million

**Percentage of revenue from leadership offerings delivered outside the U.S.:** 16-20%

**Profitability based on last fiscal year:** GAAP profitable

**EMPLOYEE PROFILE**

**Total number of employees worldwide:** 527

**Total number of employees delivering leadership training solutions:**
- Based in U.S. - 0

**Total number of certified contractors delivering leadership training solutions:**
- Based in U.S. - 45;
- Based Internationally - 45

**Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:**
- 10 years of professional experience including corporate management development and leadership.

**Total number of developers of leadership training solutions:** 10

**ORGANIZATION TENURE**

**Years in business:** 20 years +

**Years as a leadership training vendor:** 20 years +

**CLIENT PROFILE**

**Number of client companies who purchased leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.):** 2,000
Top 5 client companies:
1. Cooper Tire
2. Capital One
3. Bristol Myers Squibb
4. Amgen
5. Mercedes Benz USA

Top competitors:
1. Center for Creative Leadership
2. College and University executive education programs
3. Linkage

Customer Service infrastructure/philosophy: AMA has a telesales and customer service staff of 100 employees that ensure customers have the best positive experience before, during and after the seminar. AMA also has five state-of-the-art executive conference centers in the US that can accommodate the very latest corporate training needs. It also uses other conference centers throughout the country to bring AMA training close to its customers.

AMA has 16 advisory councils comprising more than 500 senior executives who represent a wide range of industries. Participants meet regularly to identify new subject areas and trends for future AMA seminars, conferences and publications, and to keep abreast of the latest innovations and challenges as seen by their peers.

AMA field sales representatives meet with clients and potential clients about their training needs, the types of training they have done in the past, how successful the programs have been, etc. as well as the challenges they are currently facing in the workplace. Periodically, AMA hosts round table discussions with members and customers specifically to determine what their training needs are and how AMA can help them meet those needs.

Organization's investment in R&D as a percentage of leadership sales revenue: 0 - 5%

Three aspects of a leadership program that are most important to its success and effectiveness:
1. Provide leaders and their organizations with the knowledge, skills and tools they need to improve business performance, adapt to a changing workplace and prosper in a complex and competitive business world.
2. AMA programs serve as a forum where leaders can exchange the latest information, ideas and insights on best practices and workplace and business trends.
3. AMA seminars and other programs are led by senior executives, managers, authors, educators, consultants and other subject matter experts. They are not only skilled platform speakers, but also top business practitioners who have been in the trenches - and who bring their distinct insights and practical, real-world experience to every program.

LEADERSHIP TRAINING DELIVERY METHODS:
- Classroom training is offered.
- There are currently 18 public, open-enrollment programs.

Client-sponsored programs: AMA can customize any AMA open-enrollment seminar and can create distinct custom-designed programs to meet the individual training needs of the customer.
Classroom training represented 75-100% of their leadership revenue in the last fiscal year. E-Learning programs are not offered. Stand-alone leadership training products are offered. AMA’s book publishing division, AMACOM, publishes a full line of leadership books and self-study programs. AMA also has a website dedicated to its members which includes articles and other editorial material on leadership and leadership development. Stand-alone training products represented 0-24% of their leadership revenue in the last fiscal year. Blended learning leadership programs/curricula are not offered.

Additional information: American Management Association is the world’s leading membership-based management development organization. Since 1923, it has provided valuable and practical action-oriented learning programs to business professionals at every stage of their careers. More than 500,000 AMA customers and members a year learn new skills and behaviors, gain more confidence, advance their careers and contribute to the success of their organizations through a wide range of AMA seminars, conferences and executive forums, as well as through AMA books and publications, research, online learning and self-study courses.

STANDARD RESPONSES FOR CLASSROOM TRAINING SOLUTIONS

Customization: All AMA content offered in its seminars can be customized to meet the unique training needs of each client. All non-AMA content used with permission in AMA public seminars may require prior approval before being used in a customized program. AMA routinely offers pre- and post-assessments for customized AMA courses at the request of the customer. Prices vary depending on the number of participants and the customer requirements.

Delivery options: Trainers/consultants deliver the program and co-facilitation with client trainers is available. Train-the-trainer programs and program licensing are not available.

Duration and format of client-sponsored program: The format is the same as the public program, but can be tailored to meet the individual training needs of the client.

Pre-work: AMA works with clients to create unique pre-work packages as deemed appropriate to meet course and client business objectives. Post-work: AMA works with clients to create unique post-work packages as deemed appropriate to meet course and client business objectives.

Standard materials provided with program: AMA provides a turnkey solution that includes course workbooks, supplemental reading materials, a qualified, professional trainer, videos, instruments or other learning tools, all ancillary supplies required, evaluation sheet and summary results.

Optional materials available and associated costs: AMA works through a wide network of professionals and suppliers to ensure access to the most up-to-date techniques, tools and products. They can accommodate most client requests. Pricing is dependant upon client requirements. AMA makes every effort to respect the investment wishes of its clients and strives to create the most cost effective solution given customer requirements.

Reinforcement/Follow-up options and associated costs: AMA has created follow-up activities for a wide range of clients across many industries. Some options are live action plans coupled with debrief sessions, 360 degree participant feedback, pre- and post-tests, participant shadowing or follow up coaching. We can accommodate most client requests. Pricing is dependant upon client requirements. AMA makes every effort
to respect the investment wishes of its clients and strives to create the most cost effective solution given customer requirements.

AMA includes a standard evaluation form as part of the comprehensive learning package offered to their clients. Summary results are provided for each training session.

**Languages in which this public program is currently offered:** U.S. English  
**Countries in which this public program is currently offered:** United States, Canada  
**Languages in which the client-sponsored program is currently offered:** U.S. English, U.K. English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese

AMA is a global non-profit management training and professional development organization. It is based in New York City with divisions, affiliations and licensing arrangements in North America, Europe, the Middle East and Asia. Programs can be offered in many languages all around the world to meet the training needs of individual clients.

### PROGRAM INFORMATION

**5-Day "MBA" Workshop**

**Modality:** Classroom training  
**The single most important skill/competency area addressed in this program is:**  
- Business acumen - across key business disciplines, including finance, accounting, strategy, marketing and management

**The secondary skills/competency areas addressed in this program are:**  
- Other: Developing sustainable competitive strategy  
- Other: Applying marketing tools  
- Other: Understanding Leadership Styles

**Course description:** This accelerated, five-day presentation surveys the core curriculum covered in most university level graduate business programs. The knowledge you’ll acquire in this interactive learning experience will provide you with a strong overall business foundation. You’ll discover how various components of a business must be linked, aligned and integrated into a successful business system. And you’ll gain a firm grasp of modern management practices. While this seminar is no substitute for a two-year MBA degree, it will equip you with the ability to identify the most effective business tools and strategies to help you and your company keep and hone your competitive edge. This program has been in existence since 2001.

**Participant profile:** The primary audience includes Mid-level managers and Supervisors and/or front-line managers. The secondary audience includes Senior VPs, C-level executives Directors, VPs.

**Most common industries represented by clients purchasing this offering:**  
- Financial Services & Insurance  
- Technology & Communications  
- Healthcare  
- Process & Manufacturing  
- Professional Services  
- Government  
- Other (please describe)  
- Pharmaceutical

**Public Program:** Yes; **Pre-requisites:** None; **Duration:** 5 days
Format of public program:
- Trainer/Consultant Presentation 50%
- Discussion 20%
- Group Activities/Role Plays 20%
- Case Studies 10%

Pre-work:/Post-work:  No

Standard materials provided with program:  Workbook and business related handouts, i.e., annual reports

Reinforcement/Follow-up options and associated costs:  Recommended reading list of book published that reinforce information covered in the open-enrollment seminar.

Languages in which this public program is currently offered:  U.S. English and Spanish

Countries in which this public program is currently offered:  USA and Mexico

Total number of participants in the public, open enrollment version of this program last fiscal year:  600, 95% of participants reside in the U.S.

Top competitive offerings:
1. Essentials of Management Wharton University of Pennsylvania Executive Education
2. Fundamentals of Management: Highlights of an MBA; Columbia Business School Executive Education

Client-Sponsored Program:  Yes

Delivery options provided:  Your trainers/consultants deliver program; Co-facilitation with client trainers; Train-the-trainer programs and program licensing.

Duration:  This course is designed as a five-day seminar. However, it can be tailored to meet the individual training needs of the customer.

AMA’s Advanced Executive Leadership Program

Modality:  Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

Secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management

Course description:  An intensive three-day exploration into your role as a leader, visionary, and strategic thinker. You’ll understand what makes a leader, the practices and commitments of effective leadership, how to shape organizational excellence, which global competencies are critical to success today and how to gain personal mastery of your own leadership. This program has been in existence since May 2004.

Participant profile:  The primary audience includes Directors, VPs and High potential leaders. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and Supervisors and/or front-line managers.
The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A three-day public program is available. There are no pre-requisites for the public program.

The program design includes the following components:

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%
- Simulation 20%

Pre-work/Post-work: There is no pre-work or post-work required.

Languages in which this public program is currently offered: U.S. English; in United States only.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 100; 95% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:

1. Leading Change and Innovation, University of Chicago Graduate School of Business
2. Leadership and High Performance Teams, Center for Creative Leadership
3. High-Impact Leadership: Maximizing Individual and Organizational Performance, Columbia Business School Executive Education

Client-Sponsored Program: A client-sponsored program is available; there are no pre-requisites for the program.

Coaching: A Strategic Tool for Effective Leadership

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

Coaching Skills

The secondary skills/competency areas addressed in this program are:

- Communication Skills
- Building Positive Relationships with Others
- Increasing Performance of Others/Performance Management

Course description: Use coaching to improve the effectiveness of individuals and teams! This seminar gives you a variety of coaching tools, techniques and best practices from analyzing the cause of sub-par performance to creating a climate for effective coaching and learning from giving corrective feedback to handling difficult responses to coaching. You’ll leave this three-day seminar more aware of your personal habits, styles and preferences in coaching situations through assessment instruments, role-plays and exercises. And you’ll be better able to understand and handle the human dynamics between the coach and the coached. This program been in existence for 6 years. The date of last significant update/revision (defined as >=30% content revision) is 4/1/1999.

Participant profile: The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, High potential leaders, Mid-level managers, Supervisors and/or front-line managers.
Most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: Yes; Pre-requisites: None; Duration: 3 days

Format of public program:

- Trainer/Consultant Presentation 40%
- Discussion 10%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%

Pre-work/Post-work: None

Standard materials provided with program: Course notebook, self assessment instrument, supplemental recommended reading.

Standard way to measure program effectiveness and individual behavior change: Daily and final evaluation forms; application exercises and feedback

Languages in which this public program is currently offered: US English and Japanese.

Countries in which this public program is currently offered: US, Canada, Japan.

Top 3 competitive offerings by program name and vendor:

1. Coaching for Development; Center for Creative Leadership
2. Coaching Others for Top Performance; Achieve Global
3. Wharton Executive Coaching Workshop: Building Partnerships to Drive Performance; Wharton University of Pennsylvania Executive Education

Client-Sponsored Program: Yes

AMA’s Course for Presidents and CEOs

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making.

Secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Thinking Globally

Course description: The role of the President - Never has it been more and less important. It is more important because of the uncertainty in the environment and the clear indications that the future will not be easily predicted from the past. It is less important because of the increasing evidence that every individual in the organization has to make a significant contribution in order for the firm to be successful. This
program has been in existence for more than 15 years. The date of last significant update/revision (defined as >=30% content revision) is 01/01/2004.

**Formal third party recognition and/or awards:** AMA's Course for Presidents and CEOs has been featured in Entrepreneur, Chief Executive, Red Herring magazines, among others.

**Participant profile:** The audience includes Senior VPs and C-level executives.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services

**Public Program:** A five-day public program is available. There are no pre-requisites for the program.

**The program design includes the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 30%
- Group Activities/Role Plays 30%

**Pre-work:** There is an optional pre-course assessment that attendees can choose to take online. Results are given to them at the seminar and after a group debrief about the assessment, attendees get a one-on-one debrief with one of the course leaders about their individual results. **Post-work:** Attendees have access to a members-only website called CEO Circle for updated information, related articles and moderated chat discussions.

**Standard materials provided with program:** Notebook, handouts, including "Harvard Business Review" articles and other cases.

**Optional materials available and associated costs:** Recommended reading lists

**Top competitive offerings by program name and vendor:**
1. Leadership at the Peak, Center for Creative Leadership
2. Owner/President Management (OPM) Program, Harvard Executive Development

**Client-Sponsored Program:** A client-sponsored program is available.

**Pre-assessments:** AMA routinely offers pre- and post-assessments for customized AMA courses at the request of the customer. Prices vary depending on the number of participants and the customer requirements.

**Maximum number of participants:** To maximize learning, AMA recommends no more than 20 participants in a classroom setting. The structure of some courses may require a smaller number of participants. However, AMA can design courses that can accommodate larger numbers upon request.

**Number of trainers/consultants required:** AMA recommends 1 trainer per 20 learners. The structure of some courses may require a smaller participant/trainer ratio. However, AMA can design courseware that can accommodate a greater participant/trainer ratio upon request.
Developing and Executing a Customer-Centric Strategy

Modality: Classroom training

The most important skills/competency areas addressed in this program: are
- Problem Analysis/Problem Solving + Strategic Thinking/Decision Making
- Other: Customer-centricity and business strategy

The secondary skills/competency areas addressed in this program are:
- High Performing Teams
- Leading/Sponsoring Change Efforts
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

Course description: This course drives home the point that successful companies understand that their organizational strategy must be built around the client's needs. It teaches how to develop a corporate plan that enhances the total customer experience and ensures future success. This program has been in existence less than one year.

Participant profile: The audience includes Senior VPs, C-level executives Directors, and VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Other: Nonprofit organizations

Public Program: Yes; Pre-requisites: No; Duration: 2 days

Format of public program:
- Trainer/Consultant Presentation 20%
- Discussion 25%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 25%
- Case Studies 25%

Pre-work/Post-work: None

Standard materials provided with program: Workbook and related handouts

Reinforcement/Follow-up options and associated costs: Recommended reading list

Total number of participants in the public, open enrollment version of this program last fiscal year: 100, all participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Creating the Market-Focused Organization; Kellogg School of Management
2. Achieving Breakthrough Value; Harvard Business School Executive Education Program
3. Managing Customer Value; Duke University

Client-Sponsored Program: Yes

Delivery options: Your trainers/consultants deliver program; Co-facilitation with client trainers; Train-the-trainer programs and program licensing

Duration: This course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer.
Developing Executive Leadership

*Modality:* Classroom Training

**The single most important skill/competency area addressed in this program:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program:**
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Communication Skills

**Course description:** Discover how to deepen your self-awareness, empower your staff to improve performance, and integrate your organizational vision into your daily work life. In order to optimize your company’s performance as well as your own career as an executive, you must be a visionary, a trailblazer, a strategist, a communicator, a coach, a diplomat and a politician. The world’s most successful leaders are able to focus on the big picture and uphold high standards while wearing many hats - because they have learned how to lead with the head, feet, heart and hands. In this intensive three-day program, proven-in-action techniques combine with peer interaction and insights from the latest research to help you master the competencies of effective leadership. Here is your opportunity to pinpoint and tackle your most crucial challenges, to redefine your role, refine your style, build emotional intelligence for improved communication and self-management, and develop practical strategies to inspire your workforce to increased productivity. This program has been in existence for 20 + years. The date of the last significant update/revision (defined as >=30% content revision) is 02/23/2004.

**Participant profile:** The primary audience includes Directors and VPs. The secondary audience includes Senior VPs, C-level executives, High potential leaders, Mid-level managers, Supervisors and/or front-line managers.

**The most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** Yes; **Pre-requisites:** None; **Duration:** 3 days

**Format of public program:**
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%

**Pre-work/*Post-work:** None

**Standard Materials Provided With Program:** Course notebook; self-assessment instruments, handouts, articles, supplemental recommended readings

**Reinforcement/Follow-up options and associated costs:** Action/development plan

**Standard Way To Measure Program Effectiveness And Individual Behavior Change:** Daily and final evaluation forms; application exercises and feedback

**Languages in which this public program is currently offered:** US English; Spanish; Japanese
Countries in which this public program is currently offered: USA, Canada, Japan, Mexico
Total number of participants in the public, open enrollment version of this program last fiscal year: 750; 95% percent of these participants reside in the U.S.
Top 3 Competitive Offerings:
1. High Impact Leadership: Maximizing Individual and Organizational Performance; Columbia Business School Executive Education
2. The 4 Roles of Leadership; Franklin Covey
3. Leading and Managing People; Wharton University of Pennsylvania Executive Education
Client-Sponsored Program: Yes
Delivery Options Provided: Your trainers/consultants deliver program; Co-facilitation with client trainers; Train-the-trainer programs and program licensing
Pre-requisites: None; Duration: This course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer.

Developing Leaders at All Levels: Fostering Initiative and Accountability
Modality: Classroom training
The single most important skill/competency area addressed in this program is:
- Talent Management (Recruiting/Retaining/Developing Others)
The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Increasing Performance of Others/Performance Management
Course description: Spur your team to greater corporate success! In today's uncertain business environment, every member of the organization must assume the qualities of leadership: the ability to adapt to change, take charge when necessary and accept responsibility for one’s actions and decisions. This seminar will prepare you to develop your employees to demonstrate greater initiative and accountability, while striving for continuous improvement. This program has been in existence for 1+ year. The date of the last significant update/revision: (defined as >=30% content revision) is 08/01/2003.
Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs, and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.
The most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
Public Program: A public program is available. Pre-requisites: None
Duration of public program: 2 days
Format of public program:
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%
Section III – Program Files
AMA

Pre-work/Post-work: None
Standard materials provided with program: Course notebook, self-assessment instrument, supplemental recommended reading
Reinforcement/Follow-up options and associated costs: Action/development plan

Standard Way To Measure Program Effectiveness And Individual Behavior Change:
Daily and final evaluation forms; application exercises and feedback.

Total number of participants in the public, open enrollment version of this program last fiscal year: 100; 95% Percent of these participants reside that in the U.S.

Client Sponsored Program:
A client-sponsored program is available.

Pre-assessments:
AMA routinely offers pre- and post-assessments for customized AMA courses at the request of the customer. Prices vary depending on the number of participants and the customer requirements.

Other delivery costs to be paid by the client:
Travel; Hotel; Food & Beverage

Pre-requisites for client-sponsored program: None

Duration of client-sponsored program:
This course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer. The format for this client-sponsored program is the same as the open-enrollment program, but can be tailored to meet the individual training needs of the client.

Executive Effectiveness Course

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management

Course description:
At this course, you'll get a clear, honest look at opportunities to adjust and fine-tune your managerial style to adapt to this new business environment. You'll examine your core values, better understand yourself and others and learn how to build trust all in a non-threatening atmosphere. This intensive program is structured to help you see yourself as others see you, enhance others perception of you, match your personal goals with your organization's mission and master the skills that will maximize your contribution to your company's bottom line. This program has been in existence for 30+ years. The date of last significant update/revision (defined as >=30% content revision) is 10/23/2000.

Participant profile:
The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Professional Services
- Government
- Utilities

Public Program: Yes; Pre-requisites: Yes - Participants must attend Unit 1 prior to attending Unit 2.
Duration: Unit 1 is 4.5 days, and Unit 2 is 4.5 days
Format of public program:
- Trainer/Consultant Presentation 15%
- Discussion 35%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%

Pre-work: No; Post-work: Yes - There are feedback sessions that participants are required to complete with people back on their job prior to attending Unit 2 of the program.

Standard materials provided with program: Participant Notebook, Learning Journal and Feedback Journal

Reinforcement/Follow-up options and associated costs: After Unit One is completed, the participants form feedback groups with one another and have periodic conference calls to discuss their progress, or any challenges that they may be facing. The group provided feedback and assistance to the participant sharing his/her experience.

Standard way to measure program effectiveness and individual behavior change: The course evaluation which is completed at the end of units 1 and 2. Also, Unit 2 gives the participants opportunity to express how they were able to implement the actions taught in Unit 1.

Total number of participants in the public, open enrollment version of this program last fiscal year: 100, 95% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
- Leadership Development Program; Center for Creative Leadership
- Advanced Management Program; Wharton University of Pennsylvania
- High Potentials Leadership Program; Harvard Business School Executive Education

Client-Sponsored Program: Yes
Different client leadership models and/or other client-specific needs are not accommodated.

Delivery options you provide: Your trainers/consultants deliver program; Train-the-trainer programs and program licensing

Pre-requisites: No; Duration: Depends on the client request and customization

Format of client-sponsored program:
- Trainer/Consultant Presentation 15%
- Discussion 35%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%

Pre-work: No; Post-work: Yes - Participants complete a feedback journal and participate in feedback groups between attending Unit 1 and Unit 2.

Leadership and Team Development for Managerial Success

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:

- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:

- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams

**Course description:** Inspire and influence your people to achieve your goals as a team! Managers who will be promoted are the ones who not only manage efficiently but also lead their teams effectively. Learn how to work in a horizontal mode of operation, apply a consistent theory in leading your team, and teach critical leadership skills to members of your team, so each and every one of them can lead the team in your absence. The program has been in existence for 20 years. The date of last significant update/revision (defined as >=30% content revision) is 08/15/1997.

**Participant profile:**

The primary audience includes Mid-level managers and High potential leaders. The secondary audience includes Senior VPs, C-level executives, Directors, VPs, Supervisors and/or front-line managers.

**Most common industries represented by clients purchasing this offering:**

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** Yes; **Pre-requisites:** No; **Duration:** 2 days

**Format of public program:**

- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%

**Pre-work:/Post-work:** No

**Total number of participants in the public, open enrollment version of this program last fiscal year:** 250; 95% Percent of these participants reside in the U.S.

**Top competitive offerings:**

1. Leadership and High-Performance Teams; Center for Creative Leadership
2. Leading for Growth; Performance Learning Systems

**Client-Sponsored Program:** Yes; **Pre-requisites:** No;

**Duration:** This course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer.
Leadership Skills and Team Development for IT & Technical Professionals

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

• Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:

• Problem Analysis/Problem Solving
• Coaching Skills
• High Performing Teams
• Conflict Resolution

Course description: Each year, hundreds of technical pros gain the interpersonal and "people" skills they need to master the art of leadership at this powerful seminar! Team leaders of technical professionals face a substantial challenge: you need to achieve successful task completion through positive work relationships. In this highly interactive seminar, you will learn how to build and lead a team--evaluate your team's performance--and develop an action plan for continued leadership success. The program has been in existence for 10 years. The date of last significant update/revision (defined as >=30% content revision) is 10/15/2003.

Participant profile: The audience includes all levels of management equally.

Most common industries represented by clients purchasing this offering:

• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Utilities

Public Program: Yes; Pre-requisites: None; Duration: 3 days

Format of public program:

• Trainer/Consultant Presentation 40%
• Discussion 20%
• Exercises/Quizzes 10%
• Group Activities/Role Plays 20%
• Case Studies 10%

Pre-work/Post-work: None

Total number of participants in the public, open enrollment version of this program last fiscal year: 200; 95% Percent of these participants reside in the U.S.

Top competitive offerings:
1. Leading Virtual and Remote Teams; Learning Tree International

Client-Sponsored Program: Yes; Pre-requisites: None

Duration: This course is designed as a three-day seminar. However, it can be tailored to meet the individual training needs of the customer.
Leading Virtual and Remote Teams

**Modality:** Classroom Training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Creativity and Innovation
- Increasing Performance of Others/Performance Management

**Course description:** Master new competencies to meet the challenge of leading a virtual team. You need to build a team identity and process, balance technical and social systems within your team, and facilitate the development of long-distance relationships and trust among your team members. Communication takes on a whole new meaning when you're not face-to-face with your direct reports and team members. You need to understand the channels of communication open to you as a virtual team leader, and then choose the right channel for the tasks at hand. This program has been in existence 4 years. The date of last significant update/revision (defined as >=30% content revision) is 03/01/2003.

**Participant profile:** The audience includes all management levels equally.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** Yes; **Pre-requisites for public program:** None

**Duration of public program:** 3 days

**Format of public program:**
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%

**Pre-work:/Post-work:** None

**Standard materials provided with program:** Course notebook, article, supplemental recommended reading, self-assessment instrument

**Reinforcement/Follow-up Option:** action/development plan - included

**Standard Way To Measure Program Effectiveness And Individual Behavior Change:** Daily and final evaluation forms; application exercises and feedback

**Languages in which this public program is currently offered:** U.S. English

**Countries in which this public program is currently offered:** U.S.

**Total number of participants in the public, open enrollment version of this program last fiscal year:** 100; **Percent of these participants that reside in the U.S.:** 95%
Top Competitive Offerings:
1. Leading Virtual and Remote Teams; Learning Tree International
2. Leading Across Boundaries; Linkage Incorporated

Client-Sponsored Program: Yes
Complete Custom Design: Yes, All AMA content offered in its seminars can be customized to meet the unique training needs of each client.
Limited Customization: Yes, all non-AMA content used with permission in AMA public seminars may require prior approval before being used in a customized program.

Pre-assessments: Yes. AMA routinely offers pre- and post-assessments for customized AMA courses at the request of the customer. Prices vary depending on the number of participants and the customer requirements.

Delivery options you provide:
1. AMA trainers/consultants deliver program
2. Co-facilitation with client trainers

Other delivery costs to be paid by the client: Travel; Hotel; Food & Beverage

Pre-requisites: None; Duration: This course is designed as a three-day seminar. However, it can be tailored to meet the individual training needs of the customer.

Format: The format for this client-sponsored program is the same as the open-enrollment program, but can be tailored to meet the individual training needs of the client.

Pre-work: Yes, AMA works with clients to create unique pre-work packages as deemed appropriate to meet course and client business objectives; Post-work: Yes, AMA works with clients to create unique post-work packages as deemed appropriate to meet course and client business objectives.

Standard Materials Provided With Program: AMA provides turnkey solutions that include course workbooks, supplemental reading materials, a qualified, professional trainer, videos, instruments or other learning tools, all ancillary supplies required, evaluation sheet and summary results.

Reinforcement/Follow-up options: AMA has created follow-up activities for a wide range of clients across many industries. Some options are live action plans coupled with debrief sessions, 360 degree participant feedback, pre- and post-tests, participant shadowing or follow up coaching. We can accommodate most client requests. Pricing is dependant upon client requirements. AMA makes every effort to respect the investment wishes of its clients and strives to create the most cost effective solution given customer requirements.

Languages in which the client-sponsored program is currently offered: US English, UK English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese; Other - AMA is a global organization based in New York City with divisions, affiliations and licensing arrangements in North America, Europe, the Middle East and Asia. Programs can be offered in many languages all around the world to meet the training needs of individual clients.

Countries in which this client-sponsored program is currently offered: AMA is a global organization based in New York City with divisions, affiliations and licensing arrangements in North America, Europe, the Middle East and Asia. Programs can be offered in many locations around the world to meet the training needs of individual clients.
AMA’s Leading with Emotional Intelligence

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
• Assessing/Developing Your Personal Leadership Skills/Style.

The secondary skills/competency areas addressed in this program are:
• Motivating/Inspiring/Engaging Others
• High Performing Teams
• Conflict Resolution
• Communication Skills
• Building Positive Relationships with Others
• Appreciating Diversity
• Assessing/Developing Emotional Intelligence

Course description: Gain the ability to recognize and positively manage emotions in yourself, in others and in groups. Recent studies indicate that emotional intelligence is a powerful key to effective leadership. This valuable seminar delivers the in-depth knowledge and practical skills you need to ensure that you are a strong, emotionally intelligent leader. You will learn how to apply emotional intelligence to specific leadership situations to gain the authority and success you strive for as a leader. You will also keep current on cutting-edge developments in leadership theory and practice, to help you better collaborate and manage conflict. This program has been in existence for two years.

Participant profile: The primary audience includes Directors, VPs and High potential leaders. The secondary audience includes Senior VPs, C-level executives and Mid-level managers.

Most common industries represented by clients purchasing this offering:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Utilities
• Other - Pharmaceuticals

Public Program: A three-day public program is available. There are no pre-requisites for the program.

The program design includes the following components:
• Trainer/Consultant Presentation 30%
• Discussion 20%
• Exercises/Quizzes 15%
• Group Activities/Role Plays 20%
• Case Studies 15%

Pre-work/Post-work: There is no pre-work or post-work required.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 250; 95% of these participants reside in the U.S.

Top competitive offering:
• Leading Creatively: Navigating Complex Challenges, Center for Creative Leadership

Client-Sponsored Program: A client-sponsored program is available. There are no pre-requisites for the program.
Preparing for Leadership: What It Takes to Take the Lead

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
  • Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
  • Motivating/Inspiring/Engaging Others
  • Building Positive Relationships with Others
  • Building Partnerships and Alliances

Course description: You want to become a leader, but are you ready to take that step? Learn how to get noticed and selected for a leadership position and develop the skills every confident leader needs! This course is uniquely designed to help leaders-to-be get ready for their new challenges and responsibilities. You’ll discover the heart, soul and mind of true leadership. You'll learn what people expect from and respect in leaders. You'll explore leadership roles as strategist, change agent, coach, manager, communicator, mentor, and team member. And you'll learn how to develop your unique leadership style for maximum impact. This program has been in existence for 9 years. The date of last significant update/revision (defined as >=30% content revision) is 10/20/2003

Participant profile: The primary audience for this program includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers, High potential leaders and Supervisors and/or front-line managers.

The most common industries represented by clients purchasing this offering are:
  • Financial Services & Insurance
  • Technology & Communications
  • Healthcare
  • Process & Manufacturing
  • Retail, Hospitality
  • Professional Services
  • Government
  • Utilities

Public Program: Yes; Pre-requisites: No; Duration: 2 days

Format of public program:
  • Trainer/Consultant Presentation 40%
  • Discussion 20%
  • Exercises/Quizzes 10%
  • Group Activities/Role Plays 20%
  • Case Studies 10%

Pre-work:/Post-work: No

Total number of participants in the public, open enrollment version of this program last fiscal year: 550, 95% reside in the U.S.

Top 3 competitive offerings by program name and vendor:
  1. The Leadership Journey: Creating and Developing Your Leadership; Wharton University of Pennsylvania Executive Education
  2. Leading as a Manager; Linkage Incorporated
  3. The 4 Roles of Leadership; Franklin Covey

Client-Sponsored Program: Yes; Pre-requisites: No

Duration: this course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer.
Strategic Planning

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Problem Analysis/Problem Solving + Strategic Thinking/Decision Making

**The secondary skills/competency areas addressed in this program:**
- Setting and Achieving Goals
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Business Acumen
- Thinking Globally
- Other: Competitive Strategy
- Other: Appreciative Inquiry

**Course description:** This course is designed to mesh proven practices with new insights and ideas from a wide range of current strategic thinking. Managers learn by doing and gain a wider perspective of management through breakout sessions, practice exercises and case applications. Bring your strategic dilemmas to this program and get direction on up-to-date analytical and organizational approaches to solutions. This program has been in existence for 10+ years. The Date of last significant update/revision (defined as >=30% content revision) is 03/01/2005.

**Participant Profile:** The primary audience includes Senior VPs, C-level executives and Directors, VPs. The secondary audience includes High potential leaders and Mid-level managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality

**Public Program:** Yes; **Pre-requisites:** No; **Duration:** 3 days

**Format of public program:**
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 15%
- Case Studies 15%

**Pre-work:/Post-work:** No

**Standard materials provided with program:** Workbook, handouts, case studies, Harvard Business Review articles

**Reinforcement/Follow-up options and associated costs:** Recommended reading lists

**Languages in which this public program is currently offered:** US English and Japanese

**Countries in which this public program is currently offered:** USA, Japan

**Total number of participants in the public, open enrollment version of this program last fiscal year:** 600, 95% of participants reside in the U.S.
Top 3 competitive offerings:
1. Simplified Strategic Planning for Small to Mid Size Companies; Michigan State University
2. Creating Breakthrough Strategy; Columbia Business School Executive Education
3. Implementing Strategy; Wharton University of Pennsylvania Executive Education

Client-Sponsored Program: Yes
Delivery options provided: Your trainers/consultants deliver program; Co-facilitation with client trainers; Train-the-trainer programs and program licensing
Can accommodate a greater participant/trainer ratio upon request.
Duration of client-sponsored program: This course is designed as a three-day seminar. However, it can be tailored to meet the individual training needs of the customer.

Strategic Planning Tools: Analytical Applications and Concepts to Enhance Your Plan

Modality: Classroom Training

The single most important skill/competency area addressed in this program:
- Problem Solving/Analysis + Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program:
- Thinking Globally
- Other: Strategic Environmental Assessment
- Other: Strategy Patterns
- Other: Anticipating Change

Course description: This seminar introduces additional depth of knowledge and specific "how to's" to the individual who is charged with leading, facilitating or participating in strategy formation. This program has been in existence for 10 years. The date of last significant update/revision (defined as >=30% content revision) is 11/1/2004.

Participant profile: The primary audience includes Directors, VPs. The secondary audience includes High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Other: Pharmaceuticals
- Other: Nonprofit

Public Program: Yes; Pre-requisites: No; Duration: 2 days

Format of public program:
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Group Activities/Role Plays 25%
- Case Studies 25%

Pre-work: Yes, Case studies and Harvard Business Review articles; Post-work: No

Standard materials provided with program: Workbook, handouts, case studies, Harvard Business Review articles

Reinforcement/Followup options and associated costs: Recommended reading list
Total number of participants in the public, open enrollment version of this program last fiscal year: 50, all of these participants reside in the U.S.

Top competitive offerings by program name and vendor:
1. Executing Breakthrough Strategy; Columbia Business School Executive Education
2. Implementing Strategy; Wharton University of Pennsylvania Executive Education

Client-Sponsored Program: Yes

Delivery options: Your trainers/consultants deliver program; Co-facilitation with client trainers; Train-the-trainer programs and program licensing

Duration of client-sponsored program: This course is designed as a two-day seminar. However, it can be tailored to meet the individual training needs of the customer.

The Voice of Leadership: How Leaders Inspire, Influence and Achieve Results

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
• Communication Skills.

The secondary skills/competency areas addressed in this program are:
• Assessing/Developing Your Personal Leadership Skills/Style
• Motivating/Inspiring/Engaging Others
• Coaching Skills
• Conflict Resolution
• Building Positive Relationships with Others

Course description: It's a fact of organizational life: To lead well, you must communicate well. No question about it. This fast-paced, results-oriented seminar is uniquely designed to strengthen your leadership communication skills. You'll learn practical techniques to shape your leadership messages, hone an authentic leadership voice, and engage in powerful conversations that achieve results. This program has been in existence for three years.

Participant profile: The primary audience includes Directors, VPs and High potential leaders. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and Supervisors and/or front-line managers.

The most common industries represented by clients purchasing this offering are:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Utilities
• Pharmaceuticals

Public Program: A three-day public program is available. There are no prerequisites for the program.

The program design includes the following components:
• Trainer/Consultant Presentation 30%
• Discussion 20%
• Exercises/Quizzes 20%
• Group Activities/Role Plays 20%
• Case Studies 10%
Pre-work/Post-work: There is no pre-work or post-work required.

Countries in which this public program is currently offered: U.S. and Canada.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 500; 95% reside in the U.S.

Top competitive offerings by program name and vendor:
1. Powerful conversations for Building Commitment, Linkage Inc.

Client-Sponsored Program: A client-sponsored program is available. There are no prerequisites for the program.

**AMACOM - Leadership Training Activity Book: 50 Exercises for Building Effective Leaders**

*Modality:* Training product

The single most important skill/competency area addressed in this product is:

The secondary skills/competency areas addressed in this product are:
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts

*Description:* The Leadership Training Activity Book is a collection of engaging, sure-fire exercises based on the best, most up-to-date learning theory for preparing the leaders of tomorrow. The book features easily adaptable modules designed for beginning to advanced skill levels, short or long sessions, and large or small groups. You'll find the perfect training exercises to help new and experienced leaders improve their understanding of crucial topics such as: trust, values, networking, conflict resolution, diversity, negotiation, listening skills, mentoring, vision, communication, and more. The Leadership Training Activity Book provides trainers with a wide range of activities to help teach and apply the most critical leadership competencies participants need, enabling you to develop and liberate the leadership qualities learners already have within themselves. It is a unique collection of proven exercises that will elicit the best from those who wish to lead. This product was published in October 2004.

*User profile:* The primary audience includes High potential leaders, Mid-level managers and Supervisors/Front-line Managers.

Length of each module: 5 pages

Pre-work/Post-work: There is no pre-work or post-work required.

Instructional techniques: 100% of exercises

Additional information: Written by: Lois B. Hart, Ed.D., the founder and Executive Director of the Women’s Leadership Institute. The author of many books and tapes, she has over 30 years of experience as a trainer and was named the Colorado Woman Leader of Excellence. She lives in Denver, Colorado. Charlotte S. Waisman, Ph.D. is a specialist in communication and interpersonal skills, and is Director of Human Resources at Ischemia Technologies. She lives in Evergreen, Colorado.
Balance Learning, LLC
215 Salem St.,
Salem, MA 01801
888-935-1002
http://www.balancelearning.com

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FINANCIAL PROFILE
Ownership/Funding: Privately-held

ORGANIZATION TENURE
Years in business/Years as a leadership-training vendor: 0-4 years

COMPANY PROFILE
Leadership Development Philosophy: Leadership is vital to making work teams interact successfully and grow. When technology changes jobs overnight, business is conducted around the clock, competition is global and people are subject to downsizing and restructuring, it takes leadership to harness the power of the team.

The module looks at what team leadership entails and the skills, qualities and behaviors needed to lead a team successfully. A variant of Adair's model is introduced to help participants understand their overarching responsibilities as a team leader for the team, the task and individual. Fifteen leadership skills and qualities are mapped into each of these areas. Students see how people view a leader who is strong and weak in each skill or quality. A 'Bridging the Gap' page helps participants to see what they can do to improve their skills and behaviors. Participants are given the opportunity to identify the skills in action and decide 'what to do next.'

The module focuses on understanding how teams interact, what good teamwork is and how to set up a team and develop it to be fully functional.

LEADERSHIP TRAINING DELIVERY METHODS
• Offers classroom training as part of the blended offering
• Offers 1 e-Learning program
• Offers 1 Blended Learning leadership program/curricula
• Does not offer stand-alone leadership training products

PROGRAM INFORMATION
Leadership and Teamwork
Modality: Blended learning
The single most important skill/competency area addressed in this program is:
• High Performing Teams.

Overall description of curriculum: This course introduces participants to a facilitative style of management effective in today's working environment. It helps them assess their leadership qualities, strengths and weaknesses, and understand how teams work, interact and grow so they can manage their team from co-existence to collaboration, from inception to high performance. This blended curriculum has been in existence since 2004.
Formal third party recognition and/or awards: This program received an award from New England College of Finance.

Participant profile: The primary audience includes High potential leaders, Mid-level managers, Supervisors and/or front-line managers. The secondary audience includes Senior VPs/C-level executives and Directors/VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM

Component 1 - Knowledge Dimension

Modality: e-Learning

Description: Ensures that participants understand the underpinning knowledge for the course so they can fully participate in the skills development classroom event. Includes pre-assessment, self-paced course and post-test.

Duration: Approximately 2 hours

Component 2 - Skills Dimension

Modality: Classroom training

Description: Ensures that participants have the opportunity to practice new skills, ask questions, and relate general knowledge to their specific situation, supported by a trainer and a group of peers. Includes a variety of exercises such as group discussions, role plays, case study and action planning.

Duration: 1 day

Component 3 - Action Dimension

Modality: Classroom training

Description: Ensures that participants have a supported platform and system from which to apply new skills and knowledge in the workplace, supported by their trainer and their manager. Includes assignments and activities designed to dovetail into participant's workday.

Duration: Timed over 60 days. Approximately 6 hours of essays and forms.

Prerequisites: No

Customization: Complete custom design is offered. Limited customization of online and classroom learning is provided for a fee.

Pre-assessments: Available for participants for no separate charge. It includes 10-20 questions, depending on learners’ responses.

Languages/Countries in which training solutions are currently offered: This blended curriculum is offered worldwide U.S. and U.K. English.

Top 3 competitive offerings by program name and vendor:
1. DDI
2. AchieveGlobal
3. SkillSoft

Standard materials provided with curriculum: Everything that's needed to deliver and manage the program is included, in addition to a turnkey learning management system (Dimension Manager). Other materials include: a trainer pack, with all class and online materials in formats for photocopying and customizing, plus PowerPoint, videos, CDs, a facilitation guide; and a participant's pack, with course overview, print version of online course modules for note taking, action activities and take-away materials.
Reinforcement/Follow-up options and associated costs: Action activities, performed and tracked after the classroom component of the program is conducted, are included in the package at no additional fee.

Assessments include: Initial survey to obtain learner objectives; a skills pre-assessment prior to taking the online course; a post-assessment upon completion of the online course; a skills assessment following completion of the classroom workshop; an evaluation of the classroom workshop; and a final survey on the entire blended program upon completion of the action activities.

Names of classroom components: 1.) Skills Dimension; 2.) Action Dimension

Delivery options: Balance Learning trainers/consultants deliver the programs. Co-facilitation with client trainers, train-the-trainer programs and program licensing are also available.

Duration of classroom training: Either 2 half-day sessions or 1 full-day session

Pre-work/Post-work: Before coming to the classroom workshop, learners complete a skills assessment, done after completing the online prerequisite. Learners complete another skills assessment upon completion of the classroom workshop, as well as a workshop evaluation.

Additional information provided: In addition to the Skills Dimension, which is the classroom component, the course includes the Action Dimension, which is the application of skills and knowledge in the workplace. Activities and job aids provide participants with opportunities to use their new skills and knowledge with the support of trainer and manager. Assignments are spaced out in time, dovetailed into normal work practices and provide written evidence that can be assessed by a trainer, of a newly developed skill.

E-Learning Component - Knowledge Dimension

Description: Ensures participants increase their knowledge and understanding of a topic so that they can reflect and gain insights into their situation at work and begin to put some of their knowledge into action and improve workplace performance. This program is asynchronous (self-paced) e-Learning.

Pre-assessments: Available for participants and included in the course.

Number of modules: 4-5

Length of each module: 30 minutes per module (on average)

Total course time: 2 hours

Pre-work/Post-work: Pre-testing is done to automatically assign a learning path tailored to participant's pre-existing knowledge. Post-testing and evaluation of knowledge gain is conducted on specific topics.

Help Desk Support: Monday - Friday, 9:00 am – 5:00 pm; Available in English

Operating systems on which this program is compatible: Windows 98, Windows 2000, Windows NT, Windows ME, Windows XP

Required Plug-ins: Flash; Minimum Bandwidth: Dial up

Browser(s) on which this program is compatible:
IE Explorer 5.x, IE Explorer 6.x, Netscape 7.x, Netscape 8.x

Compatible/Compliant: SCORM compatible; AICC compatible; Section 508 Compliant

Knowledge Dimension integrates with many LMS systems.
Performance Management

*Modality:* Blended learning

**The single most important skill/competency area addressed in this program:**
- Increasing Performance of Others/Performance Management.

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others

**Overall description of curriculum:** This course provides an introduction to an effective process of Performance Management that helps managers build teams of skilled and capable people who are focused on success. It helps managers ensure that everyone knows exactly what's expected of them. It equips managers with effective techniques for monitoring performance and helping people realize their potential. It provides a framework for positive formal reviews and shows how to successfully link rewards, recognition and performance. This blended curriculum has been in existence since 2004.

**Participant profile:** The primary audience includes Supervisors and/or Front-line managers.

**The most common industries represented by clients purchasing this offering are:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM**

**Component 1 - Knowledge Dimension**

*Modality:* Online

*Description:* Ensures that participants understand the underpinning knowledge for the course so they can fully participate in the skills development classroom event. Includes pre-assessment, self-paced course and post-test. *Duration:* Approximately 2 hours

**Component 2 - Skills Dimension**

*Modality:* Classroom

*Description:* Ensures that participants have the opportunity to practice new skills, ask questions, and relate general knowledge to their specific situation, supported by a trainer and a group of peers. Includes a variety of exercises such as group discussions, role plays, case study and action planning. *Duration:* 1 day

**Component 3 - Action Dimension**

*Modality:* Workplace

*Description:* Ensures that participants have a supported platform and system from which to apply new skills and knowledge in the workplace, supported by their trainer and their manager. Includes assignments and activities designed to dovetail into participant's workday. *Duration:* Timed over 60 days. Approximately 6 hours of essays and forms.
Prerequisites: There are no outside prerequisites for the program; however, the program does include an assessment of skills taken at the very beginning.

Customization: Complete Custom Design and Limited Customization of online and classroom learning are available for a fee.

Pre-assessments: Available for participants at no additional cost. It includes 10-20 questions, depending on learners responses.

Languages/Countries in which training solutions are currently offered: This blended curriculum is offered worldwide in U.S. and U.K. English.

Standard materials provided with curriculum: Everything that's needed to deliver and manage the program is included, in addition to a turn-key learning management system (Dimension Manager). Other materials include: a trainer pack, with all class and online materials in formats for photocopying and customizing, plus PowerPoint slides, videos, CDs, a facilitation guide; and a participant's pack, with course overview, print version of online course modules for note taking, action activities and take-away materials.

Reinforcement/Follow-up options and associated costs: Action activities, performed and tracked after the classroom component of the program is conducted, are included in the package at no additional fee.

Assessments include: Initial survey to obtain learner objectives; a skills pre-assessment prior to taking the online course; a post-assessment upon completion of the online course; a skills assessment following completion of the classroom workshop; an evaluation of the classroom workshop; and a final survey on the entire blended program upon completion of the action activities.

Name(s) of classroom component(s): 1.) Skills Dimension; 2.) Action Dimension

Pre-work/Post-work: Before coming to the classroom workshop, learners complete a skills assessment, done after completing the online prerequisite. For post-work learners complete another skills assessment upon completion of the classroom workshop, as well as a workshop evaluation.

Additional information regarding the classroom component: In addition to the Skills Dimension, which is the classroom component, the course includes the Action Dimension, which is the application of skills and knowledge in the workplace. Activities and job aids provide participants with opportunities to use their new skills and knowledge with the support of trainer and manager. Assignments are spaced out in time, dovetailed into normal work practices and provide written evidence that can be assessed by a trainer, of a newly developed skill.

E-Learning Component - Knowledge Dimension:
Description: Ensures that participants increase their knowledge and understanding of a topic so that they can reflect and gain insights into their situation at work and begin to put some of their knowledge into action and improve workplace performance. This e-Learning program is asynchronous (self-paced)

Pre-assessments: For participants are available at no additional cost
Number of modules: 4-5
Length of each module: 30 minutes (on average)
Total course time: 2 hours

Pre-work/Post-work: Pre-testing to automatically assign a learning path tailored to participant's pre-existing knowledge. Post-testing and evaluation of knowledge gain on specific topics.

Help Desk Support: Monday - Friday, 9:00 am – 5:00 pm EST; Available in English
Operating systems on which this program is compatible: Windows 98, Windows 2000, Windows NT, Windows ME, Windows XP
Required Plug-ins: Flash
Minimum Bandwidth: Dial up
Browser(s) on which this program is compatible: IE Explorer 5x, IE Explorer 6x, Netscape 7x, Netscape 8x
Compatible/Compliant: SCORM compatible, AICC compatible, Section 508 Compliant
This program integrates with many Learning Management Systems.
Section III – Program Files

Berkeley Center for Executive Development

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Berkeley, CA  94720-1900
510-642-4735
http://execdev.haas.berkeley.edu

Sales contact:
Britta Narum
510-643-8149
britta@haas.berkeley.edu

FINANCIAL PROFILE
Ownership/Funding:  Not-for-profit

EMPLOYEE PROFILE
Number of Employees:  30
Total number of employees, based in the US, delivering leadership training solutions:  30
Total number of certified contractors, based in the US, delivering leadership training solutions:  0
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:  University of California Berkeley Faculty
Total number of developers of leadership training solutions:  3

ORGANIZATION TENURE
Years in business:  20+; Years as a leadership training vendor:  20+

CLIENT PROFILE
Top 5 client companies:
1. British Telecom
2. Investment Management Consultants Association (IMCA)
3. United States Navy
4. Sybase
5. Siemens

Top 5 competitors:
1. Stanford
2. Wharton West
3. Harvard
4. University of Michigan
5. Columbia

LEADERSHIP TRAINING DELIVERY METHODS
- Learning evaluations are conducted with clients to gather data and evaluate the impact of training in their workplaces.
- Organization’s investment in R&D as a percentage of leadership sales revenue is 21%+
- Classroom training is offered and represented 75-100% of the leadership revenue last fiscal year.
- E-Learning programs are not offered.
- Stand-alone leadership training products are not offered.
- Blended learning leadership programs/curricula are offered on demand (custom programs).
- Blended Learning represented 0-24% of the leadership revenue in the last fiscal year.
PROGRAM INFORMATION

Berkeley Executive Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Thinking Globally

Course description: The Berkeley Executive Program builds the critical thinking, leadership and decision-making skills necessary to anticipate and respond to economic, technological, political and social changes in the business environment.

Participant profile: The primary audience includes Directors/VPs. The secondary audience includes Senior VPs/C-level executives, Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Government
- Utilities

Public Program: A 4 week public program is available. There are no prerequisites for the public program. Applicants must apply and be accepted into the program.

The program design includes the following components:
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Group Activities/Role Plays 10%
- Case Studies 30%
- Simulation 10%

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 50; 50% of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is not available.
Business Acumen

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Communication Skills

Course description: This program introduces participants to the strategic and market-orientation necessary to lead pro-actively and the leadership and communication skills to make it happen.

Participant profile: The primary audience includes High potential leaders. The secondary audience includes Directors/VPs and Mid-level managers.

Most common industries represented by clients purchasing this offering:
- Technology & Communications
- Healthcare
- Government

Public & Client-Sponsored Programs: A public program is not available. A client-sponsored program is available.

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is available and is industry-relevant.

Delivery options: Trainers/consultants deliver the program; there is no co-facilitation with client trainers, train-the-trainer programs or program licensing.

Pre-assessments: Not available

Prerequisites: No

Duration of client-sponsored program: Variable

The program design includes the following components:
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Group Activities/Role Plays 20%
- Case Studies 40%

Standard materials provided with program: Program binder with classroom materials and cases.

Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Languages/Countries in which training solutions are currently offered: This client-sponsored program is currently offered in English in the United States.
Section III – Program Files
Berkeley Center for Executive Development

Conflict and Negotiations

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Conflict Resolution

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Communication Skills
- Building Positive Relationships with Others

Course description: This program is designed to aid students in the development of a framework for understanding negotiations and to improve the ability of students to construct satisfying, valuable agreements in interdependent situations. A basic premise of the course is that while a manager needs analytical skills to develop optimal solutions to problems, a broad array of negotiation skills is needed in order for these solutions to be accepted and implemented.

Participant profile: The primary audience includes Directors/VPs. The secondary audience includes Senior VPs/C-level executives and Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Professional Services
- Government
- Utilities

Public Program: A public program is not available.

Client-Sponsored Program: A client-sponsored program is available.

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is available and is industry-relevant.

Pre-assessments: Not available

Delivery options: Trainers/consultants deliver the program.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 30%
- Group Activities/Role Plays 60%

Standard materials provided with program: Program binder with classroom materials and cases.

Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Standard way to measure program effectiveness and individual behavior change:
Learning evaluation

Languages/Countries in which training solutions are currently offered:
The client-sponsored program is currently offered in English in the United States.
Global Business Leadership

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Business Acumen

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Thinking Globally
- Financial analysis skills for strategic decision-making

**Course description:** This program gives a general overview of business leadership, including leading teams, creating and implementing a competitive strategy, and financial analysis for strategic decision-making.

**Participant profile:** The primary audience includes Senior VPs/C-level executives and Directors/VPs.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Government

**Public & Client-Sponsored Programs:** A public program is not available. A client-sponsored program is available.

**Customization:** Complete customization based on client examples, objectives, etc. is available. They also provide limited customization to ensure industry relevance.

**Pre-assessments:** Management Style Questionnaire for each participant must be completed prior to program.

**Delivery options:** Trainers/consultants deliver the program; there is no co-facilitation with client trainers, train-the-trainer programs or program licensing.

**Prerequisites:** No

**The program design includes the following components:**
- Trainer/Consultant Presentation 30%
- Discussion 30%
- Group Activities/Role Plays 20%
- Case Studies 20%

**Standard materials provided with program:** Program binder with classroom materials and cases.

**Reinforcement/Follow-up options and associated costs:** Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

**Languages/Countries in which training solutions are currently offered:** The client-sponsored program is currently offered in English in the United States.
Leadership Communications

Modality: Classroom training
The single most important skill/competency area addressed in this program is:
- Communication Skills.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others

Course description: This program provides each participant with a method, some examples, and a limited experience of communicating as an inspiring leader of change.

Participant profile: The primary audience includes Directors/VPs. The secondary audience includes Senior VPs/C-level executives, Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Professional Services
- Government

Public & Client-Sponsored Program: A public program is not available. A client-sponsored program is available.

Customization: Complete customization is provided based on client examples, objectives, etc. Limited Customization is available to make content industry-relevant.

Pre-assessments: Not available

Delivery options: Trainers/consultants deliver the program; there is no co-facilitation with client trainers, train-the-trainer programs or program licensing.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 50%; Participant presentation 50%

Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Languages/Countries in which training solutions are currently offered: English in the United States.

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Leading Innovation and Change

Modality: Classroom training
The single most important skill/competency area addressed in this program is:
- Leading/Sponsoring Change Efforts.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Creativity and Innovation
- Business Acumen
- Thinking Globally

Course description: This course focuses on the elements needed to lead change from within: how to harness values, cultures, IT and relationships to generate innovation.

Participant profile: The primary audience includes Senior VPs/C-level executives. The secondary audience includes Directors/VPs.
Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare

Public & Client-Sponsored Program: A public program is not available. A client-sponsored program is available.

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is also available to provide industry relevance.

Pre-assessments: Not available

Delivery options: Trainers/consultants deliver program.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Case Studies 40%

Standard materials provided with program: Program binder with classroom materials and cases.

Reinforcement/Follow-up options and associated costs: We conduct participant evaluations immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Languages/Countries in which training solutions are currently offered: The client-sponsored program is currently offered in English in the United States.

Leveraging Culture

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Leading/Sponsoring Change Efforts.

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Creativity and Innovation
- Business Acumen

Course description: This program introduces the concept of organizational culture and how it influences members’ behavior at your organization and within your team. Learn to leverage culture to realize change.

Formal third party recognition and/or awards: Research upon which this course is based was awarded the 2004 Accenture Award.

Participant Profile for this Training Program: The primary audience includes Directors/VPs. The secondary audience includes Senior VPs/C-level executives, Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Government
- Utilities

Public & Client-Sponsored Programs: A public, open enrollment version of this program is not available. A client-sponsored program is available.
Section III – Program Files

Berkeley Center for Executive Development

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is available and is industry-relevant.

Pre-assessments: Not available

Delivery options: Trainers/consultants deliver the program; there is no co-facilitation with client trainers, train-the-trainer programs or program licensing.

Prerequisites: No

The program design includes the following components:

- Trainer/Consultant Presentation 20%
- Case Studies 40%
- Simulation 20%
- Other 20%

Standard materials provided with program: Program binder with classroom materials and cases.

Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Standard way to measure program effectiveness and individual behavior change: Learning evaluations.

Languages/Countries in which training solutions are currently offered: The client-sponsored program is currently offered in English in the United States.

Organizational Development

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

- Leading/Sponsoring Change Efforts

The secondary skills/competency areas addressed in this program are:

- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Increasing Performance of Others/Performance Management

Course description: This program addresses business leadership in organizational change on the individual, team, and organizational levels.

Participant profile: The primary audience includes Sr. VPs/ C-level executives, Directors/VPs and High potential leaders.

Most common industries represented by clients purchasing this offering:

- Healthcare
- Government
- Professional Services

Public & Client–Sponsored Programs; A public program is available. A client-sponsored program is available.

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is also available to provide industry relevancy.
Pre-assessments: Each participant must complete a Management Style Questionnaire prior to the program.

Delivery options: Trainers/consultants deliver the program.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 20%
- Discussion 30%
- Group Activities/Role Plays 20%
- Case Studies 30%

Standard materials provided with program: Program binder with classroom materials and cases.

Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.

Languages/Countries in which training solutions are currently offered: The client-sponsored program is currently offered in English in the United States.

Team Building

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- High Performing Teams.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others

Course description: This course examines the design, management, and leadership of task-performing teams in formal organizational settings. In particular, the course focuses on the interpersonal processes and structural characteristics that influence the effectiveness of such teams, individual behavior in face-to-face interactions and the dynamics of interpersonal relationships. The purpose of this program is to understand the theory and processes of team behavior so that you can successfully manage teams and work effectively in a variety of settings.

Participant profile: The primary audience includes High potential leaders. The secondary audience includes Senior VPs/C-level executives, Directors/VPs and Mid-level managers.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Government
- Utilities

Public & Client-Sponsored Programs: A public program is not available. A client-sponsored program is available.

Customization: Complete customization based on client examples, objectives, etc. is available. Limited customization is industry-relevant.
Pre-assessments: Not available
Delivery options: Trainers/consultants deliver the program.
Prerequisites: No
The program design includes the following components:
  • Trainer/Consultant Presentation 40%
  • Group Activities/Role Plays 60%
Standard materials provided with program: Program binder with classroom materials and cases.
Reinforcement/Follow-up options and associated costs: Participant evaluations are conducted immediately upon program completion. The results of these evaluations are reviewed with the client's program coordinator. Any changes required in future courses are implemented for future sessions.
Standard way to measure program effectiveness and individual behavior change: Learning evaluations
Languages/Countries in which training solutions are currently offered: The client-sponsored program is currently offered in English in the United States.
Center for Creative Leadership (CCL)

One Leadership Place
P.O. Box 26300
Greensboro, NC  27438-6300
http://www.ccl.org

Additional office locations continued:
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(Asia)
501 Orchard Road
#21-01Wheelock Place,
Singapore 238880
65-6835-6577

850 Leader Way
Colorado Springs, CO80906-1353
719-633-3891

8910 University Center Lane
Tenth Floor
San Diego, CA  92122-1029
858-638-8000

Center for Creative Leadership – Europe
Boulevard de la Woluwelaan
60B-1200 Brussels, Belgium
32-0-2-679-09-10

FINANCIAL PROFILE
Ownership/Funding:  Not-for-profit
Mergers/Partnership/Formal Alliance Activity:  Through our CCL Press and in alliance with Jossey-Bass, a Wiley Imprint, the Center has published a number of titles that disseminate the knowledge generated by our educational and research activities.
Annual fiscal revenue:  2 Years Ago - $50- 74 million; Last Fiscal Year - $50- 74 million

EMPLOYEE PROFILE
Total number of employees worldwide:  550

ORGANIZATION TENURE
Years in business:  20+; Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased the leadership training solutions last fiscal year:  2,418
Percentage of these client companies listed in the Fortune 500:  12.5%

COMPANY PROFILE
Leadership development philosophy:  The Center believes that self-knowledge is the single most important factor in the practice of leadership. Becoming more acutely aware of one's strengths and weaknesses is a type of "unfreezing" which leads to setting goals and taking action to improve. As a result, rather than teaching how to manage or analyze or strategize, we help leaders "learn how to learn" from their colleagues, their organizational and competitive contexts, and most importantly, from their own experience.

Three aspects of a leadership program that are most important to its success and effectiveness:  1.) Assessment - CCL combines 360-degree feedback, individual assessment and personalized attention in a safe, confidential environment designed to encourage candor, self-examination and experimentation with new behaviors vital to development; 2.) Challenge and 3.) Support.
LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is offered. There are currently 14 public, open-enrollment programs offered to clients. Stand-alone leadership Training Products are offered. Multiple Blended learning leadership programs/curricula are offered.

STANDARD INFORMATION FOR ALL PROGRAMS
Formal third party recognition and/or awards: The Financial Times has collectively ranked The Center for Creative Leadership's open-enrolment programs in the Top 10 worldwide for the past three consecutive years. And BusinessWeek ranks The Center first in the world in their biennial Executive Education Special Report.
Different client leadership models and/or other client-specific needs: CCL offers complete custom design as well as limited customization options. They develop tailored educational solutions for more than 200 client organizations each year. Through this applied practice, they structure and deliver programs focused on specific leadership development needs within the context of defined organizational challenges, including innovation, the merging of cultures and the development of a broader pool of leaders. The objective is to help organizations develop, within their own cultures, the leadership capacity they need to address challenges as they emerge.
Standard materials provided with programs: A participant's notebook is provided containing classroom presentation notes and references to the data discussed during the program.
Optional materials available and associated costs: Supplemental publications and additional assessments may be purchased.
Standard way to measure program effectiveness and individual behavior change: All participants are asked to evaluate their experience at the conclusion of their program.
Languages/Countries in which training solutions are currently offered: Programs are currently offered in English, Spanish, French and Chinese and can be delivered in a wide variety of countries through CCL and also through its network associates.

PROGRAM INFORMATION

360 By Design
Modality: e-Learning
The single most important skill/competency area addressed in this product is:
• Assessing/Developing Your Personal Leadership Skills/Style.
The secondary skill/competency area addressed in this product is:
• Can be tailored to match the needs of your organization.
Description of product/material: This 360-degree assessment for development resource is a fully Internet-supported feedback and development process that can be tailored to match the competencies important to your organization. This product has been in existence since 2001.
Most common industries represented by clients purchasing this product:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Professional Services
• Government
Total time to completion: Varies depending on competencies chosen.
Languages in which this product is currently offered: U.S. English.
Additional information or comments: 1.) Provides comparison of results with other successful managers; 2.) Provides ratings for both importance and competence
Allows options to customize names of rater categories, email notifications and additional survey questions; 3.) Offers a Development Planning Guide, helping participants focus feedback and develop a strategy for change; 4.) Uses a secure server, firewall technology and password access to ensure the security and anonymity of raters and the confidentiality of participant results

Please note: 360 By Design requires user certification.

**Foundations of Leadership**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Creativity and Innovation

**Course description:** The program prepares participants for more responsibilities by helping them learn the basics of effective leadership, with a particular focus on handling conflict in the workplace. Participants take away a set of realistic, attainable goals for improving performance. It’s an intensive experience that provides participants with a firsthand look at the challenges of leadership. This program has been in existence since 1987.

**Participant profile:** The primary audience includes Directors, VPs and Mid-level managers. The secondary audience includes Senior VPs, C-level executives and Supervisors and/or front-line managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Professional Services
- Process & Manufacturing
- Government

**Public Program:** A three-day public program is available.

**Prerequisites:** Participants must be leaders in the early stages of their careers.

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 35%
- Setting goals for development 15%
- Individual and peer feedback 20%

**Pre-work/Post-work:** Prior to the program, participants receive assessment-for-development questionnaires that are completed by participants and several of their colleagues. Participants receive a copy of their goals three months after the program to remind them of the areas they had intended to change.

**Reinforcement/Follow-up options:** Follow-up on coaching is available.

**Languages in which this public program is currently offered:** U.S. English and U.K. English
Countries in which this public program is currently offered: United States, Brussels, Canada
Total number of participants in the public, open enrollment version of this program in the last fiscal year: 636; 77% of these participants reside in the U.S.
Additional information: Participants gain an honest, often eye-opening appraisal of their strengths and shortcomings that is delivered in a safe environment. Participants also gain an understanding of their conflict behavior by learning to identify its nature and impact.
Client-Sponsored Program: A client-sponsored program is available.

The Looking Glass Experience

Modality: Classroom training
The single most important skill/competency area addressed in this program is:
  • Assessing/Developing Your Personal Leadership Skills/Style.
The secondary skills/competency areas addressed in this program are:
  • Problem Analysis/Problem Solving
  • Setting and Achieving Goals
  • Motivating/Inspiring/Engaging Others
  • Conflict Resolution
  • Communication Skills
  • Building Positive Relationships with Others
Course description: The program is designed to offer behavioral assessment through a realistic action-learning process. Participants gain key insights into their leadership strengths and development needs in an organizational setting using a hands-on, in-depth business simulation; group discussion; assessment; and peer feedback. This program has been in existence since 1980.
Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs and Mid-level managers. The secondary audience includes Supervisors and/or front-line managers.
Most common industries represented by clients purchasing this offering:
  • Financial Services & Insurance
  • Technology & Communications
  • Healthcare
  • Process & Manufacturing
  • Professional Services
  • Government
Public Program: A five-day public program is available.
Prerequisites: The program is designed for middle- to upper-level managers of individuals and/or projects who can benefit from an in-depth action-learning process that focuses on gaining insight into leadership strengths and development needs in an organizational setting. The program is best suited for individuals who learn through a hands-on, realistic situation, including group activities and feedback.
The program design includes the following components:
  • Trainer/Consultant Presentation 10%
  • Discussion 10%
  • Exercises/Quizzes 15%
  • Simulation 45%
  • Feedback from staff members and peers 10%
  • Goal Setting 10%
Pre-work/ Post-work: Prior to the program, participants and several of their colleagues complete assessment-for-development questionnaires. Participants are sent a reminder to follow up on goals set during the program.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Standard way to measure program effectiveness and individual behavior change: Follow-up on coaching is available.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 627; 77% of these participants reside in the U.S.

Additional information: The program focuses on the Center's "Looking Glass, Inc." business simulation, in which participants deal with the real-world problems of a top management team. The simulation plunges participants into a high-pressure management role at a fictional company, where they struggle with choices, pressures, and crises.

Client-Sponsored Program: A client-sponsored program is available.

Benchmarks

Modality: e-Learning

The single most important skill/competency area addressed in this product is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this product are:
- Problem Analysis/Problem Solving
- Time/Project Management
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Dealing with Ambiguity

Course description: A comprehensive 360-degree leadership assessment tool that measures strengths and development needs, encourages and guides change and offers strategic insights for middle to senior-level managers and executives. This product has been in existence since 1988.

Most common industries represented by clients purchasing this product:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Total time to completion: 30-40 minutes

Languages in which this product is currently offered: U.S. English, U.K. English, Spanish, French

Additional information: 1.) Provides comparison of results with other successful managers; 2.) Provides ratings for both importance and competence; 3.) Provides information on potential career blocks; 4.) Offers a Development Learning Guide, helping participants focus feedback and develop a strategy for change; 5.) Available in multiple languages; 6.) FYI - For Your Improvement

Please note: You must be certified to purchase and administer Benchmarks
Building Resilience: Leading in the Face of Change

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

- Leading/Sponsoring Change Efforts.

The secondary skills/competency areas addressed in this program are:

- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Building Positive Relationships with Others
- Creativity and Innovation
- Dealing with Ambiguity

Course description: This program offers participants a deeper understanding of leadership challenges posed by significant transitions, an opportunity to learn how to build and support an environment of trust, and an opportunity to develop authentic leadership capacities to facilitate the revitalization process in themselves and others. This program has been in existence since 2002.

Participant profile: The primary audience includes Directors and VPs. The secondary audience includes Senior VPs, C-level executives and Mid-level managers.

Most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Public Program: A five-day public program is available.

Prerequisites: This program is for mid- to upper-level line executives seeking to navigate the complexities of dramatic change and transition.

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 10%
- Group Activities/Role Plays 50%
- Individual and peer feedback 20%
- Coaching 5%
- Goal setting 5%

Pre-work/Post-work: Participants and several of their colleagues complete assessment-for-development questionnaires seven weeks before the start of the program. There is no post-work.

Languages in which this public program is currently offered: U.S. English

Countries in which this public program is currently offered: United States.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 45; 77% of these participants reside in the U.S.

Additional information: Leading People through Transitions is built on six years of experience in custom programs.

Client-Sponsored Program: A client-sponsored program is available.
Coaching for Development

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Coaching Skills

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others

**Course description:** The program builds coaching skills for leaders of organizations, enhances initiatives aimed at managing change, and fosters a climate of organizational learning. Participants learn to coach others for sustainable results. Participants assess their coaching styles and abilities and build new skills to employ in the business environment. This program has been in existence since 2001.

**Participant profile:** The audience includes Senior VPs, C-level executives, Directors, VPs and Mid-level managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

**Public Program:** A three-day public program is available.

**Prerequisites:** Eight weeks before the program, participants receive assessment-for-development questionnaires to be completed by several colleagues.

**The program design includes the following components:**
- Simulation 20%
- Dealing with difficulties 20%
- Impact of personality style on the coaching process 20%
- Individual peer feedback 20%
- Individual goal planning 20%

**Pre-work/Post-work:** Eight weeks before the program, participants receive assessment-for-development questionnaires to be completed by several colleagues. Three post-program coaching sessions are conducted by telephone and reinforce and extend classroom learning.

**Total number of participants in the public, open enrolment version of this program in the last fiscal year:** 79; 77% of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is available.

**Additional information provided:** The program offers a dynamic combination of classroom instruction, small group interaction, videotaped practice sessions, and peer coaching in a highly personalized learning environment. Three post-program coaching programs that are conducted by telephone reinforce and extend classroom learning.
Developing Leadership Talent: Strategies and Tools

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Talent Management (Recruiting/Retaining/Developing Others)

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Setting and Achieving Goals
- Communication Skills
- Building Positive Relationships with Others
- Creativity and Innovation
- Increasing Performance of Others/Performance Management

**Course description:** This program helps participants develop a strong understanding of a systems approach to increasing individual leadership capability and learn how to establish a more effective development system using different tools, techniques, and strategies. This program has been in existence since 1989.

**Participant profile:** The primary audience includes Senior VPs, C-level executives, Directors and VPs. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities

**Public Program:** A three-day public program is available.

**Prerequisites:** This program is for human resource executives, line managers, and professionals responsible for establishing and operating career and executive development systems in their organizations. Those who might benefit most are individuals with little to moderate experience in designing leadership development systems and those who want to learn how to establish a development process based on the use of assessment, challenge, and support.

**The program design includes the following components:**
- Trainer/Consultant Presentation 20%
- Discussion 30%
- Exercises/Quizzes 25%
- Case Studies 25%

**Pre-work/Post-work:** Participants and several of their colleagues complete assessment-for-development questionnaires that are used as samples in understanding different instrument options. Immediately following the program, participants may attend an optional Benchmarks certification workshop to become certified to purchase and use Benchmarks.

**Reinforcement/Follow-up options:** Follow-up on coaching is available.

**Total number of participants in the public, open enrollment version of this program in the last fiscal year:** 75; 77% of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is available.

**Additional information:** Participants learn to effectively design and implement executive development systems, including identifying potential and using job assignments to develop organizational leaders. Participants explore the best
assessment tools and practices, establish an HR network, and have the option of immediately earning Benchmarks certification.

**Developing the Strategic Leader**

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Strategic Thinking/Decision Making

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Strengthen skills of thinking, acting and influencing

**Course description:** The program is designed to help strategic leaders strengthen the skills of thinking, acting, and influencing. It focuses on the individual and how he or she interacts with others, leads strategic initiatives, influences strategic processes, and works within their organization to effectively shape and reach strategic goals. This program has been in existence since 1991. The date of last significant update/revision (defined as >=30% content revision) is 09/01/2004.

**Participant profile:** The primary audience includes Senior VPs and C-level executives. The secondary audience includes Mid-level managers, Directors, VPs.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Healthcare
- Process & Manufacturing
- Government
- Transportation
- Wholesale

**Public Program:** A five-day public program is available.

**Prerequisites:** The program is for upper-level managers who have significant roles in their organization’s strategic process or have general management responsibilities. It is not intended specifically for strategic planners or corporate development officers, but for business unit directors, staff leaders, and others who would benefit from learning new skills in the area of strategic leadership. Participants typically have eight to 15 years of management experience.

**The program design includes the following components:**
- Trainer/Consultant Presentation 5%
- Discussion 5%
- Exercises/Quizzes 15%
- Group Activities/Role Plays 15%
- Simulation 30%
- Peer and staff feedback from performance and questionnaires 20%
- Formulation of a self-directed action plan for dealing with the organization’s strategic issues 10%

**Pre-work/Post-work:** Eight weeks before the program, participants receive assessment-for-development questionnaires that they and several colleagues complete.
Participants are contacted with a reminder of their goals set during the program and are asked to provide updates on their progress toward those goals.

**Reinforcement/Follow-up options:** Follow-up on coaching is an additional, optional means of receiving post-program support.

**Total number of participants in the public, open enrollment version of this program last fiscal year:** 347; 77% reside in the U.S.

**Additional information:** The program has a 2 hour session of confidential one-on-one feedback with a Center professional. Two powerful simulations designed to reveal the individual's and others' behaviors in strategic situations include an outdoor orienteering exercise and a computerized representation of a global company.

**Client-Sponsored Program:** A client-sponsored program is available.

### Executive Dimensions

**Modality:** e-Learning

**The single most important skill/competency area addressed in this product is:**

**The secondary skills/competency areas addressed in this product are:**
- Problem Analysis/Problem Solving
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Business Acumen
- Thinking Globally

**Product description:** A 360-degree assessment that addresses the specific leadership issues at the top of an organization, providing personal behavioral feedback for leaders at the highest-level positions, where such feedback is less frequent. This product has been in existence since 1998.

**Most common industries represented by clients purchasing this product:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

**Total time to completion:** 20-30 minutes.

**Languages in which this product is currently offered:** U.S. English.

**Additional information:**
1.) Provides exclusive normative data, ensuring that participants are compared only to other top-level executives; 2.) Provides ratings for both importance and competence; 3.) Offers a Development Planning Guide, helping participants focus feedback and develop a strategy for change; 4.) FYI For Your Improvement; 5.) Translator included

### Leadership and High-Performance Teams

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- High Performing Teams

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
Setting and Achieving Goals  
Motivating/Inspiring/Engaging Others  
Coaching Skills  
Conflict Resolution  
Communication Skills  
Creativity and Innovation

Course description: This program helps team leaders improve the effectiveness of their organization's team by focusing on team leadership and performance rather than on individual growth and development; provides team leaders with practical tools to enhance team performance; and provides an opportunity to examine a range of team-related subjects, including team evaluation, the role of team leaders, the power of coaching, and conflict management. This program has been in existence since 1994.

Participant profile: The primary audience includes Senior VPs, C-level executives, Directors and VPs. The secondary audience includes Mid-level managers.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Professional Services
- Government

Public Program: A five-day public program is available.

Prerequisites: This program is for leaders of high-level teams and individuals responsible for creating team-based approaches.

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 10%
- Exercises/Quizzes 35%
- Group Activities/Role Plays 15%
- Feedback from peers and individual feedback 20%
- Goal setting for future development 10%

Pre-work/Post-work: Eight weeks before the program, participants receive assessment-for-development questionnaires that they and several colleagues complete. Participants also provide the center with information about their organization's current team. The program trainer also contacts participants after the program.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Total number of participants in the public, open enrolment version of this program in the last fiscal year: 68; 77% of these participants reside in the U.S.

Additional information: Unlike other high-level team programs, Leadership and High-Performance Teams is grounded in research, incorporates a personalized feedback component, and provides tools for diagnosing/resolving team problems in real time. The program provides research-based information about how high-performance teams work, honest appraisals of existing teams' strengths and weaknesses, and proven approaches for turning average performers into highly effective work groups.

Client-Sponsored Program: A client-sponsored program is available.
Leadership at the Peak

ModalitY: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Increasing Performance of Others/Performance Management

Course description: The program gives top executives the rare opportunity to join a small, powerful group of peers in evaluating and building leadership skills. The program blends self-discovery, self-development, and fitness activities and sets it all against a backdrop of real-world business themes. Participants return to the work world energized and enthusiastic and with a set of goals designed to make them better leaders and their organizations more successful. This program has been in existence since 1984.

Participant profile: The primary audience includes Senior VPs and C-level executives. The secondary audience includes Directors and VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Public Program: A five-day public program is available.

Prerequisites: This program is for senior executives with at least 15 years of management experience and with current leadership responsibility for geographically dispersed teams of more than 500 people. Admission is by application only, and strict entrance criteria ensure a comfortable learning environment. Top-level executives from smaller organizations are considered on a case-by-case basis.

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%
- Individual peer feedback 20%

Pre-work/Post-work: Eight weeks before the program, participants receive assessment-for-development questionnaires that they and several colleagues complete. After the program, participants are sent a reminder to check on their goal-setting progress.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Total number of participants in the public, open enrollment version of this program last fiscal year: 240; 77% of these participants reside in the U.S.
**Section III – Program Files**

**Center for Creative Leadership**

**Additional information:** The cornerstone of the program is extensive, personalized 360-degree feedback that is generated by colleagues and direct reports and delivered privately by the Center's professional staff.

**Client-Sponsored Program:** A client-sponsored program is available.

### Leadership Development for Human Resource Professionals

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program:**
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity

**Course description:** This program begins a process aimed at giving human resource professionals the information, skills, and self-confidence to become organizational leaders and more effective managers of people and processes, as well as influencers in strategic decision-making.

**Participant profile:** The primary audience includes Senior VPs and C-level executives. The secondary audience includes Directors, VPs and Mid-level managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

**Public Program:** A five-day public program is available.

**Prerequisites:** This program is designed for human resource professionals in middle- to senior-level management positions who want to become more effective and productive and, as leaders, to help others achieve these same goals.

**The program design includes the following components:**
- Exercises/Quizzes 25%
- Influence tactics and strategic leadership 25%
- Formulation of action plan and goal setting 25%
- Feedback to positively affect behavior 25%

**Pre-work/Post-work:** Assessment-for-development questionnaires are sent to participants, to be returned prior to attendance. There is no post-work.

**Standard materials provided with program:** A participant's notebook is provided containing classroom presentation notes and references to the data discussed during the program.

**Total number of participants in the public, open enrolment version of this program in the last fiscal year:** 115; 77% of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is not available.
Additional information: This program builds the self-awareness and confidence needed for leadership. Participants learn to establish a power base and influence tactics necessary in human resources today, increase motivation, and gain the ability to set and achieve organizational goals.

**Leadership Development Program (LDP)**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Creativity and Innovation

**Course description:** This is an intensive five-day program designed to show students how to develop the capacities needed for effective leadership by developing self-awareness, increasing self-confidence, taking a broad systemic view, thinking creatively, and learning from experience. This program has been in existence for 30 years.

**Third party recognition and/or awards:** LDP is sponsored by the Society for Human Resource Management.

**Participant profile:** The primary audience includes Senior VPs, C-level executives, Directors and VPs. The secondary audience includes Mid-level managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Process & Manufacturing
- Technology & Communications
- Professional Services
- Healthcare
- Government

**Public Program:** A five-day public program is available.

**Prerequisites:** The program targets experienced managers who have broad leadership responsibilities and could benefit from developmental experiences focusing on leadership capacities as part of a self-awareness-based learning process.

**The program design includes the following components:**
- Trainer/Consultant Presentation 15%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 10%
- Individual and peer feedback 25%
- Goal setting 10%

**Pre-work/Post-work:** Participants and several of their colleagues complete assessment-for-development questionnaires seven weeks before the start of the program. Participants receive a follow-up assessment three months after the program to measure progress.

**Reinforcement/Follow-up options and associated costs:** Follow-up on coaching is available. Prices vary.

**Standard way to measure program effectiveness and individual behavior change:** All participants are asked to evaluate their experience at the conclusion of their program.
Languages in which this public program is currently offered: U.S. English, U.K. English, and Spanish.
Countries in which this public program is currently offered: United States, Belgium, Mexico, and Canada.
Total number of participants in the public, open enrolment version of this program last fiscal year: 2,564; 77% of these participants reside in the U.S.
Client-Sponsored Program: A client-sponsored program is available.
Additional information: The Leadership Development Program (LDP)® has been in continuous operation since 1974 and is just as relevant today as it was 30 years ago. The success stems from an evaluation process it uses on itself--eliciting feedback from participants and using that information to modify the program where appropriate. The continuous research-based feedback has helped the Center to keep LDP fresh and timely, and the program's popularity bears out its importance to professionals today. There are more than 30,000 alumni of the program worldwide.

**Leading Creatively: Navigating Complex Challenges**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Creativity and Innovation

The Secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others

*Course description:* This program provides seasoned executives with the confidence and competence to develop and apply the innovative, intuitive sides of themselves and their staff to complement strictly analytical ways of looking at their business. This program has been in existence since 1995.

*Participant profile:* The primary audience includes Directors, VPs and Mid-level managers. The secondary audience includes Senior VPs, C-level executives and Supervisors and/or front-line managers.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

*Public Program:* A five-day public program is available.

*Prerequisites:* The program is for senior and upper-level managers who are dealing with strategic leadership challenges characterized by turbulence and chaos--where new creative perspectives are needed to deal with the challenges. It is also for managers responsible for maintaining and enhancing the creative climate of their organizations. Individuals who could benefit from this program represent a wide range of business responsibilities, from general management through strategic planning, marketing, product development, research, staff development, engineering and manufacturing.
The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Exercises/Quizzes 20%
- Creative problem solving 35%
- Individual and Organization Feedback 25%
- Goal Setting 10%

Pre-work/Post-work: Participants are asked to provide an insight writing assignment and complete several assessment-for-development questionnaires. The program manager contacts the participants via email immediately following the program and remains in contact with them periodically afterwards.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Standard way to measure program effectiveness and individual behavior change: All participants are asked to evaluate their experience at the conclusion of their program.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 36; 77% of these participants reside in the U.S.

Additional information provided: Participants learn how the integration of intellect and imagination can be used to create innovative solutions to both business and individual problems. They experience firsthand the value of visual, spatial, and holistic modes of thinking. The program utilizes the Center’s landmark assessment and feedback instruments.

Client-Sponsored Program: A client-sponsored program is available.

**Prospector**

*Modality:* e-Learning

The single most important skill/competency area addressed in this product is:
- Assesses an individual’s willingness to engage in and be open to learning from growth opportunities.

The secondary skills/competency areas addressed in this product are:
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Business Acumen
- Thinking Globally
- Seeks opportunity to learn
- Has the courage to take risks
- Commitment to making a difference

Course description: A 360-degree feedback tool that assesses an individual’s willingness to engage in and be open to learning from growth opportunities. This product has been in existence since 1994.

Participant profile: The audience includes Senior VPs with global responsibilities, C-level executives and High-potential leaders.

Most common industries represented by clients purchasing this product:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Total time to completion: 10-15 minutes
Languages in which this product is currently offered: U.S. English.

Additional information: This product includes 48 items in a straightforward, easy-to-complete format. It provides ratings for both importance and competence and allows participants and raters to complete the survey online and facilitators to receive feedback reports online. It provides comparisons with successful global leaders. It offers a Development Learning Guide, helping participants focus feedback and develop a strategy for change. FYI - For Your Improvement Translator available.

The African American Leadership Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Creativity and Innovation

Course description: The goals of the program are to examine participants' leadership style in the context of research, focusing on the career paths of minority leaders; to understand their impact on their organization and those they work with; and to set a course toward greater effectiveness and responsibility. Participants learn how to enhance their strengths and work with their weaknesses in order to better direct their personal and professional development. This program has been in existence since 1995.

Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs and Mid-level managers. The secondary audience includes Supervisors and/or front-line managers.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Public Program: A five-day public program is available.

Prerequisites: This program is for middle- to senior-level African American managers who can benefit from a unique approach to exploring the forces that affect their professional performance and career advancement. Participants come from a wide range of companies and represent diverse backgrounds and skills.

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 25%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 10%
- Goal Setting 10%

Pre-work/Post-work: Participants and several of their colleagues complete assessment-for-development questionnaires seven weeks before the start of the
program. A reminder is sent to participants following the program in order to check on goals set during the program.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 36; 77% of these participants reside in the U.S.

Additional information: The program combines contemporary leadership theory and its practical applications. Research-based models focus on career development implications for African American managers working in traditional organizations. Individual assessment tools that offer information on personal styles and leadership competencies are also included. It is one of a very few programs that is designed for and staffed by African Americans.

Client-Sponsored Program: A client-sponsored program is available.

The Women's Leadership Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:


The secondary skills/competency areas addressed in this program are:

- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Communication Skills
- Building Positive Relationships with Others
- Influencing others

Course description: This program brings powerful assessment and feedback elements together with research-based content that delves into issues and perceptions surrounding women's leadership and work experiences. In addition to clarifying strengths and development areas and working with models of power and influence, participants explore the choices and tradeoffs they face as women juggling personal and professional objectives. This program has been in existence since 1968.

Participant profile: The primary audience includes Directors and VPs. The secondary audience includes Senior VPs, C-level executives and Mid-level managers.

Most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Healthcare
- Process & Manufacturing
- Government
- Wholesale
- Transportation

Public Program: A five-day public program is available.

Prerequisites: This program is designed for women in mid-level and senior leadership positions who can benefit from a developmental experience with other professional women.

The program design includes the following components:

- Trainer/Consultant Presentation 15%
- Discussion 20%
- Exercises/Quizzes 25%
- Case Studies 10%
- Action planning 10%
- Peer and individual feedback 10%
Pre-work/Post-work: Participants complete assessment-for-development questionnaires and are assigned an interview with a senior executive in their organization. Participants are contacted following the program in order to check on goals set during the program.

Reinforcement/Follow-up options: Follow-up on coaching is available.

Total number of participants in the public, open enrolment version of this program last fiscal year: 174; 77% reside in the U.S.

Additional information: The program is based on the Center's groundbreaking research into how professional women lead their lives and what factors influence their effectiveness in the work world. The program is led entirely by women, which offers a comfortable environment for a dynamic learning experience.

Client-Sponsored Program: A client-sponsored program is available.
Darden Executive Education, University of Virginia

100 Darden Boulevard, Charlottesville, VA 22903
434-924-3000
http://www.darden.virginia.edu/execed/

Sales contact: Susan Brooks
434-924-3904
brookss@darden.virginia.edu

FINANCIAL PROFILE
Ownership/Funding: Not-for-profit

ORGANIZATION TENURE
Years in business: 20 years+; Years as a leadership training vendor: 20 years+

LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is available. There are on average 30 – 39 open enrollment sessions each year. The number of client-sponsored programs varies each year. Darden Executive Education has the capability to, and has in the past offered e-Learning programs. At this time, the programs are onsite at Darden, or offsite at the client's organization. The majority of their programs offer some sort of blended learning.

STANDARD INFORMATION FOR ALL LEADERSHIP TRAINING SOLUTIONS
Reinforcement/Follow-up options and associated costs: Participants are invited to join Darden's Lifelong Learning community via letter follow-up post program. (No associated costs)

The standard way to measure program effectiveness and individual behavior change is as follows: Upon program completion, participants return an evaluation. Participants’ comments are utilized to improve the learning within each program.

Languages/countries in which programs are offered: U.S. English/United States
Customization: With the exception of The Executive Program, all of Darden Executive Education programs can be designed in the custom format. Companies should contact Darden Executive Education for further information.

PROGRAM INFORMATION
Creating and Sustaining the High-Performing Organization

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- High performing teams

The secondary skills/competency areas addressed in this program are:
- Motivating/inspiring/engaging others
- Communication Skills
- Leading/sponsoring change efforts

Course description: Creating and Sustaining the High-Performing Organization is designed to challenge participants to think and act in ways that will contribute to establishing and sustaining high performance. Building on the three Ps of people, process, and perspective, the program’s activities incorporate the system’s thinking necessary to integrate the disciplines of performance improvement, customer focus, learning, and change. This program has been in existence since 1985. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

Participant profile: The audience includes all levels of management.
The most common industries represented by clients purchasing this offering;
- Process and manufacturing
- Professional services
- Government.

Public Program: A five-day public program is available. The public program format consists of 25% discussion and 75% on case studies.
Pre-work/Post-work: Reading materials are sent to participants prior to the program. There is no post-work.

The total number of participants in the public, open enrollment version of this program last fiscal year: 43. 95% of these participants reside in the U.S.

The top competitive offerings by program name and vendor:
1. Strategic Business Leadership: Creating and Delivering Value by Chicago
2. Energizing People for Performance by Kellogg

Creating the Future: The Challenge of Transformational Leadership

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Motivating, inspiring and engaging others

The secondary skills/competency areas addressed in this program are:
- Coaching skills
- Building positive relationships with others
- Increasing performance of others/performance management

Course description: This intensive program challenges executives to think in new ways about the future of their businesses and provides fresh perspectives on leadership strategies for competing effectively in a complex and changing world. The program is designed for senior executives and/or executive teams who are challenging the status quo, and recognize the dangers of not leading in a changing environment, and who are committed to building organizations and management teams that produce extraordinary results. Additionally, participants have an opportunity to receive leadership feedback from associates in their organizations who are critical to success in their current roles. This program has been in existence since 1989. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

Participant profile: The primary audience includes Senior VPs and C-level executives.

The most common industries represented by clients purchasing this offering are:
- Technology & Communications
- Process & Manufacturing
- Professional Services
- Government

Public Program: A four-day public program is available.

The program format is broken down into the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

Pre-work/Post-work: Pre-work involves completion of the Leadership Practices Inventory (LPI) and a Qualitative Feedback form. There is no post-work.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 100, 93% of these participants reside in the U.S.
**Implementing Change from the Middle**

*Modality:* Classroom training  

The single most important skill/competency area addressed in this program is:  
- Leading/sponsoring change efforts.

The secondary skills/competency areas addressed in this program are:  
- Strategic Thinking/Decision Making  
- Setting and Achieving Goals  
- Dealing with change challenges within organizations

**Course description:** This fast-paced workshop is action-oriented and explores the unique challenges faced by those managers who are tasked with implementing important change initiatives. During the program we work to blend theory and ideas, best practices and case studies, and a broad variety of change challenges in such a way that participants leave Darden with a firm sense of what to do next based on where they are in the change process. This ensures an immediate transference of learning back into the work environment. This program has been in existence since 2002. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes High potential leaders.

The most common industries represented by clients purchasing this offering:  
- Process & Manufacturing  
- Professional Services  
- Government

**Public Program:** A three-day public program is available.

The public program format consists of the following components:  
- Discussion 10%  
- Case Studies 25%  
- Other 25% -participants bring a change challenge to the program and work on it during the program which allows them to apply the learning in real-time to a situation that is of direct importance to them and their companies.

**Pre-work/Post-work:** Preparation materials are sent in advance or set up in a learning portal. There is no post-work.

The total number of participants in the public, open enrollment version of this program during the last fiscal year: 50; 98% of these participants reside in the U.S.

The top 3 competitive offerings by program name and vendor are:  
1. Creating the Market-Focused Organization by Kellogg  
2. Leading in Times of Turbulence and Change by Wharton  
3. Leading Change and Innovation by Chicago

**Client-Sponsored Program:** A client-sponsored program is also available.
Leadership for Extraordinary Performance

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program:**
- Motivating/inspiring/engaging others.

**The secondary skills/competency areas addressed in this program:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Coaching Skills
- High Performing Teams
- Leading/Sponsoring Change Efforts

**Course description:** A provocative, action-oriented program designed to nurture the clarity of vision and personal leadership which inspires others to extraordinary performance; to enhance skills at gaining commitment from key people in the organization; and to present a unique approach to managing the fulfillment of commitments of individuals and groups at work. This program has been in existence since 1980. The date of last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes Supervisors and/or front-line managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Process & Manufacturing
- Professional Services
- Government
- Professional Services

**Public Program:** A four-day public program is available.

**This program is broken down into the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Group Activities/Role Plays 5%
- Case Studies 20%
- Workshop 15%

**Pre-work/Post-work:** Leadership Practices Inventory (LPI); 2 case studies to read; participants have discussions with their managers about participants' leadership styles. There is no post-work.

**Reinforcement/Follow-up options and associated costs:** Participants are encouraged to network regularly with fellow classmates. Participants are also invited to join Darden's Lifelong Learning community via letter follow-up post program. (No associated costs.) To measure program effectiveness and individual behavior change, there is an exercise that involves the participants writing a letter to someone whose leadership style has influenced them the most. In this letter, participants say how they want to change their leadership style.

**The total number of participants in the public, open enrolment version of this program in the last fiscal year was:** 140; 94% of these participants reside in the U.S.

**The top 3 competitive offerings by program name and vendor are:**
1. Leading Change and Innovation by Chicago
2. The Leadership Journey: Creating and Developing Your Leadership by Wharton
3. Leading High-Impact Teams by Kellogg

**Client-Sponsored Program:** A client-sponsored program is also available.
Management Development Program: Driving Vision, Action, and Results

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Strategic Thinking/Decision Making.

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Appreciating Diversity
- Creativity and Innovation
- Business Acumen
- Thinking Globally

**Course description:** The program prepares middle management executives to become more effective leaders in their organizations. It provides an enterprise-wide, action-oriented, performance-driven perspective that is necessary to be successful in today’s dynamic and competitive business environment. By developing a broad understanding of the enterprise and the connectivity of business activity, the program provides an opportunity for participants to focus and drive actions that will enhance their organizations’ effectiveness and bottom-line results. Participants will develop the ability to clearly analyze and persuasively articulate business positions, and take actions that lead to positive results. A key feature of the course is the Application Workshop in which participants can directly apply program learning to a pressing business challenge in which they are currently engaged. During the workshop, participants will transform their particular challenge into an executable plan. This program has been in existence since March 2005. The date of last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers and high potential leaders.

**The most common industries represented by clients purchasing this offering are:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** An 11 day public program is available.

**Prerequisites:** Approximately eight or more years of managerial experience.

**This program is broken down into the following components:**
- Discussion 20%
- Case Studies 65%
- Application Workshop 15%

**Pre-work/Post-work:** Advanced reading materials are sent to program participants approximately four weeks before the program’s start date. There is no post-work involved.

**The top 3 competitive offerings by program name and vendor are:**
1. Program for Management Development by Harvard
2. Management Development Program by University of Michigan
3. Executive Development Program - The Transition from Functional to General Management by University of Chicago

**Client-Sponsored Program:** A client-sponsored program is also available.
Managing Individual and Organizational Change

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Leading/Sponsoring Change Efforts.

**The secondary skills/competency areas addressed in this program are:**
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
- Business Acumen
- Handling all aspects of change

**Course description:** The focus of this program is on individuals in managerial roles that are trying to lead, manage, and deal with the change process. The focus then shifts to groups and the total organization. Throughout the program, emphasis is placed on the individual as manager and model of change. This program has been in existence since 1977. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes High potential leaders.

**The most common industries represented by clients purchasing this offering are:**
- Process & Manufacturing
- Professional Services
- Government

**Public Program:** A three-day public program is available.

**This program is broken down into the following components:**
- Discussion 25%
- Case Studies 75%

**Pre-work:/Post-work:** Advanced reading materials are sent to participants prior to the program's start date. There is no post-work involved.

**The total number of participants in the public, open enrolment version of this program in the last fiscal year:** 50; all of these participants reside in the U.S.

**The top 3 competitive offerings by program name and vendor are:**
1. Leading Change and Innovation by University of Chicago
2. Leading in Times of Turbulence and Change by Wharton
3. Energizing People for Performance by Kellogg

**CLIENT-SPONSORED PROGRAM**
A client-sponsored program is also available.

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**Power and Leadership**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**

**The secondary skills/competency areas addressed in this program are:**
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Leading/Sponsoring Change Efforts
- Creativity and Innovation

**Course description:** Participants engage in a powerful leadership model that includes personal characteristics, strategic thinking skills, abilities in influencing others, creating
inspiring organizational designs, and principles of leading change. Each will be applied to a variety of challenges at the organizational, workgroup/functional, and personal levels. This program will stretch your view of leadership, your techniques of influence, and your role in your organization. In the end, it is leadership for results--results based on engaged teamwork rather than coercive mercenary models. This program has been in existence since 1989. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers and high potential leaders.

**The most common industries represented by clients purchasing this offering:**
- Process & Manufacturing
- Professional Services
- Government

**Public Program:** A public program is available.

**This four-day program is broken down into the following components:**
- Discussion 20%
- Group Activities/Role Plays 5%
- Case Studies 25%
- Interactive introduction to Aikido, a Japanese martial art, and the lessons it teaches for leadership 20%
- Half-day outdoor experiential learning exercise on team building and stretching personal boundaries 30%

**Pre-work/Post-work:** An online program portal is used for advance work. There is no post-work.

**The total number of participants in the public, open enrolment version of this program in the last fiscal year:** 50; 96% of these participants reside in the U.S.

**The top competitive offerings by program name and vendor are:**
1. The Leadership Journey: Creating and Developing Your Leadership by Wharton
2. Leading High-Impact Teams by Kellogg

**Client-Sponsored Program:** A client-sponsored program is also available.

### Seizing Opportunities: Influencing to Win

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Communication Skills.

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Recognizing opportunities

**Course description:** Designed for executives who are wrestling with their effectiveness to lead, influence, and negotiate, this program integrates the skills of negotiation with the challenges of leadership to help participants increase their levels of influence and authority in any situation and improve their abilities to take advantage of opportunities. This program has been in existence since 2002. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers and high potential leaders.
The most common industries represented by clients purchasing this offering are:

- Process & Manufacturing
- Professional Services
- Government

Public Program: A three-day public program is available.

This program is broken down into the following components:

- Discussion 35%
- Case Studies 65%

Pre-work/Post-work: Advance-reading materials are sent to participants. There is no post-work required.

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 30; 93% of these participants reside in the U.S.

The top 3 competitive offerings by program name and vendor are:
1. Competitive Strategy by Kellogg
2. Building Relationships That Work by Wharton
3. Strategic Business Leadership: Creating and Delivering Value by Chicago

Client-Sponsored Program: A client-sponsored program is also available.

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**Strategic Decision Making**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:

- Strategic Thinking/Decision Making.

The secondary skills/competency areas addressed in this program are:

- Problem Analysis/Problem Solving
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Dealing with Ambiguity

**Course description:** This program enhances managers’ abilities to obtain insight and exercise judgment by deepening their decision-making skills and helping them to design more effective decision processes. The program provides opportunities for participants to learn to: 1.) Avoid common decision mistakes, 2.) Learn from experience by implementing effective decision audits, 3.) Manage risk proactively and harness uncertainty to improve results and navigate competitive environments, 4.) and achieve strategic insight and success. This program has been in existence since 2002. The date of the last significant update/revision (defined as >=30% content revision) is 06/05/2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes Supervisors and/or front-line managers and High potential leaders.

The most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Process & Manufacturing
- Professional Services
- Government

Public Program: A three-day public program is available.

This program is broken down into the following components:

- Discussion 40%
- Case Studies 60%
Pre-work/Post-work: Participants are sent an advance package of information. There is no post-work required.

The total number of participants in the public, open enrollment version of this program the last fiscal year: 21; all of these participants reside in the U.S.

The top 3 competitive offerings by program name and vendor are:
1. Negotiation and Decision Making Strategies for Managers by Chicago
3. Negotiation Strategies for Managers, by Kellogg

Client-Sponsored Program: A client-sponsored program is also available.

The Executive Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- High Performing Teams
- Building Positive Relationships with Others
- Appreciating Diversity
- Thinking Globally

Course description: A stimulating learning environment that enables participants to respond to the challenges of a competitive global environment. They will broaden and sharpen their perspectives with respect to important social, cultural, political, and economic factors that influence the global business environment and understand the importance of a management framework comprised of functional expertise, shared values, teamwork, and ethical leadership. They will learn how to create value at multiple levels for themselves, others, their enterprises, and economies and formulate and implement strategies for competitive advantage. Participants will gain understanding in how to lead with vision, wisdom, and integrity while encouraging others to do the same; understand, manage, and lead the change process; rethink business processes; and engage in systems thinking; enhance decision-making capability that will generate superior results. This program has been in existence since 1958. The date of the last significant update/revision (defined as >=30% content revision) is 07/05/2004.

Participant profile: The primary audience includes Senior VPs/C-level executives

The most common industries represented by clients purchasing this offering are:
- Process & Manufacturing
- Professional Services
- Government

PUBLIC PROGRAM

A four-week public program is available.

Prerequisites: Participants should have 12 years or more of managerial experience; be sponsored by their organizations and have the endorsement of senior management.

This program is broken down into the following components:
- Discussion 10%
- Group Activities/Role Plays 10%
- Case Studies 75%
- Simulation 5%
Pre-work/Post-work: Reading materials are sent to participants. An optional user-friendly, self-paced computer software package on the fundamentals of financial accounting and reporting is available. This reviews balance sheets, income statements, cash-flow statements, financial ratios, and present-value analysis. There is no post-work involved.

Optional materials available and associated costs: An optional user-friendly, self-paced computer software package on the fundamentals of financial accounting and reporting is available. This reviews balance sheets, income statements, cash-flow statements, financial ratios, and present-value analysis. There is no cost for this software package.

The total number of participants in the public, open enrolment version of this program last fiscal year: 29; 79% of these participants reside in the U.S.

The top 3 competitive offerings by program name and vendor are:
  1. The Columbia Senior Executive Program, Columbia
  2. Advanced Management Program, Wharton
  3. Advanced Executive Program, Kellogg (Northwestern)

Client-Sponsored Program: A client-sponsored program is also available.
Development Dimensions International, Inc. (DDI)

1225 Washington Pike
Bridgeville, PA 15017
1-800-933-4624
http://www.ddiworld.com
http://www.ddiworld.com/our_expertise/leadership.asp

Sales contact:
Client Relations Group
1-800-933-4624
info@ddiworld.com

FINANCIAL PROFILE
Ownership/Funding: Privately held
Mergers/Partnership/Formal Alliance Activity (over the last 24 months):
Workscape - This alliance leverages Workscape’s robust online applications with DDI’s Performance Management solution to create a unique process for goal setting, goal tracking, and managing performance. LearnShare: DDI’s web-based learning, content, and training capabilities are available to LearnShare participants, a consortium of 27 Fortune 500 and large corporations. Microsoft Corporation: DDI provides its hiring competencies and interview guide questions through Microsoft's Office Solution Accelerator for Recruiting. DDI's e-Learning platform partners include: SumTotal Systems, CyberU, DigitalThink, Docent, Learnshare and Saba.

Annual fiscal revenue: 2 Years Ago - $75 million+; Last Fiscal Year - $75 million+
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching): 2 Years Ago - $50 million+; Last Fiscal Year - $50 million+
Percentage of revenue from leadership offerings delivered outside the U.S.: 21-25%
Profitability based on last fiscal year: EBITDA profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 900
Total number of employees delivering leadership-training solutions: 296
Total number of certified contractors delivering leadership-training solutions: 159
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions: DDI's FlexSolutions service features an established network of consultants, from which DDI can handpick facilitators whose profiles, location, experience, and other criteria best complement specific needs. For large training delivery projects, DDI selects a team of consultants from this group to receive in-depth training on the client's unique needs. These professionals then become your consulting team for ongoing and future projects, working as a readily accessible extension of your internal staff. DDI instructors are hired only after undergoing a rigorous assessment and selection process comprised of: Individual phone screening interviews; Face-to-face in-depth interviews; Observation of the individual's training skills through a presentation and Reference Check. The required qualifications for DDI instructors include: Demonstrated capability of program instruction in two or more training systems or programs; Consulting/training experience with line management and senior managers preferred; BA or BS degree; advanced degree preferred but not mandatory; participation in professional organizations in the training/consulting field.
Total number of developers of leadership training solutions: 40

ORGANIZATION TENURE
Years in business: 20 years+; Years as a leadership training vendor: 20 years+
CLIENT PROFILE

Number of client companies who purchased leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 793

Percentage of client companies listed in the Fortune 500: 10%

Top 5 client companies:
- U.S. Air Force
- Bank of America Corporation
- Hospital Corporation of America
- Cox Enterprises Inc.
- PepsiCo Inc.

Top 5 competitors:
- Achieve Global
- Personnel Decisions International
- Center for Creative Leadership
- Forum
- Gallup

Customer Service infrastructure/philosophy: The most important measure of DDI’s success is realization for clients. The organizational philosophy is to be a partner with clients, and to offer programs and services that contribute to their success. In order to evaluate effectiveness, quality, and business results throughout the life of each project, DDI and the client jointly establish measures and devise a plan that includes one or more of DDI’s evaluation techniques in order to gather and share feedback. The results are then used to make adjustments as appropriate to ensure continuous improvement and customer satisfaction.

Client forums or advisory boards: DDI has conducted client advisory boards since 2001 and will continue to do so in 2005. The DDI Client Summit is held in the US each year for all clients. DDI has conducted Level 1 & 2 studies with 300 clients and Level 3 & 4 for over 20 clients in the last 24 months.

COMPANY PROFILE

Organization’s investment in R&D as a percentage of leadership sales revenue: 11-15%

Organization’s leadership development philosophy: Leaders, especially those on the front line, are the single most important ingredients for building an engaged, high-performance workforce. DDI’s leadership development programs provide workable solutions for everyday and long-term business needs. Over the past 33 years DDI has conducted ongoing research on the competencies that define effective leadership and they’ve seen the role of frontline leaders grow in importance and complexity. To better understand and define this critical role, they’ve identified seven essential capabilities, or Leadership Imperatives, that Frontline leaders must master to be effective in their jobs: COACH and DEVELOP for Results, DRIVE PERFORMANCE, INSPIRE Loyalty and Trust, MANAGE Work, PARTNER Within and Across Teams, INFLUENCE Through Personal Power, and SELECT TALENT. The new courses have been designed to incorporate highly relevant issues and challenges faced by today’s leaders. They offer a comprehensive approach to leadership development: up-front assessment, a competency-based curriculum of more than 50 programs that can be configured to meet your specific needs and consulting expertise aimed at ensuring a flawless roll-out tied to concrete measures of success. The focus of every DDI leadership development course is on behavior change and competency development. Participants acquire new skills and abilities through fast-paced learning design and engaging, interactive activities such as simulations, exercises, learning maps, discovery learning and job-relevant case studies. They also utilize a streamlined behavior modeling process to optimize skill development and to emphasize the application of course knowledge to on-the-job performance.
The three aspects of a leadership program design that are most important to its 
success and effectiveness are: 1.) Up-front Assessment & Diagnosis (Offerings: 
Leadership Mirror & Leadership Needs Analysis & Assessing Talent): All learning 
objectives are linked to the relevant key actions from the leadership competencies for 
each program; 2.) Engaging learning design to drive behavior change: Use of a wide 
variety of instructional materials including behavior model videos, case studies and skill 
practices; and 3.) Realization: A sustainable, positive change in people performance 
that dramatically increases the ability of an enterprise to achieve its business goals: 
Extensive use of applications and tools such as job aids and designing courses and in-
built support tools for senior and frontline leaders.

LEADERSHIP TRAINING DELIVERY METHODS

- Classroom training is offered
- There are currently 85 distinct client-sponsored programs
- There were 250 distinct custom-designed programs conducted last year
- Classroom training represented 50-74% of the leadership revenue in the last 
fiscal year.
- There are 27 e-Learning programs offered.
- e-Learning represented 0-24% of the leadership revenue in the last fiscal year.
- Stand-alone leadership training products are not offered.
- Blended learning represented 25-49% of the leadership revenue in the last fiscal 
year

Additional information: DDI has been developing leaders for over three decades. 
They estimate that over five million leaders across 3,000 organizations have participated 
in their leadership experiences. Some of the unique capabilities include: Multiple 
leadership-level offerings from senior leaders to front-line leaders; Curricula based on 
research around leadership competencies/success profiles done in hundreds of 
organizations; focus on sustainable implementations and business impact; strong ability 
to service/deliver globally with wholly owned centers of excellence; true blended 
curriculum with full customization ability.

STANDARD INFORMATION FOR ALL TRAINING SOLUTIONS

Most common industries represented by clients:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Formal third party recognition and/or awards: HRE Award - Human Resources 
Executive Magazine named the IM: EX system as one of the top five training products of 
2003-2004. Consortium for Research on Emotional Intelligence in Organizations - 
Designated DDI's Interaction Management as one of 14 model programs that meet "best 
practice" criteria for successfully raising the level of emotional and social competence for 
a dults in the workplace.

DDI’s web-based training (WBT) courses were the first to receive the ASTD (American 
Society for Training and Development) prestigious e-Learning Courseware Certification 
(ECC) for the entire library of WBT courses. DDI is a charter member of ASTD’s 
Platinum Vanguard Circle for ECC.
CLASSROOM TRAINING SOLUTIONS
Delivery options available to clients:
  • DDI trainers/consultants deliver program
  • Co-facilitation with client trainers
  • Train-the-trainer programs and program licensing (most common option)
Customization: There are four levels of customization available, ranging from light customization to full custom design.
Blended curriculum available for all solutions: Many of DDI’s training solutions can be delivered in a classroom experience or through asynchronous e-Learning. When e-Learning is the chosen solution for learning the new concepts and behaviors, clients are actively encouraged to include in-person learning labs as a means for skills practice and feedback. Also, all DDI solutions are supported by DDI’s electronic performance support system called OPAL. OPAL provides reinforcement of the skills learned via classroom or e-Learning and is highly effective for just-in-time learning/reinforcement to support continuous improvement.
BLENDING CURRICULA OPTIONS
Option One - E-Learning + Learning Labs + OPAL
Component 1 – E-Learning:
  • Web-based training or CD-ROM, asynchronous (self-paced)
  • Self study
  • WBT courses feature a high rate of user interaction. Learners frequently answer questions or complete exercises, which keeps the experience engaging. Accelerated learning paths are also available.
Duration: 2-3 hours
Stand-alone available: Yes
Pre-assessments: Knowledge Check. Learners can customize their learning by testing out of sections, keeping them focused on the learning they need. Leaders can test their knowledge as many times as needed through Mastery Checks.
Percentage of each instructional technique for the e-learning component:
  • Audio 20-39%  • Simulations <20%
  • Video 20-39%  • Scenarios 20-39%
  • Static Pages 20-39%  • Quizzes 20-39%
Help Desk Support: Normal business hours; For current language availability, please contact DDI directly; In-House
Operating systems on which this program is compatible: Windows 98, 2000, NT, ME, XP
Minimum Bandwidth: Dial up
Browser(s) on which this program is compatible: IE Explorer 5.x, 6.x
Compatible/Compliant: SCORM compatible; AICC compatible; Section 508 Non-compliant; Learning Management Systems: All major ones have been tested and are compatible with this program.
Component 2 - Learning Labs:
Description: Modular practice and application session designed specifically for each web-based course. Facilitators can use a single modular lab or combine labs. Material Masters included in price of WBT License.
Duration: 1½-3½ hours per lab
Stand-alone available: No
Component Three - OPAL – Online Performance and Learning:
(Electronic Performance Support) Just-in-Time format; delivered 100% online

**Option Two – Classroom + OPAL**

**Component 1 – Classroom:**
*Module:* Classroom training
*Description:* A module or modules selected from the IM:EX curriculum that includes skill introduction, practice and feedback.
*Stand-alone available:* Yes
*Delivery options:* Trainers/consultants deliver program; Co-facilitation with client trainers is available; Train-the-trainer programs and program licensing are available.
*Duration of classroom training:* ½ day for each program module (optional full-day)
*Pre-assessment available:* Knowledge Check assesses if the participant already possesses the skills that would be taught in the course.
*Standard materials provided with program:* Facilitator Guide, Workbook, Job Aid, and Wall Charts

**Component 2 - OPAL – Online Performance and Learning:**
*Modality:* e-Learning
*Description:* Just-in-Time format, delivered 100% online
*Languages in which programs are currently offered:* 14 languages including English, French, German, Spanish, and Mandarin
*Countries in which programs are currently offered:* They are globally available based on language.
*Standard way to measure program effectiveness and individual behavior change:* Center for Applied Behavioral Resources (CABER) produces up-to-date research summaries and findings

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**PROGRAM INFORMATION**

**Achieving Your Leadership Potential**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program are:**
- Continuous Learning
- Initiating Action

**Course description:** This course bridges the widening gap between what is needed and required of today’s leaders. A three-step process - Diagnose, Plan, and Execute - helps learners stretch their capabilities and accelerate their leadership development. This program has been in existence since 1975. The date of last significant update/revision (defined as >=30% content revision) is 10/22/2003.

**Participant profile:** The audience includes all management levels equally.

**Prerequisites:** No

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

**Pre-work/Post-work:** A booklet is given for pre-work. There is no post-work.

**Reinforcement option:** OPAL
Adaptive Leadership

Modality: Classroom Training

The single most important skill/competency area addressed in this program is:
- Building Positive Relationships with Others

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Communication Skills
- Gaining Commitment
- Valuing Diversity

Course description: Adaptive Leadership raises leaders' awareness of the differences among people and situations. It teaches leaders how to tailor their approaches based on their team members' motivations, personality styles, the organizational environment, and the situation. By better meeting the needs of each individual, leader's create higher levels of engagement and organizational results. This program has been in existence since 1975. The date of last significant update/revision (defined as >=30% content revision) is 09/01/2003.

Participant profile: The audience includes all management levels equally.

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-learning version)

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

Reinforcement option: OPAL

Boosting Business Results

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Building Positive Relationships with Others

The secondary skills/competency areas addressed in this program are:
- Initiating Action, Decision Making
- Planning and Organizing
- Work Standards

Course description: This course teaches leaders a proactive, strategic process they can apply to leverage their leadership skills so that business objectives will be realized. Designed to follow an IM: EX curriculum (typically three to six courses), this course has leaders identify a project or task that will require the effective use of newly learned leadership skills to achieve or enhance success. Leaders also determine goals and measurement methods that will help them track and demonstrate the results of their effective leadership. This program has been in existence since 1975. The date of last significant update/revision (defined as >=30% content revision) is 04/01/2004.

Participant profile: The primary audience includes High potential leaders, Mid-level managers and Supervisors and/or front-line managers.
Section III – Program Files

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-learning version)

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

Pre-work/ Post-work: Pre-work is optional. There is no post-work.

Reinforcement option: OPAL

Building an Environment of Trust

Modality: Classroom

Trust: Strengthening the Foundation

Modality: e-Learning

The single most important skill/competency area addressed in this program is:
- Building Positive Relationships

The secondary skills/competency areas addressed in this program are:
- Building Trust
- Communication Skills
- Building a Successful Team
- Integrity

Course description: This module builds awareness of these traps and strategies, helping leaders create an environment in which people take risks, identify and solve problems, and work together. The web-based version was launched in November 2000. The classroom version of the program was newly updated in 2004.

Participant profile: The primary audience is Mid-level managers. The secondary audience includes High potential leaders and Supervisors and/or front-line managers.

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-learning version)

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

E-Learning format (Web or CD-ROM): 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. Live practice is encouraged through a learning lab for the e-Learning version.

Reinforcement option: OPAL
Building Winning Partnerships

**Modality:** Classroom training

The single most important skill/competency area addressed in this program is:
- Building partnerships and alliances

The secondary skills/competencies addressed in this program are:
- Building Trust
- Communication
- Building Strategic Work Relationships

**Course Description:** This course helps leaders identify their role in establishing alliances among work groups, management, customers, and suppliers. They learn to establish true partnerships to meet customer needs by developing strategies for gaining people’s commitment to working together. This program has been in existence since April 2005.

**Participant profile:** The primary audience includes Directors/VPs, Mid-level managers, Supervisors/front-line managers and High potential leaders.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-learning version)

The program design includes the following components:
- Trainer/Consultant Presentation 15%
- Discussion 15%
- Exercises/Quizzes 20%
- Case Studies 40%

**Pre-work/Post-work:** There is no pre-work. Post-work is ongoing development using tools provided in the course

**Reinforcement option:** OPAL

Coaching for Improvement

**Modality:** Classroom

Facilitating Improved Performance

**Modality:** e-Learning

The single most important skill/competency area addressed in this program is:
- Coaching Skills

The secondary skills/competency areas addressed in this program are:
- Communication Skills
- Gaining Commitment

**Course description:** This course helps leaders conduct effective improvement discussions and provide the feedback and ongoing support people need to improve performance. This program has been in existence since 1975. The Date of last significant update/revision (defined as >=30% content revision) is 09/01/2003.

**Participant profile:** The primary audience includes Mid-level managers and High potential leaders.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)
The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

Pre-work/Post-work: Pre-work is optional. There is no post-work.

E-Learning or CD-ROM: 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a learning lab.

Reinforcement option: OPAL

### Coaching for Success

Modality: Classroom training

### Preparing Others to Succeed

Modality: e-Learning

The single most important skill/competency area addressed in this program is:
- Coaching Skills

The secondary skills/competency areas addressed in this program are:
- Talent Management (Recruiting/Retaining/Developing Others)
- Gaining Commitment

Course description: This module introduces skills for guiding individuals and teams toward achieving successful results. Leaders learn how to recognize and approach each coaching opportunity as a catalyst for success - providing the spark to prompt people toward successful results. The web-based version was launched in November 2000. The classroom version of the program was newly updated in 2004.

Participant profile: The primary audience includes Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers.

Prerequisites: Core Skills for Building Commitment

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

E-Learning or CD-ROM: 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½ -3 hours in length. With the e-Learning version, live practice is encouraged through a Learning Lab. With the Electronic Performance Support for just-in time learning, Online Performance and Learning (OPAL), is used.
Delegating for Results
*Modality:* Classroom training

**Delegating for Productivity & Growth**
*Modality:* e-Learning

**The single most important skill/competency area addressed in this program is:**
- Motivating/engaging/inspiring others

**The secondary skills/competency areas addressed in this program are:**
- Coaching Skills
- Other:
  - Delegating Responsibility
  - Follow-up
  - Gaining Commitment

**Course description:** In this module, leaders learn skills for successfully matching people, responsibility, and authority to maximize involvement, productivity, motivation, and growth for individuals, groups, and the organization. These programs have been in existence since November 2000. The classroom version was newly updated in May 2005.

**Participant profile:** The primary audience includes Mid-level managers and Supervisors and/or front-line managers.

**Prerequisites:** Core Skills for Building Commitment (e-Learning version); IM: Essentials (classroom version)

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

**E-Learning or CD-ROM:** 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a learning lab.

**Reinforcement option:** OPAL

Developing Others
*Modality:* Classroom

**Guiding the Development of Others**
*Modality:* e-Learning

**The single most important skill/competency area addressed in this program is:**
- Talent Management (Recruiting/Retaining/Developing Others)

**Secondary skills/competency areas addressed in this program:**
- Coaching Skills
- Gaining Commitment

**Course description:** This module provides leaders, coaches, and mentors with the necessary skills and a practical process to develop talent. It focuses on a leader's critical role before, during, and after the development plan. The web-based version of this program was launched in November 2000. The classroom training version of the program was newly updated in 2004.
Participants profile: The primary audience includes Mid-level managers and Supervisors and/or front-line managers. The secondary audience includes Directors, VPs, Senior VPs, C-level executives and High potential leaders.

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

E-Learning format: Web or CD-ROM: 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a learning lab.

Reinforcement option: OPAL

Coaching for Improvement

Modality: Classroom training

Facilitating Improved Performance

Modality: e-Learning

The single most important skill/competency area addressed in this program is:
- Coaching Skills

The secondary skill/competency area addressed in this program is:
- Motivating/Inspiring/Engaging Others

Course Description: This module equips leaders to help people develop improvement plans, conduct effective improvement discussions, and handle the challenges they may encounter in improvement discussions. The web-based version was launched in November 2000. The classroom version of the program was newly updated in 2004.

Participants profile: The primary audience includes Directors, VPs and High potential leaders.

Prerequisites: Core Skills for Building Commitment (e-Learning version) or IM: Essentials (classroom training version)

The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

E-Learning or CD-ROM: 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours. With the e-Learning version, live practice is encouraged through a learning lab.

Reinforcement option: OPAL
Getting Started as a New Leader

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Building Relationships with Others (Trust)

**The secondary skill/competency area addressed in this program is:**
- Motivating/Inspiring Others

**Course Description:** This course provides new and potential leaders with the ability to create a strategy to accelerate their transition into their role as a leader. They will learn how to build successful working relationships with team members and how to determine priorities for their team. Participants are equipped to assess strengths and weaknesses for each of their team members and determine growth areas. This program became available in April 2005.

**Participant profile:** The primary audience includes Supervisors/front-line managers.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

**Pre-work/Post-work:** There is no pre-work. Post-work is ongoing development using tools provided in the course.

**Reinforcement option:** OPAL

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**IM Essentials**

*Modality:* Classroom

**Core Skills for Building Commitment**

*Modality:* e-Learning

**The single most important skill/competency area addressed in this program is:**
- Building Positive Relationships

**The secondary skills/competency areas addressed in this program are:**
- Communication Skills
- Gaining Commitment

**Course description:** This foundation course for all Interaction Management courses teaches leaders how to assess their evolving role and learn to build involvement through the use of feedback and effective interaction skills. They attain the tools necessary for a successful "leadership journey." Learners acquire a set of proven interaction skills, discover seven Leadership Imperatives key to meeting today's challenges, and realize their role as a catalyst leader who inspires others to act. The classroom version of this program was launched in 1975. The web-based version was launched in November 2000. The newly updated version of the classroom training became available in 2004.

**Participant profile:** The primary audience includes Supervisors and/or front-line managers. The secondary audience includes Mid-level managers.

**Prerequisites:** No, however this program is a prerequisite for many of the other IM: EX courses.
The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulations 25%

Pre-work/Post-work: Pre-work is optional. There is no post-work.

E-Learning format (Web or CD-ROM): 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-learning version, live practice is encouraged through a learning lab.

Reinforcement option: OPAL

Influential Leadership

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Building Partnerships and Alliances

The secondary skills/competency areas addressed in this program are:
- High Performing Teams
- Building Positive Relationships with Others
- Gaining Commitment

Course description: Influential Leadership helps leaders get their good ideas heard, accepted, and enacted. Leaders learn influencing strategies and how to package ideas to gain the commitment of even the most skeptical coworkers and partners. This program has been in existence since 1975 and had a significant update/revision (defined as >=30% content revision) on 09/01/2003.

Participant profile: The audience includes all management levels equally.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

Pre-work/Post-work: 15 minutes of pre-work is given. There is no post-work.

Reinforcement option: OPAL

Leading Change

Modality: Classroom training

Helping Others Adapt to Change

Modality: e-Learning

The single most important skill/competency area addressed in this program is:
- Leading/Sponsoring Change Efforts

The secondary skills/competency areas addressed in this program are:
- Coaching Skills
- Gaining Commitment
Course Description: This module focuses on the crucial role leaders have in effectively exploring change, introducing change, and helping others overcome resistance typically associated with change. Leaders learn how to conduct effective change discussions that minimize the potentially negative effects of change on morale, processes, and productivity. The web-based version was launched in November 2000. The classroom version of this program was newly updated in 2004.

Participant profile: The primary audience includes High potential leaders. The secondary audience includes Directors, VPs and Mid-level managers.

Prerequisites: Core Skills for Building Commitment (e-Learning version) or IM: Essentials (classroom version)

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

Pre-work/Post-work: There is optional pre-work and no post-work.

E-Learning (Web or CD-ROM): 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With e-Learning version: live practice is encouraged through a Learning Lab.

Reinforcement option: OPAL

Leading High-Performance Teams

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- High performing teams

The secondary skill/competency area addressed in this program is:
- Gaining commitment

Course description: This course provides team leaders with the tools and skills to perform three primary responsibilities - diagnose, coach and reinforce - that support their team’s growth. Leaders learn to diagnose behaviors and conditions that limit team performance. They are equipped to assess team strength and weakness, as well as to use coaching and reinforcing skills to be a catalyst for high performance and continuous improvement. This program became available in April 2005.

Participant profile: The primary audience includes Mid-level managers and Supervisors/front-line managers.

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

Pre-work/Post-work: There is no pre-work. Post-work is ongoing development using tools provided in the course
Managing Performance Problems
*Modality:* Classroom training

**Following Up to Support Improvement**
*Modality:* e-Learning

The single most important skill/competency area addressed in this program is:
- Coaching Skills

The secondary skills/competency areas addressed in this program are:
- Gaining Commitment
- Follow Up

**Course description:** This module emphasizes the importance of follow-up coaching for performance or work habit situations. Leaders learn to spark change in others and reinforce continued improvement. The web-based version was launched in November 2000. The classroom version of the program was newly updated in 2004.

**Participant profile:** The primary audience includes High potential leaders. The secondary audience includes Directors, VPs, and Mid-level managers.

**Prerequisites:** IM Essentials (classroom) or Core Skills for Building Commitment (e-Learning version)

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 10%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 70%

**Pre-work/Post-work:** None

**E-Learning (Web or CD-ROM):** 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a Learning Lab.

**Reinforcement option:** OPAL

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Mastering Interaction Skills
*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Building Positive Relationships with Others

The secondary skill/competency area addressed in this program is:
- Communication Skills

**Course description:** Using job-related situations, this supplement helps leaders significantly improve their confidence and mastery in using the IM leadership skills. Leaders explore the issues that they face, practice their skills, and receive feedback on their use of the interaction process skills. This program has been in existence since 1975 with a significant update/revision (defined as >=30% content revision) in 11/03/2003.

**Participant profile:** The primary audience includes High potential leaders, Mid-level managers and Supervisors and/or front-line managers.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)
The program design includes the following components:

- Trainer/Consultant Presentation  10%
- Discussion                        20%
- Exercises/Quizzes                20%
- Group Activities/Role Plays      50%

Pre-work/Post-work: Some pre-work is given. There is no post-work.
Reinforcement option: OPAL

Motivating Others
Modality: Classroom training
The single most important skill/competency area addressed in this program is:
- Motivating/Inspiring/Engaging Others

The secondary skills/competency areas addressed in this program are:
- Appreciating Diversity
- Building Trust
- Leading Through Vision and Values

Course description: In this course, leaders learn how to proactively create an environment in which people are highly motivated to perform. Participants learn the three factors that affect the motivation of employees - focused work, interpersonal support, and individual value. As a result of this course, they will be able to determine which factor(s) is "low," and emerge with both a plan of specific actions and the skills needed to build group and individual motivation. This program has been in existence since 1975 with a significant update/revision (defined as >=30% content revision) is 04/01/2004.

Participant profile: The audience includes all management levels equally.
Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

Rapid Decision Making
Modality: Classroom training
The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making

The secondary skill/competency area addressed in this program is:
- Risk Taking

Course description: This course helps leaders accelerate the decision-making process yet still make quality decisions in fast-paced environments with limited time and information. They also learn how to determine when it is appropriate to use this approach and when to slow down the process and apply a more traditional, analytical approach. This program has been in existence since 1975 with a significant update/revision (defined as >=30% content revision) in 09/01/2003.
Participant profile: The audience includes all management levels equally. A client-sponsored program is available.

Prerequisites: None

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

Pre-work/Post-work: None

Reinforcement option: OPAL

Reaching Agreement

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Problem Analysis/Solving + Strategy Thinking/Decision Making + Planning

Course description: Productivity obviously suffers when group members cannot come to agreement or have different interpretations of decisions. Without strong commitment from each member, decisions will always fall short of their goal. This course focuses on the dynamics of reaching agreement through consensus and the importance of having everyone’s commitment. It provides leaders with seven techniques for making clear, high-quality decisions that have the buy-in and commitment of every group member. This program is available as of Summer 2005.

Participant profile: The primary audience includes Mid-level managers through Frontline managers.

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

Pre-work/Post-work: There is no pre-work. Post-work is ongoing development using tools provided in the course

Reinforcement option: OPAL

Resolving Conflict

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Conflict Resolution

The secondary skills/competency areas addressed in this program are:
- Coaching Skills
- Building Positive Relationships with Others

Course description: This module enables leaders to recognize signs that conflict exists, assess each conflict situation to determine their level of involvement, and serve as a catalyst to encourage those involved in the conflict to achieve resolution. Leaders learn the skills to both provide support and act as mediators. The web-based version
was launched in November 2000. The classroom version of the program was newly updated in 2004.

**Participant profile:** The primary audience includes High potential leaders and Mid-level managers.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

**Pre-work/Post-work:** None

**E-Learning format (Web or CD-ROM):** 2-3 hours self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a learning lab. **Reinforcement option:** OPAL

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**Retaining Talent: Creating the Environment**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Talent Management (recruiting/retaining/developing others)

**The secondary skills/competency areas addressed in this program are:**
- Appreciating Diversity
- Building Trust
- Leading Through Vision and Values

**Course description:** This course helps leaders understand their critical role in retaining organizational talent. They learn to identify what it takes to keep employees happy and satisfied, and how to conduct "quick check" discussions critical for retaining valuable employees. By taking a proactive approach to retaining people, and encouraging people to openly discuss what it will take for them to stay, leaders can create an environment in which people feel valued and satisfied in their jobs. This program has been in existence since 1975 with a significant update/revision (defined as >=30% content revision) 06/07/2004.

**Participant profile:** The primary audience includes High potential leaders and Mid-level managers.

**Prerequisites:** IM Essentials (classroom version) or Core Skills for Building Commitment (e-Learning version)

**The program design includes the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

**Pre-work/Post-work:** None

**Reinforcement option:** OPAL
Reviewing Performance Progress / Progress

**Modality:** Classroom training

**Performance Planning: Reviewing Progress**

**Modality:** e-Learning

The **single most important skill/competency area addressed in this program is:**

- Performance Management: Increasing the Performance of Others

The **secondary skills/competency areas addressed in this program are:**

- Building a Successful Team
- Aligning Performance for Success

**Course description:** This module helps leaders build skills for tracking progress, providing specific, balanced feedback, and conducting review discussions. It emphasizes the leader's role of offering ongoing support, guidance, and resources while encouraging others to assume responsibility for achieving their plan. It also focuses on revisiting objectives and tracking methods if priorities change. The web-based version was launched in November 2000. The classroom version of the program was newly updated in 2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes High potential leaders.

The **program design includes the following components:**

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

**E-Learning format (Web or CD-ROM):** Includes 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length.

**Reinforcement option:** OPAL

Setting Performance Expectations

**Modality:** Classroom training

**Performance Planning: Setting Expectations**

**Modality:** e-Learning

The **single most important skill/competency area addressed in this program is:**

- Increasing Performance of Others/Performance Management

The **secondary skills/competency areas addressed in this program are:**

- High Performing Teams
- Gaining Commitment
- Work Standards

**Course Description:** This module helps leaders prepare for and conduct planning discussions, encourage continued involvement, and work with project teams or task forces on their performance plans. The web-based version was launched in November 2000. IM Essentials, the classroom version of the program, was newly updated in 2004.

**Participant profile:** The primary audience includes Mid-level managers. The secondary audience includes high potential leaders.

**Prerequisites:** Core Skills for Building Commitment (e-Learning version) or IM: Essentials (classroom training version)
The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 50%

E-Learning format (Web or CD-ROM): Includes 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length. With the e-Learning version, live practice is encouraged through a learning lab.

Reinforcement option: OPAL

Supporting Leadership Development

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Performance Management/Improving the Performance of Others

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Talent Management (Recruiting/Retaining/Developing Others)
- Continuous Learning

Course description: This course is designed specifically for the managers of leaders being trained in Interaction Management. It helps managers understand both the concepts and techniques their direct reports are learning and what they need to do to support the organization and their new leaders in this critical leadership development initiative. This program was developed in 2004.

Participant profile: The primary audience includes Directors/VPs; Senior VPs/C-level executives and High potential leaders.

Prerequisites: IM Essentials (classroom version) or Core Skills for Building Commitment (e-learning version)

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

Pre-work/Post-work: There is pre-work. Post-work is ongoing development using tools provided in the course.

Additional information: Learners are engaged in a case study examining why an organizational initiative failed and the role managers played in contributing to that failure.

Reinforcement option: OPAL
Targeted Selection

**Modality:** Classroom training and e-Learning

**The most important skills/competency areas addressed in this program are:**

- Talent Management
- Building Behavioral Interviewing Skills

**The secondary skill/competency area addressed in this program is:**

- Efficiency and effectiveness of employee selection process

**Course description:** Targeted Selection (TS) is the most proven and accurate behavior-based selection system in the world. Thousands of leading companies from every industry have used TS to build better selection systems that hire, promote, and identify top talent. A Targeted Selection system focuses the various selection phases on what really matters. TS users know how to look for what they want and can persuasively sell the organization and the opportunity to the best prospects. This program has been in existence since 1974 with its last significant update/revision (defined as >=30% content revision) in 01/03/1998.

**Participant profile:** The primary audience includes High potential leaders, Mid-level managers and Supervisors and/or front-line managers.

**Prerequisites:** No

**The program design includes the following components:**

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 20%
- Case Studies 25%
- Simulation 25%

**Duration:** 2 days

**Pre-work/Post-work:** Pre-work for TS Interviewer requires 1 hour. The pre-work for the TS Administrator involves 6-12 hours of self study and presentation preparation. There is no post-work.

**E-Learning or CD-ROM:** 2-3 hours of self-study. Companies are then encouraged to have participants participate in learning labs for live practice and application of the skills learned. These labs are specific to the web-based course and run from 1½-3 hours in length.

**Reinforcement Option:** OPAL
Duke Corporate Education, Inc.

333 Liggett Street  
Durham, NC 27701  
http://www.dukece.com

Sales contact:  
David L. Miller  
919-680-5606  
david.miller@dukece.com

Additional office location:  
Tower 3, Level 2  
Houghton Street  
London WC2A 2AE  
United Kingdom  
44-20-7955-7128

FINANCIAL PROFILE
Ownership/Funding: Privately held
Annual fiscal revenue: Because they are privately held they do not disclose financial data.

EMPLOYEE PROFILE
Total number of employees worldwide: 80
Total number of employees delivering leadership training solutions:
Based in U.S. – 50; Based Internationally – 12
Total number of certified contractors delivering leadership training solutions:
Based in U.S. – 400; Based Internationally – 100.

ORGANIZATION TENURE
Years in business: 4.5 years; Years as a leadership training vendor: 4.5 years.

CLIENT PROFILE
Number of client companies who purchased leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 44
Percentage of these client companies listed in the Fortune 500: 90%
Top competitors: (This depends on the type of work.)
1. EDA  
2. INSEAD  
3. IMD
4. Mercer
5. Monitor

Client forums/advisory boards: Duke CE has regular CLO Roundtables and also works with clients to gather data and evaluate the impact of the training in their workplaces.

COMPANY PROFILE
Leadership development philosophy: Duke CE’s work is built around the leadership philosophy and model of the client organization. It does not impose an external view on clients.

LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is just one of many methods used by Duke CE. Variability around methodology is a competitive differentiator for them.
Public Programs: There are no public, open-enrolment programs.
Client Sponsored Programs: Programs are 100% client-sponsored and each is custom designed. There are no e-Learning programs. Stand-alone leadership Training Products are not available. Blended Learning leadership programs/curricula are occasionally offered.
Executive Development Associates, Inc. (EDA)

225 Bush Street, Suite 770
San Francisco, CA  94104
415-399-9797
http://www.executivedevelopment.com

Sales contact information:
Jory Des Jardins
415-399-9797
jdesjardins@executivedevelopment.com

Additional office locations:
230 Park Avenue, 10th Floor
NY, NY  10169
212-551-3617
212-808-3020 (fax)

EMPLEE PROFILE
Total number of employees worldwide:  12
Total number of employees delivering leadership training solutions:
Based in U.S – 3
Total number of certified contractors delivering your leadership training solutions:
Based in U.S. – 6; Based Internationally - 1
Minimum qualifications for trainers/consultants (whether employees or
contractors) who deliver leadership training solutions:  EDA engages senior staff
and senior consultants on an individual basis--there is no criteria from which they decide
who will be on the EDA team. However, all senior consultants have outstanding records
from senior-level executive development positions held in the corporate arena, or
outstanding teaching background at a major university. Consultants average 10-20 years
of prior experience; all have a Master's or Ph.D. in or related to their specialty.

ORGANIZATION TENURE
Years in business:  20+; Years as a leadership training vendor:  20+

CLIENT PROFILE
Number of client companies who purchased leadership training solutions in the
last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.):  
14
Percentage of these client companies listed in the Fortune 500:  75%
Top 5 client companies:  Top competitors:
  1. Dell                  1. Duke Corporate Education
  3. Weyerhaeuser         Center (formerly CDR)
  4. UBS                  3. CCL
  5. Texas Instruments

Customer Service infrastructure/philosophy:  EDA exists to ensure their client’s
executive talent is a source of competitive advantage by: creating high-impact, custom-
designed executive education strategies, systems and programs; developing customized
talent management strategies and systems; supporting the success and effectiveness of
executives through powerful community of practice networks; conducting research that
advances the state of the art, and is also practical and immediately applicable.

Client forums/advisory boards:  EDA has a Blue-Ribbon advisory board of senior
most Executive Development, HR, and academic advisors that meet regularly. They get
client feedback through their networks, or "communities of practice," consisting of heads
of Executive Development, Learning, Global HR, and Talent Management, who meet in
person twice per year per network. Nearly 100 major corporations are represented from
manufacturing, retail, technology, healthcare, pharmaceuticals and finance. While these communities of practice meet to discuss their own specific issues, the firm gets a strong indication of corporate issues by facilitating these forums.

**Organization's investment in R&D as a percentage of leadership sales revenue:** 6-10%.

**COMPANY PROFILE**

**Organization's leadership development philosophy:** The focus is on the strategic use of executive development. Their comprehensive, proven, 5-step consulting process ensures that everything they do helps address specific marketplace challenges, directly contributes to achieving vision and strategy, and results in measurable improvements in leadership effectiveness and business performance. Their Rapid-Cycle Design® process accelerates the time to market for new executive/leadership talent/development strategies, systems and programs, and ensures line engagement and ownership.

**High performance requires Strategic Unity (SM) and it exists when:**

1. There are clear, compelling vision, values and strategies understood and committed to throughout the organization
2. Business units, teams and individuals have aligned goals and actions
3. People are equipped with the capabilities (mindsets, knowledge & skills) required to achieve the vision, live the values, and execute the strategies.

Custom-designed strategies and programs significantly increase the degree of strategic unity.

**Action learning:** EDA believes that executives learn best when working on real business challenges so that there is immediate application of what is learned to important business issues. Therefore, designs often include teams working on current business opportunities or problems to both improve business performance and develop the participants.

**Three-Dimensional Learning Framework:** The challenges facing our organizations are complex and require the full development of an executive’s capabilities. Executive development should result in fully developed, three-dimensional executives. The executive learning framework develops:

1. Capacity to identify and address the major business challenges facing the organization
2. Strong leadership skills
3. Personal effectiveness skills necessary to achieve and sustain excellence.

**The three aspects of a leadership program design that are most important to its success and effectiveness are:**

1. Build unity and alignment around strategy. Develop the executive capabilities needed to successfully and rapidly implement strategy.
2. Build bench strength by accelerating the development of your pool of “high potential” talent.
3. Identify and address critical marketplace/business challenges. Develop the mindsets, knowledge and skills needed to address those challenges.

**LEADERSHIP TRAINING DELIVERY METHODS**

Blended learning leadership programs/curricula are offered. EDA works with its affiliate partners to create executive/leadership development programs, processes and systems. These are often blended solutions, including Action Learning, Business Simulations, classroom and online programs.
Additional information or comments: EDA supports the growth and success of learning and executive development professionals, and other senior executives through consulting and the following: STRATEGIC EXECUTIVE DEVELOPMENT WORKSHOP (SEDW): SEDW is a powerful, 3 ½-day workshop where participants learn how to create high-impact executive development strategies, systems and programs linked to their marketplace challenges and business strategy. EXECUTIVE NETWORKS: EDA convenes communities of practice that provide the invaluable opportunity to develop strong peer relationships supporting members’ growth and success. In these highly effective forums, members share best/innovative practices, leading edge thinking and improve the effectiveness and impact of their efforts. Networks exist for senior executive and leadership development and talent management professionals, CLOs and strategy officers. RESEARCH: EDA conducts surveys and research on trends and best practices aimed at serving the needs of their Network members; guided by an advisory board comprised of members. The focus is on fast-cycle research with rapid time-to-application.
FranklinCovey Co.

2200 West Parkway Boulevard
Salt Lake City, Utah 84119
801-817-1776
http://www.franklincovey.com

Additional office locations continued:
1787 Sentry Parkway West, Bldg. 16
Suite 210
Blue Bell, PA 19422
215-274-9321

Additional office locations:
8001 Irvine Center Drive, Suite 880
Irvine, CA 92618
1-800-877-1740

One Parkway North, Suite 575
Deerfield, IL 60015
847-374-2007

15303 Dallas Parkway, Suite 640
Addison, TX 75001
972-774-8094

Multiple international offices

FINANCIAL PROFILE
Ownership/Funding: Public company, NYSE: FC, For-profit
Mergers/Partnership/Formal Alliance Activity (over the last 24 months): Agilix; Software partnership to develop tools.
Annual fiscal revenue: 2 Years Ago - $75 million+; Last Fiscal Year - $75 million+
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching): 2 Years Ago - $50 million+; Last Fiscal Year - $50 million+
Percentage of revenue from leadership offerings delivered outside the U.S.: 26%+
Profitability based on last fiscal year: Operating at a net loss

EMPLOYEE PROFILE
Total number of employees worldwide: 1,600
Total number of employees delivering leadership training solutions:
Based in U.S. - 50; Based Internationally - 30
Total number of certified contractors delivering leadership training solutions:
Based in U.S. - 25; Based Internationally - 15
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions:
Five years’ training experience. Three to five years’ business experience. College graduate. Excellent presentation skills. Strong consulting skills. Willing to travel. Responsible for administrative side of their training. Ability to customize curriculum to meet customer needs. Ability to work at the executive level. Technical skills which include projectors and computers. Working knowledge of software scheduling programs.
Total number of developers of leadership training solutions: 20

ORGANIZATION TENURE
Years in business: 15 - 19 years; Years as a leadership training vendor: 20 years+

CLIENT PROFILE
Percentage of client companies listed in the Fortune 500: 75%
Top competitors:
  1. DDI
  2. Ken Blanchard
  3. Center for Creative Leadership

Customer service infrastructure/philosophy: FranklinCovey has a team of Client Service Coordinators who are aligned to work with their corporate clients nationally. They are committed to providing a high-level of customer service through one-on-one client relationships. They also have checklists and measures to ensure and evaluate the level of service they provide.

FranklinCovey has an advisory board made up of 427 client facilitators who teach a proportional mix of their curriculum. This advisory board is reestablished every July with fresh participants. The board members participate in Symposia, with presidential receptions, and in online surveys asking for continual feedback on products and certification process to ensure better tools and training.

FranklinCovey’s xQ process gauges how well client organizations focus on key priorities, providing direction for improvement. xQ provides overall and unit reports that enable clients to pinpoint areas of concern within their organization. With these tools, they will be able to more effectively implement solutions and overcome specific execution challenges. FranklinCovey administers a vast amount of these surveys each year.

COMPANY PROFILE
Organization’s investment in R&D as a percentage of their leadership sales revenue: 21%+. Leadership Development Philosophy: FranklinCovey develops leaders with character who can execute on top priorities and who people want to follow. Leadership is built on character from the inside out. FranklinCovey believes the role of the leader is to unleash the talent and passion of people.

The three aspects of a leadership program design that are most important to its success and effectiveness are:
  1. Based on timeless, self-evident principles. This aspect is imbedded using profiles, training, and reinforcement.
  2. Combination of learning, tools and measures.
  3. Engages both the head (intellect) and heart (emotions). This aspect is embedded by focusing on key leadership qualities and establishing an execution process.

LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is offered. There were four public, open enrollment programs, five client-sponsored programs and multiple distinct custom-designed programs conducted last year. E-Learning programs are offered. There is currently one e-Learning leadership program offered to clients. Stand-alone leadership Training Products are offered; there are currently three distinct products. Blended learning programs are custom built for clients using all aspects of their leadership training and products.

STANDARD INFORMATION FOR ALL TRAINING SOLUTIONS
Languages in which the client-sponsored program is currently offered: U.S. English, U.K. English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese - Mandarin, Chinese – Cantonese, Portuguese, Thai
Countries in which this client-sponsored program is currently offered: Australia, Brazil, Canada, Japan, Mexico, UK/Ireland, Argentina, Bermuda, Columbia, Panama, Puerto Rico, Uruguay, West Indies, Indonesia, Malaysia, Philippines, Thailand, Korea,
Principle-Centered Leadership Week

Modality: Classroom training

The single most important skill/competency area addressed in this program:
- Motivating/Inspiring/Engaging Others

Secondary skills/competency areas addressed in this program:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Thinking Globally

Course description: Effective leaders practice Principle-Centered Leadership at four levels: personal, interpersonal, managerial, and organizational. During Leadership Week, you will examine every aspect of your life: your understanding of yourself, the direction of your organization, how you balance home and work, and how you lead your employees. Attending Leadership Week enables you to: Build a high performance, high-trust culture; Identify desired results and unify your teams to achieve those results; Renew your leadership role and gain a better understanding of its impact on your organization. This program has been in existence for 20 years.

Participant profile: The primary audience includes Directors, VPs, Senior VPs and C-level executives. The secondary audience includes Supervisors and/or front-line managers, Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education

PUBLIC & CLIENT-SPONSORED PROGRAMS
Both a public program and a client-sponsored version are available.
Pre-requisites: There are no pre-requisites for the public program or the client-sponsored program.

Top 3 competitive offerings by program name and vendor:
1. Business School Executive Education, Various Universities
2. Week long leadership programs, Center for Creative Leadership

Different client leadership models and/or other client-specific needs: They will tailor the program to the needs of the client.

Pre-assessments: Leadership Profile allows participant to get information from six of their peers, their manager and family members.

Delivery options: Trainers/consultants deliver the program; co-facilitation with client trainers is available; train-the-trainer programs and program licensing is not available.

Duration of client-sponsored program: Five days.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Exercises/Quizzes 20%
- Discussion 20%
- Group Activities/Role Plays 20%

Pre-work/Post-work: Pre-work gives a foundational understanding of the four roles. Requests that participants identify an initiative they want to address from their professional life. It must be important to the organization; it has to be something they can influence, that they are accountable for, it has to be done but not yet done, they have to be passionate about it, and it has to be important to the organization. This pre-work is accomplished on planner pages that they can insert into the provided binder. For post-work clients submit a 21-day letter and follow up on the pre-work.

Standard materials provided with program: Participant Manual, Job Aids, Pre-Assessment Profile, Learning Journal

Optional materials available: Audio Tapes, Books

Reinforcement/Follow-up options: Coaching from Client Partner, 21-day Letter

Standard way to measure program effectiveness and individual behavior change: Post-Assessment

Other measurement options offered: xQ Process

Languages in which this program is currently offered: US English, UK English, Spanish, and Japanese.

Countries in which this program is currently offered: Australia, Brazil, Canada, Japan, Mexico, UK/Ireland, Argentina, Bermuda, Columbia, Panama, Puerto Rico, Uruguay, West Indies, Indonesia, Malaysia, Philippines, Thailand, Korea, Singapore, Taiwan, China, Belgium, Holland, Luxembourg, Poland, Estonia, Hungary, France, Egypt, Spain, Italy, Portugal, Germany, Austria, Switzerland, Greece, India, Israel, Lebanon, Nigeria, Finland, Norway, Sweden, Saudi Arabia, South Africa, Russia, Turkey, UAE
The 4 Disciplines of Execution

*Modality:* Classroom training

The single most important skill/competency area addressed in this program:
- Identifying and executing on your team's top goals.

Secondary skills/competency areas addressed in this program:
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Leading/Sponsoring Change Efforts
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
- Thinking Globally
- Strategy Implementation
- Accountability Systems

Course description: The 4 Disciplines of Execution workshop provides four clear disciplines that ensure focus and execution on the organization's top priorities. When the workshop is deployed at every level within an organization, performance of individuals, teams and the organization increases. Leaders and team members are clear on the organization's top priorities and share a framework of accountability to achieve the goals. This program has been in existence for two years. The date of last significant update/revision (defined as >=30% content revision) is 02/01/2004.

Formal third party recognition and/or awards: It has been awarded three Telly Awards.

Participant profile: All management levels equally.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education

Public & Client-Sponsored Programs: A one-day public program is available. A client-sponsored program is available.

Pre-requisites: There are no pre-requisites for the public program or for client-sponsored programs.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%

Standard materials provided with program: Participant Manual, Job Aids including resource CD

Optional materials available and associated costs: Audio Tapes, Books

Reinforcement/Follow-up options and associated costs: Maximizer, xQ Debrief, 21-Day Letter

Standard way to measure program effectiveness and individual behavior change: Every participant receives a personal follow up telephone call from a FranklinCovey associate.

Other measurement options offered: xQ Process
Languages in which this public program is currently offered:  US English, UK English, Spanish and Japanese.

Different client leadership models and/or other client-specific needs: Franklin Covey will modify this program to meet the needs of clients.

Pre-assessments:  xQ Process can be deployed as a census survey for an organization

Delivery options:  Trainers/consultants deliver the program; co-facilitation with client trainers is available; as are train-the-trainer programs and program licensing.

Trainers/consultants delivered program:  Maximum number of participants - unlimited; Number of trainers/consultants required – 1.

Co-facilitation with client trainers:  Maximum number of participants – unlimited; Number of trainers/consultants required – 1.

Train-the-trainer programs and program licensing:  Duration - 2 days; Maximum number of participants – 24; Number of trainers/consultants required – 1.

Duration of client-sponsored program:  1 day

The program design includes the following components:

- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%

Pre-work/ Post-work:  There is no pre-work involved.  For post-work clients submit a 21-day letter.

Standard materials provided with program:  Participant Manual, Job Aids including resource CD

Optional materials available:  Audio Tapes, Books

Reinforcement/Follow-up options:  Maximizer, xQ Debrief, 21-Day Letter

Standard way to measure program effectiveness and individual behavior change:  Post-Assessment, xQ Debrief.

Other measurement options offered:  xQ Process.

Top competitive offerings by program name and vendor:  University Executive Education Programs on Organizational Goal Setting, by various universities

The 4 Roles of Leadership

Modality:  Classroom training

The single most important skill/competency area addressed in this program:

- Motivating/Inspiring/Engaging Others.

Secondary skills/competency areas addressed in this program:

- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Coaching Skills
- High Performing Teams
- Leading/Sponsoring Change Efforts
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

Course description:  The 4 Roles of Leadership workshop helps managers identify and develop the four critical abilities of true leaders (Pathfinding, Aligning, Empowering, and Modeling) to navigate turbulence effectively. They learn how to implement those roles practically and with long-term results - without taking their eye off their day-to-day management needs. This program has been in existence for nine years. The date of last significant update/revision (defined as >=30% content revision) is 06/01/1996.
Formal third party recognition and/or awards: Many components have received awards including Telly Awards for outstanding videos.

Participant profile: The primary audience includes Mid-level managers. Secondary audiences include High potential leaders, Directors, VPs - 0-24%, and Senior VPs, C-level executives.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education

Public & Client-Sponsored Programs: A two-day public program is available and client-sponsored programs are available.

Pre-requisites: There are no pre-requisites for the public program or the client-sponsored programs.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%

Pre-work/Post-work: Attendees receive a copy of the book, Principle-Centered Leadership. The pre-work gives a foundational understanding of the 4 Roles of Leadership. Requests that participants identify an initiative they want to address from their professional life. It must be important to the organization, it has to be something they can influence, that they are accountable for, it has to be done but not yet done, they have to be passionate about it, and it has to be important to the organization. This pre-work is accomplished on planner pages that they can insert into the provided binder. Recipients complete a 21-day letter for their post-work.

Standard materials provided with program: Participant Manual, Job Aids, Pre-Assessment Profile, Learning Journal

Optional materials available: Audio Tapes, Books, PlanPlus Software

Reinforcement/Follow-up options: Post-Assessment, 21-day Letter

Standard way to measure program effectiveness and individual behavior change: Every participant receives a personal follow up telephone call from a FranklinCovey associate. They are also asked to submit a 21-day letter describing the effectiveness the program has had in their lives.

Other measurement options offered: xQ Process, Leadership Profile

Languages in which this public program is currently offered: US English, UK English, Spanish and Japanese.

Customization: Complete Custom Design is available. FranklinCovey can customize the program based on the client's needs.

Pre-assessments: Leadership Profile allows participant to get information from 6 of their peers, their manager and family members.

Delivery options: Trainers/consultants deliver the program; co-facilitation with client trainers is available, as well as train-the-trainer programs and program licensing.

Trainers/consultants delivered program: Maximum number of participants – unlimited; Number of trainers/consultants required – 1.

Co-facilitation with client trainers: Maximum number of participants – unlimited; number of trainers/consultants required – 1.

Train-the-trainer programs and program licensing: Duration - 4 days; Maximum number of participants – 24; Number of trainers/consultants required – 1.
Pre-requisites: There are no pre-requisites for client-sponsored programs.

Duration of client-sponsored program: 2 days.

The program design includes the following components:

- Trainer/Consultant Presentation 40%
- Exercises/Quizzes 20%
- Discussion 20%
- Group Activities/Role Plays 20%

Pre-work/Post-work: Attendees receive a copy of the book, Principle-Centered Leadership. The pre-work gives a foundational understanding of the 4 Roles. Requests that participants identify an initiative they want to address from their professional life. It must be important to the organization, it has to be something they can influence, that they are accountable for, it has to be done but not yet done, they have to be passionate about it, and it has to be important to the organization. This pre-work is accomplished on planner pages that they can insert into the provided binder. For post-work attendees complete a 21-day letter.

Standard materials provided with program: Participant Manual, Job Aids, Pre-Assessment Profile, FranklinCovey Planning System, Learning Journal

Optional materials available: Audio Tapes, Books, PlanPlus Software

Reinforcement/Follow-up options: Post-Assessment, 21-day Letter

Standard way to measure program effectiveness and individual behavior change: This is done through a post-assessment and the 21-day letter.

Other measurement options offered: xQ Process, Leadership Profile

Languages in which this client-sponsored program is currently offered: US English, UK English, Spanish, Italian, German, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese, Portuguese, Polish

Countries in which this program is currently offered: Australia, Brazil, Canada, Japan, Mexico, UK/Ireland, Argentina, Bermuda, Columbia, Panama, Puerto Rico, Uruguay, West Indies, Indonesia, Malaysia, Philippines, Thailand, Korea, Singapore, Taiwan, China, Belgium, Holland, Luxembourg, Poland, Estonia, Hungary, France, Egypt, Spain, Italy, Portugal, Germany, Austria, Switzerland, Greece, India, Israel, Lebanon, Nigeria, Finland, Norway, Sweden, Saudi Arabia, South Africa, Russia, Turkey, UAE

Top 3 competitive offerings by program name and vendor:
1. Situational Leadership, by Ken Blanchard
2. Competitive Analysis/Leadership, by DDI
3. Various Leadership Courses, by Center for Creative Leadership

The 7 Habits of Highly Effective People

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Creativity and Innovation
Dealing with Ambiguity
Increasing Performance of Others/Performance Management

Course description: Based on the best-selling business book by the same name, this three-day workshop experience provides the foundation to strengthen the human side of performance at the personal, managerial, and organizational levels. The 7 Habits course equips employees with the tools and skills to work at the highest levels of effectiveness, both with and through others. The course helps build stronger organizations by strengthening and exercising the character and competence of the individuals within them. This program has been in existence for 20 years. The date of last significant update/revision (defined as >=30% content revision) is 01/01/2005.

Formal third party recognition and/or awards: Many components have received awards including Telly Awards for outstanding videos.

Participant profile: The audience includes all levels of management equally.

Most common industries represented by clients:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education

Public Program: A three-day public program is available.

Prerequisites: No

The program design includes the following components:

- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%

Pre-work/Post-work: All participants take a 360-degree profile, a 7 Habits Book and 7 Habits Audio CD set. Participants are asked to review foundational principles in the 7 Habits and to share thoughts on the following 6 questions: 1) What habits do you currently practice in your life? 2) What values are important to you 3) What leadership traits do you admire? 4) Think of a significant person and a professional challenge to reflect upon during the workshop. 5) Identify a personal and professional relationship they can improve during the workshop. 6) What do you want to accomplish during the workshop? Clients submit a 21-day letter and follow up on the pre-work.

Standard materials provided with program: Participant Manual, Job Aids, Pre-Assessment Profile, Franklin Planning System, Learning Journal, The 7 Habits of Highly Effective People book and audio CD set. The 7 Habits Self-Awareness Profile to complete before the workshop that helps you see where you stand in relation to each of the 7 habits and gives you a baseline from which to start the process of lasting improvement. The 7 Habits Participant Manual filled with examples and thought-provoking exercise to experience during the workshop. The Franklin Planner Starter Kit with planning pages and binder so you implement what you learn at the workshop into your daily life.


Reinforcement/Follow-up options and associated costs: Post-Assessment, Rapid Performance Modules, 21-day Letter, 7 Habits Online

Standard way to measure program effectiveness and individual behavior change: Every participant receives a personal follow-up telephone call from a FranklinCovey
associate. They are also asked to submit a 21-day letter describing the effectiveness the program has had in their lives.

**Other measurement options offered at additional cost:** xQ Process, 360-degree Profile

**Languages in which this public program is currently offered:** U.S. English, U.K. English, Spanish, Japanese

**Top three competitive offerings by program name and vendor:**
1. Situational Leadership, by Ken Blanchard
2. Competitive Analysis/Leadership, by DDI
3. Various Leadership Offerings, by Center for Creative Leadership

**Client-Sponsored Program:** A client-sponsored program is available.

**Customization:** Complete custom design is available through the custom development department, which will customize the program to teach to the client's needs.

**Pre-assessments:** Available to participants. They allow participants to get information from six of their peers, their manager and family members.

**Delivery options provided:** Trainers/consultants deliver program, co-facilitation with client trainers; train-the-trainer programs and program licensing are also available.

**Trainers/consultants-led program:** Unlimited number of participants; one trainer/consultant is required.

**Co-facilitation with client trainers:** Unlimited number of participants; one trainer/consultant is required.

Train-the-trainer programs and program licensing; program runs 4-5 days; maximum number of participants is 24; and one trainer/consultant is required.

**Prerequisites:** No

**Duration:** 2½ days

**The program design includes the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%

**Pre-work/Post-work:** Participants review foundational principles in the 7 Habits and ask participants to share thoughts on the following 6 questions: 1) What habits do you currently practice in your life? 2) What values are important to you? 3) What leadership traits do you admire? 4) Think of a significant person and a professional challenge to reflect upon during the workshop. 5) Identify a personal and professional relationship they can improve during the workshop. 6) What do you want to accomplish during the workshop? Clients submit a 21-day letter and follow up on the pre-work.

**Standard materials provided with program:** Participant Manual, Job Aids, Pre-Assessment Profile, FranklinCovey Planning System, and Learning Journal

**Optional materials available:** Audio Tapes, Books, Rapid Performance Module, and PlanPlus Software

**Reinforcement/Follow-up options:** Post-Assessment, Rapid Performance Modules, 21-day Letter, 7 Habits Online

**Standard way to measure program effectiveness and individual behavior change:** Post-Assessment.

**Measurement options offered:** xQ Process and 360-degree Profile

**Languages in which the client-sponsored program is currently offered:** U.S. English, U.K. English, Spanish, French, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese, Portuguese, Polish
Countries in which this client-sponsored program is currently offered: Australia, Brazil, Canada, Japan, Mexico, UK/Ireland, Argentina, Bermuda, Columbia, Panama, Puerto Rico, Uruguay, West Indies, Indonesia, Malaysia, Philippines, Thailand, Korea, Singapore, Taiwan, China, Belgium, Holland, Luxembourg, Poland, Estonia, Hungary, France, Egypt, Spain, Italy, Portugal, Germany, Austria, Switzerland, Greece, India, Israel, Lebanon, Nigeria, Finland, Norway, Sweden, Saudi Arabia, South Africa, Russia, Turkey, UAE

The 7 Habits of Highly Effective People – Online Edition

Modality: e-Learning

The single most important skill/competency area addressed in this product is:
• Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this product are:
• Setting and Achieving Goals
• Time/Project Management
• Motivating/Inspiring/Engaging Others
• Conflict Resolution
• Communication Skills
• Building Positive Relationships with Others
• Appreciating Diversity
• Creativity and Innovation
• Dealing with Ambiguity
• Increasing Performance of Others/Performance Management

Course description: Based on the best-selling business book by the same name, this online workshop experience provides the foundation to strengthen the human side of performance at the personal, managerial, and organizational levels. The 7 Habits course equips employees with the tools and skills to work at the highest levels of effectiveness, both with and through others. The course helps build stronger organizations by strengthening and exercising the character and competence of the individuals within them. This program is: CD-ROM and asynchronous (self-paced). This program has been in existence for two years.

Participant profile: The audience includes all levels of management equally.

Most common industries represented by clients purchasing this product:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Utilities
• Education

Customization: There is no complete custom design or limited customization available.

Pre-assessments: All participants take a 360-degree profile.

Prerequisites: No

There are 9 modules, 8-10 minutes per lesson; over 60 total lessons.

Total course time: 9-10 hours
Section III – Program Files
Franklin Covey Co.

The % of each instructional technique for this program:
- Audio 40-59%
- Video 20-39%
- Static Pages >60%
- Simulations <20%
- Scenarios <20%
- Quizzes >60%

Pre-work/Post-work: None
Standard materials provided with program: 360-degree profile and e-Coaching.
Optional materials available: Books, tapes
Reinforcement/Follow-up options: Books, tapes
Languages in which this program is currently offered: U.S. English.
Help Desk Support: Monday – Friday, 8:00 am - 5:00 pm EST; Available in English; Outsourced

MINIMUM TECHNOLOGY REQUIREMENTS
Operating systems on which this program is compatible: Windows 98; Windows; 2000; Windows NT; Windows ME; Windows XP
Required Plug-ins: Flash; Microsoft Word or other word processor
Minimum Bandwidth: Cable
Browsers on which this program is compatible: IE Explorer 5x; Netscape 6x
Compatible/Compliant: SCORM compatible; AICC compatible; Section 508 Compliant
Learning Management System(s) that have been tested and are compatible with this program: Saba, Digital Think L5

The 7 Habits of Highly Effective People
Modality: Training product
The single most important skill/competency area addressed in this product is:
- Assessing/Developing Your Personal Leadership Skills/Style
The secondary skills/competency areas addressed in this product are:
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
Description of product/material: Workbook (or set); Book (or set); Audiotape (or set)
Benefits and unique qualities of this product: In The 7 Habits of Highly Effective People, author Stephen R. Covey presents a holistic, integrated, principle-centered approach for solving personal and professional problems. With penetrating insights and pointed anecdotes, Covey reveals a step-by-step pathway for living with fairness, integrity, honesty, and human dignity -- principles that give us the security to adapt to change and the wisdom and power to take advantage of the opportunities that change creates. This product has been in existence since 1989. The date of last significant update/revision (defined as >=30% content revision) is 11/09/2004.
Formal third party recognition and/or awards: Number One New York Times Bestseller; Over 15 Million Copies in Print; Best Selling Business Book of All Time
User profile: The user profile includes all management levels equally.

Most common industries represented by clients purchasing this product:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality

Pre-work/Post-work: None

Instructional techniques: 100% user reading

Languages in which this product is currently offered: U.S. English, U.K. English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese, Portuguese, Polish

The 8th Habit: From Effectiveness to Greatness

Modality: Training product

The single most important skill/competency area addressed in this product:
- Motivating/Inspiring/Engaging Others.

The secondary skills/competency areas addressed in this product:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Thinking Globally

Description of product/material: Book (or set); Audiotape (or set)

Being effective as individuals and organizations is no longer merely an option -- survival in today's world requires it. But in order to thrive, innovate, excel, and lead in what Covey calls the new Knowledge Worker Age, we must build on and move beyond effectiveness. The call of this new era in human history is for greatness; it's for fulfillment, passionate execution, and significant contribution. Accessing the higher levels of human genius and motivation in today's new reality requires a sea change in thinking: a new mind-set, a new skill-set, a new tool-set -- in short, a whole new habit. The crucial challenge of our world today is this: to find our voice and inspire others to find theirs. It is what Covey calls the 8th Habit. This product has been in existence since 11/09/2004.

Formal third party recognition and/or awards: This product has received multiple endorsements from many major thoughts leaders, business executives and world leaders.

User profile: All management levels equally
Most common industries represented by clients purchasing this product:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education

Instructional techniques: Personal Reading and 16 video clips in attached DVD
Languages in which this product is currently offered: US English, UK English, Spanish, Dutch, Korean, Japanese, Chinese – Mandarin, Portuguese, and Polish.

**xQ Process**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program:**
- Diagnosing team and organization execution ability.

**The secondary skills/competency areas addressed in this program:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Thinking Globally

**Course description:** The xQ (Execution Quotient) service from FranklinCovey gauges how well your organization focuses on key priorities, providing direction for improvement. xQ provides overall and unit reports that enable you to pinpoint areas of concern within your organization. With these tools, you will be able to more effectively implement solutions and overcome specific execution challenges. This program has been in existence for two years. The date of last significant update/revision (defined as >=30% content revision) is 01/01/2005.

**Participant profile:** The primary audience includes Directors and VPs. The secondary audience includes Senior VPs, C-level executives, High potential leaders, Mid-level managers and Supervisors and/or front-line managers.
Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public & Client-Sponsored Programs: A public program is not available. A client-sponsored program is available.

Customization: Complete custom design is not available. Limited customization is available. After the standard xQ questions, clients can customize their own questions.

Delivery options: Trainers/consultants deliver the program; co-facilitation with client trainers, train-the-trainer programs and program licensing are available.

Costs and maximum number of participants vary based on the program. Number of trainers/consultants required: 1.

Train-the-trainer programs and program licensing:

Duration: 2 days

Maximum number of participants: 24

Number of trainers/consultants required: 1

Pre-requisites: There are no pre-requisites for the client-sponsored program.

Duration: Client-sponsored program is 1/2 day.

The program design includes the following components:
- Trainer/Consultant Presentation 25%
- Discussion 75%

Pre-work/Post-work: For pre-work leaders are required to bring in their recommended goals and measures for their team. For post-work the leader and each manager are required to identify their top three goals and build scoreboards for each.

Standard materials provided with program: Workbook, access to online tool

Reinforcement/Follow-up options: Training to help augment their scores.

Standard way to measure program effectiveness and individual behavior change: It is recommended that the xQ survey be taken every 6 months to measure improvement in the 6 key drivers of execution.

Languages in which the client-sponsored program is currently offered: US English, UK English, Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese, Portuguese, and Thai

Countries in which this client-sponsored program is currently offered: Australia, Brazil, Canada, China, Columbia, Panama, Puerto Rico, Uruguay, West Indies, Indonesia, Malaysia, Philippines, Thailand, Korea, Singapore, Taiwan, China, Belgium, Holland, Luxembourg, Poland, Estonia, Hungary, France, Egypt, Spain, Italy, Portugal, Germany, Austria, Switzerland, Greece, India, Israel, Lebanon, Nigeria, Finland, Norway, Sweden, Saudi Arabia, South Africa, Russia, Turkey, UAE

Top 3 competitive offerings by program name and vendor:
- Q12, by Gallup Organization
- Internal organizational assessment tools, various - many organizations develop their own
The Gallup Organization

1001 Gallup Drive
Omaha, NE 68102
402-951-2003
http://www.gallup.com
http://www.gallup.com/university

Additional office locations continued:
Drapers Court, Kingston Hall Road
Kingston-Upon-Thames, Surrey UK
KT1 2 BG
011-44-20-8939-7000

Additional office locations:
18191 Von Karman Avenue
Irvine, California 92612
949-474-7900

Sales contact:
Joy Plemmons
202-715-3071
joy_plemmons@gallup.com

FINANCIAL PROFILE
Ownership/Funding: Privately-held, for-profit
Mergers/Partnership/Formal Alliance Activity: No activity in the past 24 months
Annual fiscal revenue: 2 Years Ago: $75 million +; Last Fiscal Year: $75 million +
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago: $0-9 million; Last Fiscal Year: $0-9 million
Profitability based on last fiscal year: GAAP profitable; EBITDA profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 2,000
Total number of employees delivering leadership training solutions:
Based in U.S - 80; Based Internationally - 20
Total number of certified contractors delivering leadership training solutions:
Based in U.S - 0; Based Internationally - 0
Total number of developers of leadership training solutions: 20
Years in business/Years as a leadership-training vendor: 20+

COMPANY PROFILE
Gallup utilizes the Kirkpatrick four-level model of evaluation to assess program effectiveness. Level 1 and 2 Evaluations of participant’s reaction and initial learning are an integral part of each classroom and e-learning course. Upon completion of the program, all participants are asked to evaluate the course using a standard evaluation form. Participants are also quizzed and tested during the program to assess the initial learning results. Level 3: In-depth biographical information on the participants as well as pre-test questions is used to get an understanding of the individuals in the classroom and their level of competence. Post-program questions are measured at the 3-month mark through an automatic email system, helping to understand the level of application. Gallup also conducts longitudinal studies on applications within certain practice areas of learning. As the integration continues over 3, 5 and even 10 years, there is continual measurement. Six months following program participation, Gallup University contacts each learner to review their level of integration of the learning into their day-to-day lives as well as their work environment. Gallup offers further support in helping them transfer the information back to their job. This serves to maximize the momentum and energy generated during the program and provides participants with the opportunity to discuss their progress. Level 4 - Gallup’s continual measurement from the original baseline to ongoing measurement is analyzed to help organizational leaders see the business impact of the program. The impact of program participation on the organization’s business is assessed using the organization’s pre-existing performance metrics as well.
as Gallup’s performance management tools and measures. Gallup's investment in R&D as a percentage of their leadership sales revenue is 6-10%.

Leadership Development Philosophy: Gallup University's approach to developing leaders is founded on the belief that individuals lead most effectively when they discover, understand, and apply their unique talents. Gallup's integrated programs provide executives with the knowledge and tools they need to successfully meet leadership challenges, become effective leaders, and embark on a life-long leadership development experience.

Leadership Training Delivery Methods
Classroom training is offered. There are three public, open enrollment programs. There were 10 distinct custom-designed programs conducted last year. There are 25 distinct e-Learning programs offered. There are no stand-alone leadership training products offered. There are 10 distinct blended learning leadership programs/curricula offered. Blended learning represented 75 – 100% of its leadership revenue during the last fiscal year.

Standard Information for All Leadership Training
Languages/Countries in which training solutions are currently offered: The programs are currently offered in U.S. English and U.K. English in both the United States and United Kingdom.

Customization: There is limited customization for client-specific needs - clients have some leeway in determining which of the standard and optional components of the program they would like to incorporate.

Pre-assessments: Gallup’s web-based assessment called StrengthsFinder provides leaders with insights into their greatest areas of talent. Also, students of this class will have an employee engagement survey, the Q12, taken of their direct reports. The Q12 results reveal how the leader's management style influences team members' perceptions and employee engagement. Both of these components are included in the cost of the program.

Optional materials available at additional cost:
- Executive and Management Strengths Consulting (1 hour with a Gallup Consultant)
- Associate Strengths Consulting (1 hour with Gallup Consultant)
- Executive Strategy Sessions (Strategy for managing and improving workplace engagement)
- Executive Q12 Consulting
- Strengths Performance Coaching (Strengths Performance Coaching - participants must be program graduates)
- Internal Best Practices Discovery
- Optional Gallup Materials Book: First, Break All the Rules, Now, Discover Your Strengths, Audiotape -- First, Break All the Rules, Soar With Your Strengths

The standard way to measure program effectiveness and individual behavior change is as follows: Upon completion of the program, all participants are asked to evaluate the course using a standard evaluation form. Participants are also quizzed and tested during the program to assess the initial learning results. In-depth biographical information on the participants and pre-test questions are used to get an understanding of the individuals in the classroom and their level of competence. Post-program questions are measured at the three-month mark through an automatic email system, helping to understand the level of application. Six months following program participation, Gallup University contacts each learner to review their level of integration.
of the learning into their day-to-day lives as well as their work environment. Gallup offers further support in helping them transfer the information back to their job. This serves to maximize the momentum and energy generated during the program and provides participants with the opportunity to discuss their progress.

**Other measurement options offered at additional cost are:** Q12 - measures employee engagement; CE 11 - measures customer engagement

The following percentages of each instructional technique for this e-Learning component are as follows:

- Video: 20-39%
- Static Pages: 20-39%
- Simulations: <20%
- Scenarios: 20-39%
- Quizzes: 20%

**Help Desk Support:** Monday-Thursday, 7:00 am-7:00 pm CST; Friday, 7:00 am-5:00 pm CST; Available in English and Spanish; In-house

**Operating systems on which this program is compatible:** Because the e-Learning programs are web-based, they work with all operating systems.

**Required Plug-ins:** Flash, Windows Media Player, Adobe Acrobat Reader

**Minimum Bandwidth:** Dial up

**Browser(s) on which this program is compatible:** IE Explorer 5x, IE Explorer 6x, Netscape 6x, Netscape 7x, Netscape 8x, Opera

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**Building a Strength-Based Organization**

**Modality:** Blended learning

**The single most important skill/competency area addressed in this program:**

- Strategic Thinking/Decision Making

**The secondary skills/competency areas addressed in this program:**

- Setting and Achieving Goals
- Time/Project Management
- High Performing Teams
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management

**Course description:** This program provides executives and managers with knowledge and strategies to create, implement, and sustain a high-performance culture. This blended curriculum has been in existence for 4 years. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

**Participant profile:** The primary audience includes Directors/VPs and High potential leaders. The secondary audience includes Senior VPs/C-level executives, Mid-level managers and Supervisors and/or front-line managers.

**The most common industries represented by clients purchasing this offering are:**

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM

Component 1 – E-Learning Course, “Discover Your Strengths”

Description: The e-Learning course introduces managers and executives to the basics of strengths theory and strengths-based development concepts. It creates deeper understanding of the 34 talents present in people. This e-Learning program is asynchronous (self-paced)

Number of modules: 41 in total; 12 are mandatory

Length of each module: 5-20 minutes, depending on individual understanding and Internet connection

Duration: Total course time: 2 hours

Component 2 – Classroom Training

Description: This course takes the participant through the business model, the Gallup Path, and describes how to build an organization that relies on the strengths of its workforce to drive business outcomes.

Duration: 2½ days

Delivery options available: Gallup trainers/consultants deliver program; Co-facilitation with client trainers

Format of classroom training component:

- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 10%
- Case Studies 20%

Pre-work/Post-work: Prior to the program, students must complete the StrengthsFinder Assessment, and 2 hours of e-Learning around the assessment. Also, students will have an employee engagement survey, the Q12, taken of their direct reports.

Component 3 – Coaching Call – One-on-One Discussion

Description of coaching intervention and its purpose: Gallup Executive Consultants help managers maximize the momentum and energy generated during the course by consulting with them on their specific talents.

Standard number of coaching sessions per participant: 2

Standard duration of each coaching session: 1 hour

Recommend or average frequency of contact: once a month

100% of coaching delivery through the phone

Pre-assessments: Gallup’s web-based assessment called StrengthsFinder provides leaders with insights into their greatest areas of talent. Also, students of this class will have an employee engagement survey, the Q12, taken of their direct reports. The Q12 results reveal how the leader’s management style influences team members’ perceptions and employee engagement. Both of these components are covered under the cost of the program.

Standard materials provided: Pre-work book - Now, Discover Your Strengths, SF34 IMPACT and biographical data form; Q12 data collection; Your Signature Themes, Theme Sequence, and Q12 scorecard reports; two individual coaching sessions.
Demands of Leadership

Modality: Blended learning

The single most important skill/competency area addressed in this program is:


The secondary skills/competency areas addressed in this program are:

- 7 Demands of Leadership - Visioning, Mentoring, Knowing Self, Making Sense of Experience, Maximizing Values, Building a Constituency, and Challenging Experience.

Description: This blended curriculum has been in existence for 12 years. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2004.

Participant profile: The primary audience includes Senior VPs/C-level executives, Directors/VPs and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM

Component 1 - E-Learning course, “Discover Your Strengths”

Description: The e-Learning course introduces managers and executives to the basics of strengths theory and strengths-based development concepts.

Duration: 1½-2 hours of asynchronous (self-paced) e-Learning

Stand-alone available: No

Number of modules: 41 (12 modules are mandatory)

Length of each module: 5-15 minutes, depending on individual understanding and Internet connection

Component 2 - Classroom Discussion, Facilitation, Lecture

Duration: 3 days. Stand-alone option is not available

This program is broken down into the following components:

- Trainer/Consultant Presentation 40%
- Discussion 30%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 20%
- Case Studies 5%

Pre-work/Post-work: Read First, Break All the Rules; Q12 survey with direct reports; E-Learning course: Discover Your Strengths; preliminary telephone interview/consulting session and biographical data form. There is no post-work required.

Component 3 - Coaching Calls, One-on-One Discussion and Feedback

Description: Gallup Executive Consultants help managers maximize the momentum and energy generated during the course by consulting with them on their specific talents.

Duration: Each call is 1 hour

Standard number of coaching sessions per participant: 4 (Plus 2 in-person coaching sessions which happen during the classroom training experience)

Recommend or average frequency of contact: Once a month

Stand-alone available: No
Additional information: All follow-up coaching is delivered via the phone. Consultants and executives establish a follow-up plan, and the executives track their progress as they develop, practice, and refine their leadership engagement and understanding of the Seven Demands of Leadership. This is included in the cost of the Demands of Leadership Program.

Pre-assessments (included in the cost of the program): Gallup’s web-based assessment called StrengthsFinder provides leaders with insights into their greatest areas of talent. Employee engagement survey (the Q12) taken of direct reports.

Standard materials provided with curriculum: For students, the materials for each class includes: pre-work, three-day program, and follow-up: StrengthsFinder, Discover Your Strengths e-Learning, telephone interview, biographical data, and Q12 survey; Your Signature Themes Report, Your Theme Sequence Report; Seven Demands of Leadership and Q12 scorecard reports; Two individual coaching sessions and four follow-up one-on-one telephone coaching sessions.

Great Manager Program

**Modality:** Blended learning

The single most important skill/competency area addressed in this program is:

- Increasing Performance of Others/Performance Management

The secondary skill/competency area addressed in this program is:

- Talent Management (Recruiting/Retaining/Developing Others)

**Course description:** The Great Manager Program is one of Gallup University's most popular programs, attended by thousands of managers and executives from the world's most prestigious companies. Managers gain a greater understanding of self and their management style. They discover the employee-engaging concepts, strategies, and tools that assist them in turning the Four Keys to Great Management and unleashing the human potential within their organizations. This blended curriculum has been in existence for 6 years. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2003.

**Participant profile:** The primary audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders. The secondary audience includes Senior VPs/C-level executives and Directors/VPs.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public & Client-Sponsored Programs:** Both a public program and a client-sponsored version are available.

**DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM**

**Component 1 - E-Learning Course “Discover Your Strengths”**

**Description:** The e-Learning course introduces managers and executives to the basics of strengths theory and strengths-based development concepts.

**Duration:** 1½-2 hours of asynchronous (self-paced) e-Learning

**Stand-alone available:** No

**Number of modules:** 41 (12 modules are mandatory)

**Length of each module:** 5-15 minutes, depending on individual understanding and Internet connection
Component 2 - Classroom Lecture, Discussion, Peer Discussion

Description: Gives manager greater insight to what it takes to be a great manager in a productive workplace. Gallup consultants deliver the program; there are no co-facilitation or train-the-trainer options available.

Duration: 2½ days and there is no stand-alone option.

Pre-work/Post-work for classroom training: Participants complete Gallup’s StrengthsFinder assessment, an e-Learning course, an employee engagement survey (Q12), an individual business impact questionnaire, and a biographical data form. Post-work consists of an Executive Coaching Call with client six months after completing the program.

This program is broken down into the following components:

- Trainer/Consultant Presentation 50%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 10%
- Simulation 10%

Component 3 - One-On-One Executive Coaching

Description: Gallup Executive Consultants help managers maximize the momentum and energy generated during the course by consulting with them on their specific talents.

Duration: There are 2 sessions (1 hour each). Recommend or average frequency of contact is once a month. 100% of coaching delivery is through phone conversations.

Stand-alone available: No

Standard materials provided with curriculum

Pre-work/Post-work: StrengthsFinder, strengths e-Learning, individual business impact questionnaire, and biographical data form; Q12 data collection; Your Signature Themes, Theme Sequence, Q12 scorecard reports; two individual coaching sessions and one follow-up one-on-one telephone coaching session.

Reinforcement/Follow-up options: Executive Coaching Follow-Up Call 6 months after completion of program is included in the price of the program.

Strengths Performance Coaching

Modality: Blended learning

The single most important skill/competency area addressed in this program is:

- Coaching Skills

The secondary skill/competency area addressed in this program is:

- Increasing Performance of Others/Performance Management

Overall description of curriculum: This session provides Strengths Performance Coach candidates with a comprehensive understanding of strengths management concepts and practices. Candidates learn strategies and tactics to help others develop and leverage their talents to meet performance goals and attain business outcomes. This blended curriculum has been in existence for four years. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2004.

Participant profile: The primary audience includes Directors/VPs. The secondary audience includes High potential leaders and Supervisors and/or front-line managers.
The most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Government
- Utilities

DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM

**Component 1 - E-Learning Course “Discover Your Strengths”**

Description: The e-Learning course introduces managers and executives to the basics of strengths theory and strengths-based development concepts.

Duration: 1½-2 hours of asynchronous (self-paced) e-Learning. A stand-alone option is not available. There are 41 modules (12 modules are mandatory). Length of each module is 5-15 minutes depending on individual understanding and Internet connection.

**Component 2 - Classroom Discussion, Lecture, Consultant Facilitation**

Description: 3 days of intensive learning around talents, talent combinations, and how they look in different people.

This program is broken down into the following components:

- Trainer/Consultant Presentation 25%
- Discussion 25%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%
- Simulation 10%

Stand-alone available: No

Pre-work/Post-work: Prior to attending the actual class, prospective coaches complete Gallup’s StrengthsFinder assessment and a 2 hour developmental e-Learning course.

Delivery options: Gallup trainers/consultants deliver program or train-the-trainer programs and licensing.

**Component 3 - One-on-One Executive Coaching**

Description: Gives students the opportunity to have a consultant discuss their talents with them. Duration is 2 sessions (1 hour each). Recommend or average frequency of contact is once a month. 100% of coaching delivery is through phone conversations.

Stand-alone available: No

Standard materials provided with curriculum: The materials for each class includes pre-work, three-day program, and follow-up: StrengthsFinder, Discover Your Strengths e-Learning, questionnaire, biographical data; Your Signature Themes Report, Your Theme Sequence Report; two individual coaching sessions and four follow-up one-on-one telephone coaching sessions.

Reinforcement/Follow-up options and associated costs: Following the completion of the three-day classroom session, coaches receive four consultations with a Gallup strengths analyst/consultant. Ideally, these calls should be completed once per quarter (every three months). The purpose of each call is to help the coach assess their progress and growth, ask questions, and provide them (and their organization) with the support and guidance they need to assure their proper development.

Initial certification: After completing the three-day session, coaches can then begin providing StrengthsFinder feedback and consultation while working towards Gallup certification as a Strengths Performance Coach. In order to attain certification a coach must demonstrate her or his ability to coach at a high level by compiling at least 10 evaluations (from people they’ve coached) that result in a score of 4.0 or higher. Gallup administers the evaluations by mail and email.
Re-certification:  To keep their certification current, coaches must repeat the certification process on an annual basis (annual re-certification is set by the date the person completes the initial three-day training session, not by the date the person attains their initial certification). Re-certification is an additional cost every year.
Gordon Training International (GTI)
531 Stevens Avenue West
Solana Beach, CA  92075-2093
858-481-8121
800-628-1197
http://www.gordontraining.com

Sales contact: Michelle Adams, Director of Client Relations
800-628-1197, ext. 308 workplace@gordontraining.com

FINANCIAL PROFILE
Ownership/Funding: Privately held
Annual fiscal revenue: 2 Years Ago: $0- 9 million; Last Fiscal Year: $0- 9 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago: $0- 9 million; Last Fiscal Year: $0- 9 million
Percentage of revenue from leadership offerings delivered outside the U.S.:
11-15%
Profitability based on last fiscal year: Self sustaining/break even

EMPLOYEE PROFILE
Total number of employees worldwide: 5
Total number of certified contractors delivering leadership training solutions:
Based in U.S. – 200; Based Internationally - 100
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:
Must be certified by Gordon Training International (GTI) or authorized GTI international licensee

ORGANIZATION TENURE
Years in business: 20+; Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased the leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 50.
Percentage of these client companies listed in the Fortune 500: 10%

Top 5 client companies:
1. Merck & Co., Inc.
2. W.L. Gore & Associates
3. Mutual of Omaha
4. Republic Bank
5. Stickler Learning

Top competitors:
1. Franklin Covey
2. Ken Blanchard Companies
3. DDI
4. Center for Creative Leadership

Customer Service infrastructure/philosophy: They pride themselves on being the Nordstrom of Leadership Training and Service. They each have the freedom to solve problems and make the customer happy without getting approval (provided they don’t buy the client a BMW or something). Never make a customer wonder or guess and develop a strong, trustworthy, professional relationship with each customer. Gordon does not provide client forums or use advisory boards.

Data gathering and evaluation: A survey was sent to all L.E.T graduates worldwide October 2004. Survey sent to all Merck graduates (customized L.E.T.) June 2003 (combined total of people surveyed = 2,500)

COMPANY PROFILE
Organization’s investment in R&D as a percentage of leadership sales revenue: 11-15%.
Organization's leadership development philosophy: Gordon Training International's People Productivity Process is based on nearly five decades of research and work that have grown from the theories and applications of Dr. Thomas Gordon, Nobel Peace Prize nominee and founder of the company. Fifty years ago, the autocratic style of management was still so deeply entrenched that a participative, democratic style was seen as revolutionary, even radical. In the 1950's, influenced by his mentor, Dr. Carl Rogers, and other psychologists including Kurt Lewin, Rensis Likert, and Abraham Maslow, as well as the philosopher John Dewey, Thomas Gordon created a model of group leadership in which he identified the attitudes and the specific communication and conflict resolution skills leaders must have to create participative, self-directing, self-governing, problem-solving, decision-making groups. Gordon believed that a democratic environment not only makes people more productive, it also makes them healthier, both mentally and physically. Gradually, the practice of participative management has gained a foothold and, while it is still not as widely used as older command-and-control structures, it is now seeing accelerating adoption as it becomes clear that hierarchical leadership has outlived its usefulness in a complex, technological, rapidly changing world. This shift toward a participative style of management is due in large part to the increasing evidence that management style affects the bottom line. Democracy in the workplace it turns out, doesn't just make people feel better, it also makes economic sense.

Three aspects of a leadership program design that are most important to its success and effectiveness: A great leadership program answers three questions: "Why are we doing this? What will I need to do differently? How do I go about it?" In other words, a leadership program will be effective to the degree that it addresses a clear business need (why), provides meaningful feedback to each participant (what), and provides tools or skills that help the participants change their behavior in ways that will help them meet their own and the organization's objectives (how).

Aspect 1 - The "Why": Programs that are unconnected to the needs of the business will not be taken seriously. Programs that are primarily "feel-good" events can do more harm than good if the participants believe that they are being patronized or manipulated. It is the obligation of the program designer to demonstrate how the skills and tools in the program will enable the organization to better perform its function. They meet/talk/discuss with the client their needs and expectations and customize the L.E.T. course examples and situations to make them relevant for the course participants. They work closely with the client to determine the most important ways in which the model will help them meet their business objectives. They then customize the course accordingly. They also offer a pre- and post-360-degree assessment so that clients can measure the results in the organization.

Aspect 2 - The "What": Each participant should have the opportunity to learn something important about themselves. Generalities about management or organizational theory may be interesting but if the participant can see how their own behavior can contribute to (or hinder) the success of the organization, he or she will be far more likely to make the commitment and do the hard work needed to change their behavior.

They offer the pre- and post-360-degree assessment so that the results of the use of the L.E.T. skills can be measured. This gives the organization proof of the impact of the skills on their business; higher productivity, better communication, less conflict, etc. In addition to the feedback that participants receive in the pre and post assessment, the
class is designed to facilitate a great deal of real-time feedback about each participant's behavior and skill development.

Aspect 3 - The "How": A successful program will provide the participants with the opportunity to learn new tools and skills that will help them make changes in their behavior. Programs that fail on this dimension leave the participants feeling frustrated and unprepared to meet the challenges facing them afterward.

During the course, participants are strongly encouraged to bring up their own real life work situations and problems so that they can see and apply the skills on issues that really matter to them at work. Participants not only hear about the skills but they practice them in very realistic ways in a controlled environment. This gives them many opportunities to build their confidence and their capability to put the skills to use at work.

LEADERSHIP TRAINING DELIVERY METHODS
- Classroom training is offered.
- There were one public, open enrollment program, two client-sponsored programs and three distinct custom-designed programs conducted last year.
- Classroom training represented 75-100% of the leadership revenue in the last fiscal year.
- There are no e-Learning programs, stand-alone leadership training products or blended learning leadership programs/curricula.

Additional information/comments: Due to the personal nature of what they teach, Gordon has yet to find a technology company that can provide a viable e-Learning format for developing relationship skills. They deeply value the live interaction between trainer and participants and the group and will always offer classroom training, but would like to find a company that could provide great blended learning, too.

PROGRAM INFORMATION

Leader Effectiveness Training, (L.E.T.)

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Communication Skills

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management

Course description: Leader Effectiveness Training is an intensive, skills-based training that develops interpersonal communication and conflict resolution competencies in managers and supervisors. Through L.E.T., an organization's leaders learn, practice, and understand when and how to apply a powerful set of tools that measurably influence their workers' behaviors, habits and beliefs. The result is a more productive, efficient and fulfilling workplace. L.E.T. is based on pioneering research by Dr. Thomas Gordon,
the founder of GTI, who created the foundational systems and tools that comprise L.E.T. The program was designed from the ground up to match the way human beings function, with an understanding of the psychological needs that drive people to behave the way they do. This program has been in existence since 1975. The date of last significant update/revision (defined as >=30% content revision) is 01/01/2002.

**Formal third party recognition and/or awards:** The creator of the model that is taught within this program (referred to as The Gordon Model) has been awarded for his work. The California Psychological Association and American Psychological Association both awarded him lifetime achievement awards. He was also nominated three times for the Nobel Peace Prize. He has received countless other awards and citations, too numerous to list. He was 84 after all.

**Participant profile:** The primary audience includes High potential leaders. The secondary audience includes Senior VPs, C-level executives, Directors, VPs, Mid-level managers and Supervisors and/or front-line managers.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Utilities

**Public Program:** A three-day public program is available.

**Prerequisites:** No

**The program design includes the following components:**
- Trainer/Consultant Presentation 15%
- Discussion 40%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%
- Simulation 5%

**Pre-work/Post-work:** Pre-workshop packet and L.E.T. text is sent ahead of time for reading assignments and a written exercise to complete in packet before workshop. There is no post-work involved.

**Standard materials provided with program:** L.E.T. text (25th anniversary edition), L.E.T. Workbook, Pre-workshop Packet, Wallet Card, Desk Top Reminder, A Credo, Participant Certificate

**Reinforcement/Follow-up options and associated costs:** Free email service called The Graduate Connection sent once a month to all L.E.T. graduates that sign up. Designed to reinforce and support use of L.E.T. skills (stories, tips, refresher material pulled from L.E.T. materials, etc.)

**Standard way to measure program effectiveness and individual behavior change:** Feedback (both verbal and written) via workshop evaluations and continual follow up calls and emails to each graduate.

**Other measurement options:** Pre- and post-360-degree assessment for an additional fee.

**Languages in which this public program is currently offered:** U.S. English, U.K. English. Spanish, French, Italian, German, Dutch, Korean, Japanese, Chinese – Mandarin, Turkish, Hungarian, Malagasy, Thai, Icelandic, Finnish, Portuguese, Swedish

**Countries in which this public program is currently offered:** Australia, Canada, China, Denmark, England, Finland, France, Germany, Hungary, Ireland, Italy, Madagascar, Monaco, The Netherlands, South Korea, Sweden
Total number of participants in the public, open enrollment version of this program last fiscal year: 30; 85% reside in the U.S.

Top competitive offerings:
1. *Situational Leadership*, Blanchard
2. *7 Habits of Highly Effective People*, Franklin Covey
3. DDI

Client-Sponsored Program: A client-sponsored program is available.

Customization: Different client leadership models and/or other client-specific needs are not accommodated; there is no customization.

Pre-assessments: Available to participants for a fee.

Delivery options provided:
- Trainers/consultants deliver the program.
- There is no co-facilitation with client trainers.
- Train-the-trainer programs and program licensing are available.

Maximum number of participants: 24; one trainer/consultant is required.

Train-the-Trainer Workshop: A trainer kit is included with each tuition. If four or more attend, workshop is 4 days. If less than 4 attend, then 3 days.

Maximum number of participants: 10; Number of trainers/consultants required: 1.

Prerequisites: None; Duration: 3 days

The program design includes the following components:
- Trainer/Consultant Presentation 15%
- Discussion 40%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%
- Simulation 5%

Pre-work/Post-work: Pre-workshop packet and L.E.T. text sent ahead of time for reading and worksheet assignments. There is no post-work.

Standard materials provided with program:

Reinforcement/Follow-up options and associated costs: A free email service called The Graduate Connection is sent once a month to all L.E.T. graduates that sign up.

Standard way to measure program effectiveness and individual behavior change: Verbal and written evaluations during and after workshop, and follow-up calls made to all participants on a continual basis. Other measurement options offered at additional cost: pre and post 360-degree assessment.

Languages/Countries in which the client-sponsored program is currently offered: U.S. English in the United States

Total number of participants in the client-sponsored version of this program last fiscal year: 20; 95% reside in the U.S.

Top competitive offerings:
1. Situational Leadership, Blanchard
2. *7 Habits Of Highly Effective People*, Franklin Covey

Additional information/comments: Gordon Training has an agreement with both their independent and in-house trainers that they can open up their own classes to one to three GTI clients—Gordon arranges for the client to attend either an internal class or a public class that the trainer (that Gordon certifies) is offering.
Harvard Business School Publishing (HBSP)

(Harvard Business School Publishing is a wholly owned, not-for-profit subsidiary of Harvard University.)

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Matt Kenslea
617-783-7741
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Leadership Training URL:
http://www.elearning.hbsp.org

Additional office location:
509 Madison Avenue
15th Floor
New York, NY  10022
212-872-9280

FINANCIAL PROFILE
Ownership/Funding:  Not-for-profit
Mergers/Partnership/ Formal Alliance Activity (over the last 24 months):  On 2/27/04, The National Restaurant Association Educational Foundation (NRAEF) announced a partnership with Harvard Business School Publishing e-Learning (HBSP). The NRAEF and HBSP e-Learning will launch a co-branded leadership and management development program tailored to the restaurant, foodservice, and hospitality industry. This forthcoming program is an online management support tool founded on Harvard Business School Publishing’s e-Learning programs.

EMPLOYEE PROFILE
Total number of employees worldwide:  250
Total number of employees delivering leadership training solutions:  67 based in the U.S.
Total number of certified contractors delivering leadership training solutions:  Based in the U.S. - HBSP has a pool of facilitators and consultants to draw from, as needed.
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:  Minimum of 10 years’ experience, ideally with past experience with HBSP products.
Total number of developers of leadership training solutions:  17

ORGANIZATION TENURE
Years in business:  20+; Years as a leadership training vendor:  20+

CLIENT PROFILE
Number of client companies who purchased the leadership training solutions in the last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.):  198 companies
Percentage of these client companies listed in the Fortune 500:  24.24%
Top 5 client companies:  
1. Allstate Insurance Company  
2. Pfizer  
3. IBM  
4. U.S. Navy  
5. Ford Motor Company

Top 5 competitors: While HBSP does not view any companies as direct competitors with fully comparable offerings, the following companies are sometimes named as competitors by the industry.  
1. Thomson/NETg  
2. SkillSoft  
3. Ninth House  
4. Achieve Global  
5. DDI

Customer Service infrastructure/philosophy: The Implementation Services group brings tactical expertise to all phases of technical implementation. During the implementation process, they will ensure a well-executed and effective rollout of online learning programs throughout the entire company. They will assist with integrating the content into your programs, building an internal marketing strategy, facilitator training, as well as technical custom services. To ensure long-term success, they provide ongoing support for customers.

Client forums or advisory boards: The HBSP Corporate Partners Group aims to bring together chief learning officers from leading customer organizations in the U.S. and Europe to share knowledge and resources. Since 1993, HBSP Corporate Partners have gathered twice a year – once in a face-to-face meeting on-campus at Harvard Business School and once in a virtual setting. The HBSP Partners share best practices, hear about trends and innovations from well-known business experts, and offer feedback to provide HBSP with insight into product needs and practices.

Harvard Business School Publishing and HBSP e-Learning regularly conduct customer and industry surveys, as well as focus groups, to gather input for future product direction, product enhancements and services offerings.

Most recently, HBSP e-Learning conducted a research project that surveyed CLOs and other learning and development professionals in the corporate market. This research was conducted in late 2004.

COMPANY PROFILE
Leadership Development Philosophy: Harvard Business School Publishing is dedicated to improving the practice of management worldwide. They understand that today you face a multitude of challenges, from increased competition and a diminishing talent pipeline, to the need to measure the return on your training initiatives. They want to help you face these challenges and demonstrate the positive impact of a true learning culture on your business.

Hundreds of the world’s leading global organizations use e-Learning solutions from Harvard Business School Publishing to create powerful and effective learning experiences for their teams. They are committed to delivering the most practical and results-oriented online employee development, created by a team on the leading edge of business ideas. Their products are based on core principles that contribute to success.
within leading organizations, including world-class content, commitment to client services, proven instructional design, and flexible delivery options.

The three aspects of a leadership program design that are most important to its success and effectiveness are:

Aspect 1 - World-class content: The e-Learning development team builds products based on high quality Harvard Business School Publishing content. They capitalize on access to the best thinking available from many of the world’s foremost subject matter experts—from Daniel Goleman and Rosabeth Moss Kanter to John Kotter and Michael Porter—to create the most effective leadership and management programs available today.

Aspect 2 - Address the way people learn: Through interactive real-world scenarios, hands-on activities, and practical tools to directly apply concepts. A framework of follow-up goals, comprehension tests, and mentoring tips extend learning beyond a single session.

Aspect 3 - Modular and flexible programs: They help busy managers overcome challenges and master new skills at their own pace, without significant time investment. Many learning elements require only 10 minutes to complete, so users can quickly learn and apply critical concepts and skills to their own work situations. Harvard Business School Publishing programs draw on expertise in both online and participative learning to deliver resources to facilitate blended learning.

LEADERSHIP TRAINING DELIVERY METHODS

Classroom training: Classroom training programs are not offered.

E-Learning programs: There are three product lines including more than 75 modules/topics.

1. Harvard ManageMentor
2. The Essential Leader
3. Case in Point

Blended learning leadership programs/curricula: 1 plus blended learning options with other product lines.

STANDARD INFORMATION FOR ALL TRAINING SOLUTIONS

Help Desk Support: Monday – Friday, 8:00 am – 6:00 pm EST; Available in English, Spanish, French, Portuguese and additional languages by request; In-House

Operating systems on which this program is compatible: Windows 98, Windows 2000, Windows XP

Required Plug-ins: Flash: Macromedia Flash 4.0 or better (optional); Real Audio; Windows Media Player; Adobe Acrobat 4.05 or better

Minimum Bandwidth: While the product will function via all of the following, they recommend a cable modem or equivalent to support the new media elements and minimize load time. Access and usage will be slow using a dial-up.

Browser(s) on which this program is compatible: IE Explorer 5x, IE Explorer 6x, Netscape 6x, Netscape 7x, Netscape 8x

Compatible/Compliant: SCORM compatible, AICC compatible

HBSP product lines are deployed with all of the leading Learning Management Systems.
Case in Point™

Modality: Blended Learning

The single most important skill/competency area addressed in this program is:
- Problem Analysis/Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program are:
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

Overall description of curriculum: Case in Point is a flexible set of online cases designed to help prepare middle- to senior-level managers for a variety of leadership challenges. These short, reality-based scenarios provide sophisticated content based on common business dilemmas. Designed for either blended learning or standalone usage, Case in Point allows participants to quickly relate key leadership and management concepts to their own business environment. Each case concludes with recommended best practices based on the extensive research of renowned experts.

HBSP launched Case in Point in February of 2004. The date of last significant update/revision (defined as >=30% content revision) is 11/15/04 – Harvard Business School Publishing e-Learning Extends Case In Point™ with Delivery of Ten New Topics for Business Leaders.

Participant profile: The primary audience includes Mid-level managers. The secondary audience includes Senior VPs, C-level executives, Directors, VPs, Supervisors and/or front-line managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Public Sector/Academic

DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM

Component 1 - Case Review

Modality: e-Learning
Pre-work for participant
Duration: 20 minutes; Stand-alone available: Yes
Component 2 - Prepare Facilitation (if appropriate)

Modality: Manual
Preparation for classroom

Duration: 90-120 minutes; Stand-alone available: No

Component 3 – Classroom Training

Modality: Classroom training
Facilitated discussion of case

Duration: 45-60 minutes; Stand-alone available: No

Component 4 - Follow-up

Modality: e-Learning
Tools and resources for participants

Duration: Varies; Stand-alone available: Yes

Customization: Organizations can customize the look and feel to match their corporate identity and modify pictures and scenarios to more closely match a particular industry.

Languages in which this blended curriculum is currently offered: U.S. English
Countries in which this blended curriculum is currently offered: All

Top competitive offerings:
1. Thomson NETg
2. SkillSoft

Reinforcement/Follow-up options and associated costs: Follow-up tools and resources for participants are offered as part of each Case in Point title.

DESCRIPTION OF LIVE, CLASSROOM TRAINING COMPONENT

Train-the-Trainer Programs and Program Licensing:

Duration: 1-day per course
Maximum number of participants: 25
Number of trainers/consultants required: 1
Duration of classroom training: Typically 1 hour

Format of classroom training component:
- Discussion 60%
- Case Studies 40%

Pre-work/Post-work: Yes

Name of e-Learning component(s) or CD-ROM: Hosted CD or FTP downloads, readily installed on an LMS

Description: Based on real management scenarios and insights from the research and writings of experts in the field, the cases are reviewed and vetted by world-renowned content experts such as Linda Hill, Eric Abrahamson, Dorothy Leonard and Harry Mills.

A complete facilitation guide accompanies each case and includes learning points, a case analysis revealing the learning embedded in the scenario, a detailed discussion plan, and tips for leading a case discussion. These guides substantially reduce preparation time for facilitators.

This e-Learning program is asynchronous (self-paced)

Pre-work/Post-work: Involves review of the case by the participants in advance of the classroom session. Participants review the case, and develop their own conclusions, then bring their different points of view and experience to the discussion. Tools and resources (articles, newsletters, etc.) for participants are available for use following the classroom session.
The Essential Leader

Modality: e-Learning

The single most important skill/competency area addressed in this program is:

- Assessing/developing your leadership skills/style

The secondary skills/competency areas addressed in this program are:

- Strategic Thinking/decision making
- Motivating/inspiring others
- Coaching skills
- High performing teams
- Conflict resolution
- Communication skills
- Leading/sponsoring change efforts
- Appreciating Diversity
- Increasing Performance of Others/Performance Management
- Business Acumen

Course description: The Essential Leader line consists of 13 titles which address critical leadership responsibilities such as decision making, effective communication, and leading others. Managers are immersed in interactive, role-playing scenarios supplemented by expert feedback. The self-directed structure and intuitive navigation means managers can take charge of their own learning, while tracking features allow you to monitor progress and program usage patterns. This program has been in existence since 2001. The latest title was released 07/2003.

The Essential Leader will enable your organization to:

- Infuse core leadership skills throughout the organization
- Help managers prepare for and move more quickly into leadership roles
- Improve essential management skills at all levels as managers gain confidence in their knowledge and abilities
- Ensure the organization's future success by building a cadre of developing leaders
- This program is asynchronous (self-paced)

In general, managers using the program will be able to:

- Utilize reality-based scenarios to test their leadership skills in a safe environment
- Build an experience repertoire through a learn-by-doing approach
- Identify personal strengths and weaknesses and target areas for improvement
- Reinforce learning through self-assessment tools, diagnostics, and customized feedback

While the agenda varies slightly for each title, a typical title will include:

- Three actual scenarios
- 3-4 tools
- Additional resources including articles and quizzes

Participant profile: The primary audience includes Mid-level managers. The secondary audience includes Supervisors and/or front-line managers and High potential leaders.

Customization: Limited customization is offered. Organizations can customize the look and feel to match their corporate identity and modify pictures and scenarios to more closely match a particular industry.

Number of modules: 13 titles
Length of each module: The length varies depending on the title. They average 6 to 8 hours.

Percentage of each instructional technique for this program:
- Audio 20-39%
- Video <20%
- Static Pages 20-39%
- Simulations <20%
- Scenarios 40-59%
- Quizzes <20%

Pre-work/Post-work: There is no pre-work. Comprehension tests are available.

Standard materials provided with program: Implementation Toolkit; Facilitation Guide; Certificates of Completion

Optional materials available: Comprehension tests; Co-branding

Standard way to measure program effectiveness and individual behavior change:
Level 3 Kirkpatrick comprehension tests and certificates of completion.

Other measurement options offered: LMS hosting option that includes reporting.

Languages in which this program is currently offered: U.S. English, Spanish, French, German, Portuguese

Help Desk Support: Monday – Friday, 8:00 am – 6:00 pm EST; Available in English, Spanish, French, Portuguese. Additional languages available by request; In-House

HBSP has deployed Universal Access with the following Learning Management Systems: Docent, Saba, Learning Space, THINQ TrainingServer, Knowledge Planet, Plateau, Oracle iLearning, Aspen

Top competitive offerings:
1. Achieve Global
2. Ninth House
3. SkillSoft
Interaction Associates, Inc.
625 Mt. Auburn Street  
Cambridge, MA  
617-234-2700  
http://www.interactionassociates.com
Sales contact:  
Jennifer Garrison  
415-241-8000  
Jennifer@interactionassociates.com
Additional office location:  
600 Townsend St. #550W  
San Francisco, CA 94103  
415-241-8000

FINANCIAL PROFILE
Ownership/Funding: Privately held, Employee-owned
Mergers/Partnership/Formal Alliance Activity: Formed partnerships with DigitalThink, Novations, Center for Organizational Fitness, Insight Experience, iDL, Ariel Group, DiCor.

EMPLOYEE PROFILE
The total number of employees worldwide is 50. The number of employees delivering leadership training solutions based in the U.S is 50. The number of certified contractors delivering leadership training solutions based in the U.S. is 30 and based Internationally is 10.
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions: Must attend train-the trainer programs and co-train workshops before certification. All have business background and experience, and most have post-graduate degrees.
Total number of developers of leadership training solutions: Varies

ORGANIZATION TENURE
Years in business: 20+ (35); Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 200
Percentage of these client companies listed in the Fortune 500: 65%
Top competitors:  
1. Forum Corp.  
2. Ken Blanchard  
3. CCL  
4. Linkage
Customer Service infrastructure/philosophy: Interaction Associates (IA) helps clients achieve success – outstanding results, better work processes and satisfying relationships – by providing high quality learning and consulting solutions that improve their collaborative capability in the most complex and challenging situations.

IA is committed to exceeding client expectations and adding significant value to any project in which they participate. Their approach to guaranteeing satisfied customers is to diligently plan, implement and evaluate each client engagement. Here are some of the actions they take to ensure success.
Planning:
- Develop detailed contracting on project deliverables.
- Make clear agreements with key stakeholders on success criteria up-front.
- Build detailed product blueprints with specific and frequent client sign-off points.
- Make specific agreements about how they will work together to integrate changes throughout the project.
- Make agreements about how they will communicate and share feedback for the duration of the project.

Implementing:
- Provide clients with the best resources to meet their needs.
- Meet regularly to obtain feedback on how they are doing on specific deliverables across three dimensions of success: Intended Results, Overall Process and Client Relationship.
- Check in frequently to get client feedback and adjust expectations as needed.
- Collect detailed feedback from target populations and stakeholders during the piloting process.
- Facilitate immediate meetings with the client to agree upon conclusions, implications and any required next steps or adjustments.

Evaluating:
- Complete project evaluations to capture best practices and areas for improvement.
- Provide employees with candid, direct feedback.
- Examine participants' written evaluations, and develop any corrective action along the way.

More than 75% of IA’s work is repeat business. Its reputation and growth have come from providing clients with consistently high quality products and services.

IA has a client advisory board and regularly seeks input from and surveys customers. Evaluations: Level I evaluations are routine. They use participant evaluations and performed 2 Success Case Method evaluations studies in 2004.

LEADERSHIP DEVELOPMENT PHILOSOPHY
IA’s curriculum is based on three key content areas:
1. Personal Awareness
2. Strategic Thinking
3. Collaborative Skills

IA works with clients to identify program objectives and ensure they are tied to organization objectives and strategies.

Some examples of program objectives include:
- Drive new strategies down through the leadership pipeline to ensure understanding and facilitate execution.
- Effect the corporate culture change required to successfully respond to new markets, customers, and competitors.
- Accelerate the merger-and-acquisition process through leadership integration.
- Increase your organization's ability to respond to changing global markets and competitive conditions through an integrated approach to global strategy, structure, corporate culture, and people.
The three aspects of a leadership program design that are most important to its success and effectiveness are:

1. Practical, skill building and applicable to real work issues. Utilize action learning and work groups, and get real work done over the course of the program or learning process.
2. Tied to organization’s leadership model. Customize the program to specifically address and build these aspects, use front-end needs analyses and assessments.
3. Personal Awareness to allow ongoing self-reflection and self-correction; 360-degree assessments, peer team feedback, building in appropriate content.

Classroom training is offered. There are three public, open enrollment programs; three to six client-sponsored programs and three distinct custom-designed programs were conducted last year. Classroom Training represented 75-100% of their leadership revenue in the last fiscal year. E-Learning programs are not offered as standalone solutions, however, they integrate a business simulation into their leader acceleration program, making it a blended learning solution.

**PROGRAM INFORMATION**

**Facilitative Leadership**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Applying a model of seven practical leadership practices

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Creating and Communicating an inspiring Vision
- Celebrating Accomplishments

**Course description:** Research by The Conference Board, an independent source of business research and analysis, has shown tomorrow’s leader must be a: Master Strategist, Change Leader, Relationship Builder and Talent Developer. The Facilitative Leader is all of these. This workshop helps develop skills to improve productivity, decision-making, cross-functional collaboration and employee responsiveness. This program has been in existence since 1991. The date of last significant update/revision (defined as >=30% content revision) is 01/01/1997.

**Participant profile:** The primary audience includes High potential leaders, Mid-level managers and Supervisors and/or front-line managers. The secondary audience includes Senior VPs/C-level executives and Directors/VPs.
Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Pharmaceutical and Biotech

Public Program: A three-day public program is available.

Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%

Pre-work/Post-work: Pre-work is a written questionnaire. There is no post-work.

Standard materials provided with program: Comprehensive manual.

Optional materials available and associated costs: Based on client need.

Reinforcement/Follow-up options and associated costs: Based on client need.

Standard way to measure program effectiveness and individual behavior change:
Level 1 evaluations completed at the end of the workshop.

Languages in which this public program is currently offered: U.S. English and Spanish

Countries in which this public program is currently offered: United States and United Kingdom

Total number of participants in the public, open enrollment version of this program in the last fiscal year is: 50; 95% reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Situational Leadership, by Ken Blanchard
2. Leadership & Team Development for Management Success, by American Management Association
3. Foundations of Leadership, by Center for Creative Leadership

Client Sponsored Program: A client-sponsored program is available. There is no complete custom design but limited customization is available, based on client needs; they can create a learning process, or customize content.

Pre-assessments: Some clients use an optional 360-degree assessment in conjunction with this workshop.

Delivery options: Trainers/consultants deliver program; co-facilitation with client trainers, train-the-trainer programs and program licensing are also available.

Prerequisites: Trainers must have attended the class for Train-the-Trainer workshops.

Duration of client-sponsored program: 3 days

The program design includes the following components:
- Trainer/Consultant Presentation 35%
- Discussion 35%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 20%
- Case Studies 5%

Pre-work and Post-work: Based on client need.

Standard materials provided with program: Workshop Participant Manual
Reinforcement/Follow-up options and associated costs: Based on client need, they can provide refreshers, clinics, and coaching services.

**Standard way to measure program effectiveness and individual behavior change:** Participant evaluations; Success Case method

**Other measurement options offered at additional cost:** Based on client need and budget.

**The languages in which the client-sponsored program is currently offered:** U.S. English, U.K. English and Spanish. The client-sponsored program is currently offered in all countries.

**Total number of participants in the client-sponsored version of this program last fiscal year:** 10,000; 85% reside in the U.S.

**Top 3 competitive offerings by program name and vendor:**
1. Situational Leadership, by Ken Blanchard
2. Leadership & Team Development for Management Success, by AMA
3. Foundations of Leadership, by Center for Creative Leadership

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**Strategic Leadership Skills**

**Modality:** Blended learning

**The single most important skill/competency area addressed in this program is:**
- Strategic thinking
- Personal awareness
- Collaborative skills

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen

**Course description:** Interaction Associates' Strategic Leadership Skills, a dynamic and intensive multi-day executive development program, integrates a robust leadership framework; essential leadership strategies and tools; a state-of-the-art business simulation; 360-degree feedback to accelerate the development of high-potentials and equip executives with strategic thinking, collaborative skills, and personal awareness. This blended curriculum has been in existence for three years. The date of the last significant update/revision (defined as >=30% content revision) is 09/01/2002.

**Formal third party recognition and/or awards:** This program was mentioned in The Conference Board Report "Developing Leaders for 2010," 2001.

**Participant profile:** The primary audience includes High potential leaders. The secondary audience includes Senior VPs/C-level executives and Directors/VPs.
The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Prerequisites: Completion of 360-degree feedback assessment of the client's choice.

Complete custom design: IA will consult with and assist client to develop their own leadership model and customize course to that model.

Limited customization: IA can provide a model or work with client's existing leadership model.

Pre-requisites: 360-degree feedback from MRG

Languages/Countries in which training solutions are currently offered: This blended curriculum is currently offered in US English and UK English in all countries.

Top 2 competitive offerings by program name and vendor:
1. Strategic Leadership Experience, by DDI
2. Looking Glass Experience, by Center for Creative Leadership

The standard materials provided consist of manuals. Optional materials of 360-degree feedback are provided by the client or are purchased through IA.

Reinforcement/Follow-up options: Custom follow-up/refresher clinics are available based on client needs and budget (example – action learning between classroom sessions).

Standard way to measure program effectiveness and individual behavior change: IA works with the client to determine the most efficient measurement of impact, and at what level. The Success Case method is one option. Other methods include surveys and 360-degree feedback results.

Other measurement options offered at additional cost: IA creates measurement systems based on client need and budget.

NAME OF CLASSROOM COMPONENT
Customized based on client need and may include: Strategic Agility/Thinking, Coaching, Conflict Resolution, High Level Communication, Strategy, Mission and Vision, Creation, Motivation and Empowerment, Self Awareness, Emotional Intelligence, Complex Agreement Building, Stakeholder Analysis and Business Case Change Management, Diversity, Employee Retention, and Building Partnerships

Delivery options: Trainers/consultants deliver the program; co-facilitation with client trainers, train-the-trainer programs and program licensing are also available.

Maximum number of participants: 12

Number of trainers/consultants required: 1 consultant

Duration of classroom training: 4-5 consecutive days, or 5 days spread over time with action learning projects and coaching in between.

The program design includes the following components:
- Trainer/Consultant Presentation – 20%
- Discussion – 20%
- Exercises/Quizzes – 5%
- Group Activities/Role Plays – 20%
- Case Studies – 10%
- Simulation – 25%

Pre-work/Post-work: Worked out with client.

E-Learning components:
- Insight Experience Info Master business simulation
- Novations Creative Solutions business simulation
**Description**: During the business simulation, participants run a business over a three-year period. Their success is based on their abilities to excel in assessing and making decisions relative to the following key criteria: Strategic thinking, Teamwork, Price, Reputation, Service offering expertise, Product quality, Quality of personnel, Leadership skills.

The means by which IA achieves these goals is through skillfully identifying and communicating with key stakeholders such as customers and employees. **This program is**: Synchronous e-Learning (real-time) **Pre-assessments**: 360-degree feedback. Clients own or they can make recommendations based on budget.

**Number of modules**: Varies

**Length of each module**: 1-3 hours

**Total course time**: 5-7 days

**Pre-work/Post-work**: Pre-work consists of a 360-degree assessment and post-work is based on client needs.

**The following indicates the % of each instructional technique used for this e-Learning component:**

- Audio <20%
- Video <20%
- Static Pages 20-39%
- Simulations 20-39%
- Scenarios 20-39%
- Quizzes <20%

**Help Desk Support**: Not available.

**Operating systems on which this program is compatible**: Windows 98, Windows 2000, Windows NT Windows ME, Windows XP

**Browser(s) on which this program is compatible**: IE Explorer 5x, IE Explorer 6x, Netscape 6x, Netscape 7x, Netscape 8x

**Additional information regarding the e-Learning component**: The business simulation is used in context of the classroom, in teams.

**Name of coaching solution**: Coaching

**Description of coaching intervention and its purpose**: Coaching can be integrated as part of a learning process, over time, to develop high-potential leaders or to apply the skills learned to real business issues between classroom sessions.

**Percentage of coaching delivery through:**

- Face-to-Face Meeting 33%
- Phone Conversations 33%
- Email 33%

**Additional information**: Coaching is optional and the coaching component is based on client need. Standard number of coaching sessions, duration and average frequency of sessions are all custom solutions based on client need.
The Ken Blanchard Companies

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Blanchard House
1 Graham Road, Wimbledon
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United Kingdom
Phone outside the UK: 44-20-8540-5404
Phone within the UK: 020-8540-5404

FINANCIAL PROFILE
Ownership/Funding: Privately held
Annual fiscal revenue: 2 Years Ago: $30-39 million; Last Fiscal Year: $30-39 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago: $20-29 million; Last Fiscal Year: $20-29 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 26%+
Profitability based on last fiscal year: GAAP profitable; EBITDA profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 250

ORGANIZATION TENURE
Years in business: 20 years+; Years as a leadership training vendor: 20 years+

CLIENT PROFILE
Number of client companies who purchased the leadership training solutions last fiscal year: 8,000
Percentage of these client companies listed in the Fortune 500: 50%
Top 5 client companies:
1. Pfizer
2. American Express
3. Hilti
4. Nokia
5. Amgen

COMPANY PROFILE
Customer Service infrastructure/philosophy: To innovate in today’s business environment organizations must constantly seek to transform their people and their business practices by creating environments where people, customers, profits, and productivity thrive. Great service is a way of life and a value for successful organizations. Improving both internal and external customer focus is supported through identifying customer needs, designing systems to meet those needs, and delivering plus one service on customer expectations.
Organization's investment in R&D as a percentage of leadership sales revenue: 11-15%
Leadership development philosophy: Developing leaders and leadership bench strength for the future is the cornerstone of any profitable, productive organization. Today, leaders must not only excel at managing others but also be able to manage themselves, teams, and the organization to drive performance and productivity. The
leadership programs are based on sustainable commonsense solutions that unleash the potential and power of people, leaders, and teams.

LEADERSHIP TRAINING DELIVERY METHODS


Custom-Designed Programs (conducted last year): Too many to list

Classroom training represented 25-49% of leadership revenue in the last fiscal year.

E-Learning Programs: Most core offerings are available through an e-Learning or blended learning component. E-Learning represented 25-49% of leadership revenue in the last fiscal year.

Blended Learning Programs: Situational Self Leadership, Situational Leadership II, Situational Leadership II for Sales Leaders, Situational Frontline Leadership, Coaching Essentials for Leaders, Situational Team Leadership, Team Skills, Team Work, Team Meetings, Team Chartering, Strengthening Virtual Teams, Creating Your Organization’s Future, Gung Ho!, Whale Done!, Raving Fans, High Performing Organizations. Blended Learning represented 50-74% of their leadership revenue in the last fiscal year.

Additional Information: The Ken Blanchard Companies is a global leader in providing custom and off-the-shelf leadership training solutions, coaching, and assessment capabilities for individuals, leaders, teams, and organizations.

STANDARD ANSWERS FOR ALL LEADERSHIP TRAINING SOLUTIONS

Most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Delivery options: Trainers/consultants deliver the program; co-facilitation with client trainers, train-the-trainer programs and program licensing are also available.

PROGRAM INFORMATION

Building High Performing Teams

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- High Performing Teams

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
Course description: This program provides a process for helping organizations move toward a team-based culture. It is a system for laying the conceptual and contextual framework for creating teams that are productive, effective and get results. It is a highly interactive process for understanding group dynamics, the stages of group development and how to be an effective team member and leader. Key areas include chartering, communication, meetings, valuing differences, conflict management, problem solving, and creativity. The program is available as a traditional classroom training process, through blended learning, or through virtual training. This program has been in existence for 10 years. The date of last significant update/revision (defined as >=30% content revision) is 04/30/2004.

Participant profile: The audience includes all levels of management equally.

Public & Client-Sponsored Programs: A public and a client-sponsored program are available.

Situational Self Leadership

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Building Positive Relationships with Others

The secondary skills/competency areas addressed in this program are:
- Setting and Achieving Goals
- Time/Project Management
- Communication Skills
- Building Positive Relationships with Others
- Creativity and Innovation
- Dealing with Ambiguity
- Creating a workforce of engaged and self-empowered individuals who excel at managing themselves and are able to ask for what they need from their bosses and peers.

Course description: Situational Self Leadership represents the latest in accelerated learning concepts that create interactive and effective learning experiences. It is a process for creating engaged, self-empowered individuals who excel in managing themselves and are able to ask for what they need from their bosses and peers. The program empowers individuals to take responsibility and leadership even when they are not in charge, to set goals that will drive the organization's initiatives, to contract with their managers for direction and support, and to collaborate with peers. This process is available through traditional classroom, blended learning and e-Learning modalities. This program has been in existence for 10 years. The date of last significant update/revision (defined as >=30% content revision) is 04/01/2004.

Participant profile: The primary audience includes Supervisors and/or front-line managers. The secondary audience includes Mid-level managers.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public & Client-Sponsored Programs: A public and a client-sponsored program are available.
Situational Leadership II

Modality: Classroom learning

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Talent Management ( Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

Course description: Situational Leadership II is the most comprehensive, practical and widely used method for managing and developing people, time, and resources in the world. It provides a model and a set of tools for opening up communication and helping others develop self-resilience. It is designed to increase the frequency and quality of conversations around performance so that competence is developed, commitment is gained and talented individuals are retained. Situational Leadership II is recognized both as a business language and a framework for developing people. It is a model that works across cultural, language, and geographical barriers by teaching leaders to diagnose the needs of an individual or a team. This process is available in custom and off-the-shelf versions and can be delivered through traditional classroom training, blended learning, and e-Learning modalities. This program has been in existence since 1969. The date of last significant update/revision (defined as >=30% content revision) is 12/30/2000.

Participant profile: The primary audience includes Mid-level managers and High potential leaders. The secondary audience includes Senior VPs/C-level executives, Directors/VPs and Supervisors and/or front-line managers.

Public Program: A two-day public program is available.

Prerequisites: No

The program includes the following components:
- Trainer/Consultant Presentation 25%
- Discussion 25%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%

Standard materials provided with program: Participant Workbook

Client-Sponsored Program: A client-sponsored program is available.
Kenan-Flagler Business School Executive Education  
The University of North Carolina at Chapel Hill

Campus Box 3445  
Rizzo Center  
Chapel Hill, NC 27599  
http://www.kenan-flagler.unc.edu  
Leadership Training URL: http://www.exed.unc.edu

Sales contact: Lisa Walker  
800-862-3932  
lisa_walker@unc.edu

FINANCIAL PROFILE
Ownership/Funding: Not-for-profit
Mergers/Partnership/Formal Alliance Activity: Partnerships with the Society for Human Resource Management and the Center for Creative Leadership
Annual fiscal revenue: 2 Years Ago -$0-9 million; Last Fiscal Year - $10-19 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching): 2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%

EMPLOYEE PROFILE
Total number of employees worldwide: 18
Total number of employees delivering leadership training solutions based in U.S.: 70
Total number of certified contractors delivering leadership training solutions: 0
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions: Business School faculty teaches most programs and therefore all have PhDs. However from time to time they utilize the services of outside consultants or subject matter experts that have a combination of experience and education.

ORGANIZATION TENURE
Years in business: 20 years+; Years as a leadership training vendor: 20 years+
Number of client companies who purchased leadership training solutions last fiscal year: 880

CLIENT PROFILE
Customer Service infrastructure/philosophy: UNC Kenan-Flagler’s primary goal is to put the customer first. They have a track record of excellence in customer satisfaction. From the inception of their work with custom clients, they have consistently received high marks and positive comments on program evaluations from participants at the conclusion of each session. Clients consistently mention their expertise in the following areas when asked why they choose to partner with UNC: experience in and extensive knowledge of the customer’s core business; a clear understanding of the customer’s program goals and objectives; attention to detail in every aspect of the program development and delivery; exemplification of their “Customer First” service philosophy; ability to provide a foundation for a common culture through the delivery of consistent and sustainable learning experiences to select mid- and senior-level executives; flexibility and customer orientation; innovative ideas about evaluations and cases; program delivery & organizational structure, i.e. staff with knowledge of executive education on the design and development team; experience in client’s industry; and ability to instill stability and common culture in the company through common experiences with the program.
UNC Kenan-Flagler uses advisory boards for programs that are specific to functional areas or industries. Work is currently in progress with a number of custom clients to gather data and evaluate the impact of training in their workplaces.

**COMPANY PROFILE**

**Leadership Development Philosophy:** Kenan-Flagler Executive Education has designed and delivered executive education programs with excellent results for over 50 years to a diversified clientele. A pioneer in executive education, Kenan-Flagler’s Senior Executives Institute was among the first six such programs to be offered in the early 1950s. Since that time, Kenan-Flagler has developed and conducted open enrollment and custom programs for thousands of executives.

**LEADERSHIP TRAINING DELIVERY METHODS**

- Classroom training is offered and represented 75-100% of their leadership revenue in the last fiscal year.
- E-Learning programs are not offered, nor are stand-alone leadership training products or blended learning leadership programs/curricula.

**STANDARD INFORMATION FOR ALL PROGRAMS**

**Standard materials provided:** All instructional materials, including notebook, articles, books, handouts, reference materials.

**Standard way to measure program effectiveness and individual behavior change:** Written instructor and program evaluations.

**Languages in which programs are currently offered:** U.S. English

**Countries in which programs are currently offered:** U.S.

**PROGRAM INFORMATION**

**Executive Development Institute**

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**

- Strategic Thinking/Decision Making

**The secondary skills/competency areas addressed in this program are:**

- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Increasing Performance of Others/Performance Management

**Course description:** The Executive Development Institute (EDI) is designed for high-potential managers who, early in their careers, are emerging as the likely senior leaders of the future. This intensive management and leadership development experience provides an overview of the key functional and leadership elements on which effective strategic performance is built. The program provides an integrated picture of the role of executive leadership in guiding the enterprise as a whole. This program has been in existence since 1970. The date of last significant update/revision (defined as >=30% content revision) is 06/06/2002.

**Participant profile:** The audience includes High potential leaders and Mid-level managers.
Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Process & Manufacturing
- Government
- Utilities

Public Program: A two-week public program is available.
Prerequisites: Five years managerial experience

The program design includes the following components:
- Trainer/Consultant Presentation 35%
- Discussion 35%
- Group Activities/Role Plays 10%
- Case Studies 10%
- Simulation 10%

Pre-work/Post-work: Pre-work consists of reading assignments including articles, cases, and books. There is no post-work.

Total number of participants in the public, open enrolment version of this program last fiscal year: 31 - 95% of these participants reside in the U.S.

Finance for Executives

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen (Financial)

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Building Partnerships and Alliances

Course description: This program is designed to help senior-level managers better understand, deliver and measure economic performance, create value through financial strategy and use mergers, acquisitions and strategic alliances to drive long-term success. New Program in 2005

Participant profile: The audience includes Senior VPs, C-level executives, Directors and VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A three-day public program is available.
Prerequisites: This program is designed for managers in upper middle and senior positions, including CEO, direct report to CEO, VP and Executive Director.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

Pre-work/Post-work: Pre-work consists of reading assignments including articles and cases. There is no post-work.

Client-Sponsored Program: A client-sponsored program is not available.
Finance for Scientists

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen (Building Financial Skills of Scientists)

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Building Partnerships and Alliances
- Business Acumen
- Identifying financial requirements and assessing risks for business opportunities

Course description: In an era of rapid technological change, assessing the economic viability of new initiatives and investments is critical to the success of value-driven organizations. When several company proposals compete for finite capital resources, effective analysis and communication of financial rewards and risks is often a key driver of funding success. This seminar focuses on building the financial skills necessary to prepare persuasive financial strategies for corporate finance and senior management on funding large capital projects, external collaborations and new technologies. Participants learn how to identify financial requirements and assess risks of business opportunities and to communicate the value proposition to senior management using financial concepts. This program has been in existence since 2003. The date of last significant update/revision and (defined as >=30% content revision) is 06/30/2004.

Participant profile: The audience includes Directors, VPs and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Biotechnology

Public Program: A two-day public program is available.

Prerequisites: The seminar is designed for technical executives and scientist executives with responsibilities for new product development, R&D, strategic and project planning, budgeting, and monitoring and control of financial performance.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Case Studies 20%

Pre-work/Post-work: Pre-work consists of reading assignment, including cases, articles, and books. There is no post-work.

Total number of participants in the public, open enrolment version of this program last fiscal year: 15; all of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is not available.
Financial Analysis for Non-Financial Managers

*Modality:* Classroom training  
**The single most important skill/competency area addressed in this program:**
- Business Acumen (Financial - Developing skills in using financial information in making decisions)

**The secondary skills/competency areas addressed in this program are:**
- Developing skills in understanding annual reports, financial reports and budgets
- Communicating effectively about the firm’s financial position
- Interacting more effectively with the firm's financial managers

**Course description:** All successful managers come to a point in their careers when further advancements and promotions are contingent upon a specific set of crucial skills. The ability to understand, interpret and communicate effectively about financial information reflecting a firm’s short-term and long-term performance and survivability are such required skills. This seminar will be valuable to executives who have little, if any, training in finance. Managers in areas such as marketing, sales, manufacturing, R&D or human resources management, as well as general managers and other professionals who come frequently into contact with their firm's financial functions, are sure to benefit. This program has been in existence since 1994. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2000.

**Participant profile:** The audience includes Mid-level managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities

**Public Program:** A three-day public program is available.

**Prerequisites:** No

**The program design includes the following components:**
- Trainer/Consultant Presentation 50%
- Discussion 30%
- Group Activities/Role Plays 20%

**Pre-work/Post-work:** Pre-work consists of reading assignments including cases and background articles. There is no post-work.

**Total number of participants in the public, open enrolment version of this program last fiscal year:** 45; all of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is not available.

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Intellectual Property Management and Negotiations

*Modality:* Classroom training  
**The single most important skill/competency area addressed in this program is:**
- Creativity and Innovation (Understanding new developments in the law of intellectual property, patent law, and technology transfer)

**The secondary skills/competency areas addressed in this program are:**
- Conflict Resolution
- Communication Skills
- Developing negotiation skills for scientists in business
**Course description:** This program focuses on current issues in intellectual property, patent law, and technology transfer including the nuances associated with university/business research and development collaborations. It provides participants the opportunity to develop the negotiation skills that are needed for effectively managing intellectual property. There is a new program in development for delivery in June 2005.

**Participant profile:** The audience includes Directors, VPs and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Technology & Communications
- Chemicals
- Biotechnology

**Public Program:** A two-day public program is available.

**Prerequisites:** The program is designed for scientists or managers in scientifically oriented organizations who have input into their firms’ resource allocation decisions. These individuals need to develop strategic approaches to managing their science. They are likely to come from industries such as biotechnology, chemical, environmental, pharmaceutical, medical devices, health-related products or services, and veterinary or agricultural applications.

**The program design includes the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Case Studies 20%

**Pre-work/Post-work:** Participants are given articles, cases and books to read in advance of the program. There is no post-work.

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**Leadership Effectiveness Workshop**

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Motivating/Inspiring/Engaging Others

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation

**Course description:** Given our rapid and radically changing business environment, heightened competitiveness and reduced resources, it is critically important at all levels of the organization to maximize effectiveness of the most important asset of any firm - its people. This workshop, delivered around the globe in a variety of industries, is specifically designed to enhance this capacity. This program has been in existence since 1995. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2000.

**Participant profile:** The audience includes Mid-level managers and Supervisors and/or front-line managers.
Most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government

Public Program: A three-day public program is available.

Prerequisites: No

The program design includes the following components:

- Trainer/Consultant Presentation 40%
- Discussion 30%
- Group Activities/Role Plays 20%
- Case Studies 10%

Pre-work/Post-work: Reading assignments including articles and cases are given as pre-work. There is no post-work.

Total number of participants in the public, open enrollment version of this program last fiscal year: 48; all of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is not available.

Managing Innovation and R&D

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

- Creativity & Innovation

The secondary skills/competency areas addressed in this program are:

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- High Performing Teams
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances

Course description: This seminar addresses issues related to managing innovation in the context of a technology-based organization. It focuses on managing the innovation process, particularly as it relates to developing the technical base for new products and services. Faculty members and participants engage in lively discussion of how companies manage R&D – “The Good, The Bad and The Ugly!” illustrating the challenges inherent in the innovation management process. Participants are exposed to accepted practices and ideas that will help guide them in developing their own approach to managing innovation given their competitive landscape and corporate situation. The seminar covers four general areas: 1) organizational structure, 2) staffing and critical skills management, 3) innovation processes, and 4) strategy. This program has been in existence since 2003. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2003.

Participant profile: The audience includes all management levels equally.

Most common industries represented by clients purchasing this offering:

- Technology & Communications
- Healthcare
- Process & Manufacturing
- Biotechnology
- Chemicals

Public Program: A two-day public program is available.

Prerequisites: The program is designed for scientists or managers in scientifically oriented organizations who have input into their firms’ resource allocation decisions.
These individuals need to develop strategic approaches to managing their science. They are likely to come from industries such as biotechnology, chemical, environmental, pharmaceutical, medical devices, health-related products or services, and veterinary or agricultural applications.

**The program design includes the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

**Pre-work/Post-work:** Reading assignments, including articles, cases and books are given as pre-work. There is no post-work.

**Total number of participants in the public, open enrolment version of this program last fiscal year:** 14; all of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is not available.

### Marketing Essentials

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Business Acumen – Marketing (Understanding basic marketing concepts and techniques)

**The secondary skills/competency areas addressed in this program are:**
- Building a customer-focused organization
- Understanding customer behavior and competition
- Managing the marketing mix

**Course description:** Recognizing that the marketing function manages the interface between an organization and its markets and customers, it is important to understand that the complete purview of marketing includes many areas and activities not always considered. Marketing involves analyzing and understanding markets, customers and competitors; seeking and converting opportunities for growth; and managing the marketing mix (product, pricing, promotion and distribution). Effective marketing involves both art and science. Because marketing initiatives impact the success of the entire business, all managers should possess a basic understanding of marketing principles and how they work. An understanding of key marketing concepts and the role that marketing plays in the organization is critical to a manager’s ability to impact the firm’s growth and profitability. This program focuses on basic marketing concepts and techniques related to building a customer-focused organization, understanding customer behavior and competition, and managing the marketing mix. This program is new in 2005.

**Participant profile:** The audience includes Directors, VPs, Mid-level managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** A three-day public program is available.

**Prerequisites:** No
The program design includes the following components:

- Trainer/Consultant Presentation 35%
- Discussion 35%
- Group Activities/Role Plays 15%
- Case Studies 15%

**Pre-work/Post-work:** Reading assignments, including articles, cases, and books are given as pre-work. There is no post-work.

**Client-Sponsored Program:** A client-sponsored program is not available.

### Marketing Metrics: Managing Marketing to Drive Shareholder Value

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Business Acumen – Marketing (Designing and implementing marketing metrics for performance and profitability)

**The secondary skills/competency areas addressed in this program are:**
- Understanding the Marketing/Finance Interface
- Managing Customers and Brands as Assets
- Measuring and tracking the financial returns to various marketing initiatives

**Course description:** What does the big picture of marketing look like? How do you measure and track the financial returns to various marketing initiatives, including advertising, direct marketing, pricing promotions, loyalty programs and sales force expenditures? How can you apply financial concepts to make a stronger case for a variety of marketing initiatives? The answers to these questions and others will provide you with a new set of tools to evaluate and justify your sales and marketing plans. There are many forces in today’s marketplace, including increased uncertainty and pressure for short-term results. More than ever, marketing managers must be able to demonstrate the financial returns on their marketing initiatives. This two-day program will cover the frameworks and tools that will help you design and implement marketing metrics and programs that enhance your organization’s performance and profitability in today’s highly competitive marketplace. This program was new in 2005.

**Participant profile:** The audience includes Directors, VPs, Mid-level managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** A public program is available. **Client-Sponsored Program:** Contact UNC for details on the new client-sponsored program.

### Marketing Strategies for Growth

*Modality:* Classroom training

**The single most important skills/competency areas addressed in this program is:**
- Business Acumen (marketing)
- Building frameworks to identify differentiation and growth opportunities

**The secondary skills/competency areas addressed in this program are:**
- Managing successful new product development
- Increasing successful new product launch
Course description: As markets become more competitive and products more commoditized, how can you systematically identify differentiation and growth opportunities? What drives customer choice between competing products and services and how can you influence that choice? How do you move from providing products and services to providing solutions for customers? These are just a few of the questions for which you need answers to grow profitably in today’s business environment. Many organizations cite growth as the major challenge they now face. For the business to grow, you must know how to seek out and convert profitable differentiation and growth opportunities in your market. This program focuses on the frameworks that will help you identify these types of critical opportunities, understand how consumers choose between competing offerings, shape ideas into winning products and services, and successfully bring those products and services to market. This program was new in 2005.

Participant profile: The audience includes Directors, VPs, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

PUBLIC PROGRAM
A four-day public program is available. Prerequisites: None

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

Pre-work/Post-work: Reading assignments including cases, articles and books are given as pre-work. There is no post-work.

Client-Sponsored Program: A client-sponsored program is not available.

Negotiation Skills for Effective Managers

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Communication (negotiation) skills

The secondary skills/competency areas addressed in this program are:
- Conflict Resolution
- Communication Skills
- Dealing with Ambiguity

Course description: Interpersonal skills are increasingly essential to success in the business and professional world. Of these skills, none is more vital than the ability to negotiate effectively. This is particularly so as one moves into the ranks of midlevel management and beyond. In fact, most senior level executives spend virtually all of their time negotiating in one fashion or another. Accordingly, it is vital to all business and professional people that they assess, develop and improve their negotiation skills. This seminar will be valuable to junior and mid-level executives and professionals who have had little, if any, formal negotiation training. It will be particularly valuable to mid-level managers who want to improve their negotiation skills in order to position themselves for advancement. Because negotiation theory undergoes constant refinement, managers...
who have not taken a negotiation seminar in the past 5-plus years should also find the material in this seminar to be extremely helpful. This program has been in existence since 2002. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2003.

**Participant profile:** The audience includes Mid-level managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance  
- Technology & Communications  
- Process & Manufacturing  
- Professional Services  
- Government

**Public Program:** A two-day public program is available. **Prerequisites:** None

**The program design includes the following components:**
- Trainer/Consultant Presentation 35%  
- Discussion 35%  
- Group Activities/Role Plays 30%

**Pre-work/Post-work:** Articles and books are given for pre-work. There is no post-work.

**Total number of participants in the public, open enrolment version of this program last fiscal year:** 30; all of these participants reside in the U.S.

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**Senior Executives Institute**

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Strategic Thinking/Decision Making

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style  
- Problem Analysis/Problem Solving  
- Setting and Achieving Goals  
- Communication Skills  
- Leading/Sponsoring Change Efforts  
- Creativity and Innovation  
- Thinking Globally

**Course description:** The Senior Executives Institute (SEI) is designed for senior managers with multifunctional responsibilities. SEI is particularly valuable for successful managers who are facing or leading fundamental changes in their markets or organizations. It is also a unique environment for executives who wish to gain perspective and understanding of leadership, measurement, communication and governance within complex organizations facing complex issues. This program has been in existence since 1953. The date of last significant update/revision (defined as >=30% content revision) is 08/01/2003.

**Participant profile:** The audience includes Senior VPs, C-level executives, Directors and VPs.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance  
- Technology & Communications  
- Healthcare  
- Process & Manufacturing  
- Retail, Hospitality  
- Professional Services  
- Government  
- Utilities

**Public Program:** A public program is available for a four week period spaced over four months.
Prerequisites: 15 years of managerial experience is a prerequisite for this program.

The program design includes the following components:
- Trainer/Consultant Presentation 35%
- Discussion 35%
- Group Activities/Role Plays 10%
- Case Studies 10%
- Simulation 10%

Pre-work/Post-work: Reading assignments including cases, articles and books are given for pre-work. There is no post-work.

Total number of participants in the public, open enrollment version of this program last fiscal year: 11; all of these participants reside in the U.S.

Strategic Leadership Workshop

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management

Course description: Today’s executives face significant leadership challenges, including an increasingly competitive marketplace, a relentless surge of globalization, and heightened scrutiny from shareholders. This program offers a unique, integrated approach to leadership and strategy, providing strategic leadership skills that help executives and their organizations succeed. Learning, transformation, and execution will be among the key themes, tying together the individual concepts and tools. In this hands-on workshop, participants will develop a structured action plan for strategic leadership, including methods for developing leaders in their organizations, building successive waves of competitive advantage, and initiating and leading change in the global environment. Thus this course goes beyond conceptual learning to help participants immediately apply what they have learned in their own organizations. This program has been in existence since 2003. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2004.

Participant profile: The audience includes Senior VPs, C-level executives, Directors and VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Process & Manufacturing
- Government

Public Program: A three-day public program is available. Prerequisites: No

The program design includes the following components:
- Trainer/Consultant Presentation 20%
- Discussion 30%
- Exercises/Quizzes 30%
- Group Activities/Role Plays 20%
Pre-work/Post-work: Reading assignments including articles, books and a 360-degree assessment is given for pre-work. There is no post-work.

Total number of participants in the public, open enrolment version of this program last fiscal year: 20; all of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available.

The Business of Human Resources

Modality: Classroom training

The single most important skill/competency area addressed in this program:
- Business Acumen

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Building Partnerships and Alliances
- Financial Reporting and Analysis
- Marketing in the Modern Firm
- Technology and Business Innovation

Course description: This intensive and practical program focuses on the business knowledge and skills that are needed to become effective business partners. Program participants will develop business knowledge and skills in areas such as strategy, accounting, finance, operations, information management and marketing. The program is designed to equip human resource executives with the business language and concepts required to operate in today's evolving business arena. This program has been in existence since 1999. The date of last significant update/revision (defined as >=30% content revision) is 06/30/2003.

Participant profile: The audience includes Mid-level managers and High potential leaders.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A four-day public program is available.

Prerequisites: Participants must be in a Human Resource function.

The program design includes the following components:
- Trainer/Consultant Presentation 35%
- Discussion 35%
- Group Activities/Role Plays 15%
- Case Studies 15%

Pre-work/Post-work: Reading assignments including articles, cases and books are given for pre-work. There is no post-work.

Total number of participants in the public, open enrolment version of this program last fiscal year: 55; 97% of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is not available.
Learning Technologies, Inc. (LTI)

5206 Duraleigh Road  
Raleigh, NC 27612  
919-783-6900  
http://www.lticorp.com

Sales contact:  
919-783-6900

FINANCIAL PROFILE
Ownership/Funding: Privately held
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%
Profitability based on last fiscal year: GAAP profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 5
Total number of employees delivering training solutions based in U.S: 2
Total number of certified contractors delivering leadership training solutions:
Based in U.S.–30; Internationally–2
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions: Most trainers have post-graduate degrees. One of the main requirements is that they have a strong business background as this helps them better relate to the issues clients are facing. It also ensures that our programs are not just theoretical, but focused on applications. They also need to be very experiential and entertaining in the classroom. After consultants are observed, they are put through LTI training to ensure they understand the philosophy and way of doing business.
Total number of developers of leadership training solutions: 4

ORGANIZATION TENURE
Years in business: 15-19; Years as a leadership training vendor: 15-19 years

CLIENT PROFILE
Number of client companies who purchased their training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 50
Percentage of these client companies listed in the Fortune 500: 50%
Top 5 client companies:
1. Procter & Gamble
2. Accenture
3. Boston Scientific
4. John Deere
5. Progress Energy

COMPANY PROFILE
Customer Service infrastructure/philosophy: At LTI the client is the number one focus - from the initial sale, to professional program management, to the consultants who deliver the programs, back to sales for ongoing follow up. They work to help clients meet their needs and do whatever it takes. LTI is frequently told they go above and beyond to make sure their programs are a success. LTI does not provide client forums or use advisory boards.
Leadership Development Philosophy: Leadership is empowering people with the authority and the responsibility to not only get the job done, but also to strive toward continuous improvement. It involves understanding others’ perspectives and managing conflict to promote win-win outcomes. True leadership encourages others to be their own leaders.
best and to see learning as an ongoing process. True leaders model the way and inspire others to be their best. LTI's goal is to help you build better leaders.

The three aspects of a leadership program design most important to its success and effectiveness are:

1.) Management involvement on both the front end and with follow-up. LTI pushes their clients to identify exactly what they want to accomplish with any training. LTI works with them to clarify those goals and help tie them to their business needs. They can also help clients develop an overall training strategy so their program is not just another "flavor of the month." They work to involve managers in the training process and in the actual classes. Their involvement and awareness of lessons learned is invaluable to their being able to support the training afterwards. Finally, they provide numerous follow-up tools afterwards to help managers keep up the momentum and reinforce lessons learned.

2.) Customization to best meet the client's specific business goals. Once LTI identifies the client's goals, they work to ensure the training fits the corporate culture and company philosophy. LTI spends time with their people to make sure they have a good idea of situations that they are dealing with and what they want to get out of the training. They then design a program to meet those needs and customize materials, program flow, case studies, and activities specifically for them.

3.) Experiential interaction in the classroom to keep participants involved in the learning process. Adults learn better by being involved. LTI designs programs to keep participants active and not just listening passively to a lecturer. They use the adult learning model as a basis for much of their design. They also make sure they have included different types of learning opportunities to meet different learning styles.

LEADERSHIP TRAINING DELIVERY METHODS

Classroom training is offered. There are 20 client-sponsored, different (distinct) leadership classroom programs currently offered to clients. Classroom training represented 50-74% of their leadership revenue in the last fiscal year. E-Learning programs are not offered, nor are there any stand-alone leadership training products.

Additional information/comments: One of their clients said it best. “LTI may not be the cheapest, but they are the best value. Their strengths are twofold. They have the depth of experience and expertise to provide some of the most professional training in the industry. They also treat every client with personalized attention, knowing that they all have their own specific needs and that the details matter.”

### PROGRAM INFORMATION

**Assessing Your Leadership Skills**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:

- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts

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Course Description: Participants evaluate themselves in key areas of performance. They also receive input from their subordinates, superiors, and peers on how their performance is perceived. Specific suggestions for improvement and development are made, and participants create their own specific action plans for change. The Management Effectiveness Profile System is a 360-degree feedback instrument that focuses on mid- to upper-level managers. It identifies 15 work-related areas, which are critical for this level of management. This program has been in existence since 1996. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2003.

Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.

Pre-assessments: Management Effectiveness Profile System

This program is broken down into the following components:

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessment 10%

Pre-work/Post-work: Pre-work consists of the Management Effectiveness Profile System. There is no post-work involved.

Communicating Effectively Within Your Organization

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Communication Skills.

The secondary skills/competency areas addressed in this program are:
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances

Course description: Participants will learn the relevance, benefits, and need for effective listening as well as the necessary skills to be an active listener. Overcoming barriers to clear communication is also discussed. Activities are used throughout to reinforce the learning. This program has been in existence since 1992. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2004.

Participant profile: The primary audience includes Directors, VPs, Mid-level managers, Supervisors and/or front-line managers and High potential leaders. The secondary audience includes Senior VPs and C-level executives.
This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessments 10%

Customization: All programs are customized to meet the specific needs and desired objectives of clients. The completely customized version requires in-depth company information to incorporate into the design. This includes company specific program topics, case studies, and activities.

Pre-assessments: Not available

Prerequisites: No

Pre-work/Post-work: There is no pre-work involved. Post-work varies as the program is customized.

Additional information: This highly interactive program will help participants learn the relevance, benefits, and need for effective listening as well as the necessary skills to be an active listener. Overcoming barriers to clear communication is also discussed. The program can be customized to integrate specific cases within the client’s corporate culture. Their unique activities place participants in situations that will model their actual workplace and provide the opportunity to practice their newly acquired skills to reinforce the learning.

Delegating Effectively

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Improving the Performance of Others/Performance Management

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Coaching Skills
- Building Positive Relationships with Others
- Talent Management (Recruiting/Retaining/Developing Others)
- Delegation Skills

Course description: Competent delegation skills can dramatically improve your ability to develop other members of the team. Participants learn how to develop their people through delegation and the difference between a manager and a coach. This program has been in existence since 1999. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2003.

Participant profile: The primary audience includes Directors, VPs, Mid-level managers and Supervisors and/or front-line managers. The secondary audience includes Senior VPs and C-level executives.

This program is broken down into the following components:
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
Pre-assessments: Not available
Prerequisites: No
Pre-work/Post-work: There is no pre-work involved. Post-work varies because the program is customized.
Duration: 1 day typically.

Developing Your Leadership Practices
Modality: Classroom training

The single most important skill/competency area addressed in this program is:

The secondary skills/competency areas addressed in this program are:
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others

Course description: The Leadership Practices Inventory (LPI) is a tool by which leaders can increase their level of awareness about their own leadership preferences. This program has been in existence since 1998. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2002.

Participant profile: The audience includes Senior VPs, C-level executives, Directors, VPs, and Mid-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 30%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%
- Assessment 10%

Customization: To better address specific client or topical needs, LTI customizes LPI reports to provide more targeted and relevant information. This maximizes the goal focus and application of concepts back into the workplace.

Pre-assessments: Available for participants.
Prerequisites: No
Pre-work/Post-work: Pre-work consists of the Leadership Practices Inventory. Post-work varies as it is customized for each client.

Reinforcement/Follow-up options and associated costs: Electronic or hard copy reinforcement material and Individual one-on-one follow-up. Costs vary.

Standard way to measure program effectiveness and individual behavior change: Level 1 and Level 2 Program Evaluation.

Additional information: This program offers a powerful way to identify and apply critical leadership skills.
DiSC Personality Profile

*Modality:* Classroom training

*The single most important skill/competency area addressed in this program is:*

- Communication Skills.

*The secondary skills/competency areas addressed in this program are:*

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Conflict Resolution
- Building Positive Relationships with Others
- Appreciating Diversity
- Dealing with Ambiguity

*Course description:* Through this nationally recognized confidential assessment, participants will go beyond identifying their individual behavioral preferences to understanding how different personalities interact. The group seeks to understand how their differences in behavior affect their interactions with both clients and colleagues. Emphasis is placed on communication, interpersonal interaction, conflict resolution, and problem-solving techniques. This program has been in existence since 1993. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2001.

*Participant profile:* The primary audience includes Directors, VPs, Mid-level managers, Supervisors and/or front-line managers and High potential leaders. The secondary audience includes Senior VPs and C-level executives.

*This program is broken down into the following components:*

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessment 10%

*Customization:* Every program is customized and varies in both content and length. This program can be delivered in 1/2 day or 1 day, and includes minimal lecture, the DiSC assessment, group discussions, and interactive activities. This program incorporates the DiSC personality profile, and is customized to emphasize clients’ corporate leadership, culture, values, and desired needs and objectives.

*Pre-assessments:* Available for participants. DiSC Personality Profile.

Effective Coaching Skills

*Modality:* Classroom training

*The single most important skill/competency area addressed in this program is:*

- Coaching Skills

*The secondary skills/competency areas addressed in this program are:*

- Assessing/Developing Your Personal Leadership Skills/Style
- Motivating/Inspiring/Engaging Others
- Conflict Resolution
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

*Course description:* Effective Coaching Skills can dramatically improve one's ability to work with other members of the team, as well as with peers and superiors. We examine...
ways for the individual to improve their success in their specific environment. This program has been in existence since 1996. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2002.

**Participant profile:** The audience includes Senior VPs, C-level executives, Directors, VPs, Mid-level managers and Supervisors and/or front-line managers.

**This program is broken down into the following components:**
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessments 10%

**Pre-assessments:** Available for participants. The Coaching Skills Inventory is designed to assess the ability of a manager or supervisor to recognize when and how to use the skills necessary for conducting effective coaching meetings.

**Prerequisites:** No; **Pre-work/Post-work:** Pre-work consists of the Coaching Skills Inventory. There is no post-work. **Maximum number of participants:** 20 - number of trainers/consultants required is 1 for every 20 participants.

**Duration:** 1-1½ days. Ongoing one-on-one executive coaching is available.

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**Five Factor Leadership Profile**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program are:**
- Coaching Skills
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Appreciating Diversity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

**Course description:** The Five Factor Profile (NEO PI-R) is a highly valid and reliable means of assessing personality and work behaviors. The profile uses common words to describe a specific aspect or trait of our personality. Through factor analysis these characteristics are summarized into five categories - Negative Emotionality, Extraversion, Openness, Agreeableness, and Conscientiousness. This program has been in existence since 1998. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2004.

**Participant profile:** The audience includes Senior VPs, C-level executives, Directors, VPs, Mid-level managers and Supervisors and/or front-line managers.

**This program is broken down into the following components:**
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 30%
- Group Activities/Role Plays 15%
- Assessment 15%
Customization: Every program is customized and varies in both content and length. This program can be delivered in 1/2 to 1 day, and includes minimal lecture, group discussions, and interactive activities. This is an excellent component/topic to be used in conjunction with other topical sessions or teambuilding. To better address specific client or topical needs, LTI customizes Five Factor reports to provide more targeted and relevant information. This maximizes their goal focus and application of concepts back into the workplace.

Pre-assessments: Available for participants at a cost of $60 - $75.

Prerequisites: No

Duration: Client-sponsored program can be either ½ day or 1 day. Train-the-trainer programs and program licensing are not available.

Pre-work/Post-work: There is no post-work involved.

Standard materials provided: Includes a personal in-depth profile

Additional information: The Five Factor Profile is a highly valid and reliable means of assessing personality and work behaviors. Each of the five factors is broken down into six specific facets to give more specific and meaningful information to each factor. Detailed work behaviors can also be examined.

Inspiring Commitment

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Motivating/Inspiring/Engaging Others

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- High Performing Teams
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management

Course description: In today’s world, leadership is a greater challenge than ever before. To inspire commitment, a leader must be able to proactively lead people through change, share and gain commitment to the company’s vision, and build trust in an environment of open communication. All of this needs to be done, even though people may already be stressed and skeptical. This program will help managers look at how they can build trust and commitment, and actively inspire their groups in these changing times. This program has been in existence since 1997. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2001.

Participant profile: The primary audience includes Directors, VPs, Mid-level managers, Supervisors and/or front-line managers and High potential leaders. The secondary audience includes Senior VPs and C-level executives.

This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessments 10%
Customization: Every program is customized and varies in both content and length. This program can be delivered in 1/2 to 1 day, and includes minimal lecture, group discussions, and interactive activities.

Pre-assessments: Not available

Prerequisites: No

Maximum number of participants: Up to 20

Number of trainers/consultants required: 1 for up to 20 Participants

Pre-work/Post-work: There is no pre-work required. Post-work varies as it is customized for the client.

Managing Change in an Ever-Changing World

Modality: Classroom training

The single most important skill/competency area addressed in this program is:

- Leading/Sponsoring Change Efforts

The secondary skills/competency areas addressed in this program are:

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Business Acumen

Course description: Participants learn not only how to deal with change, but also how to manage others in an ever-changing environment. Participants explore how to become more resilient to change and how to view change as an opportunity rather than a threat. The focus is on specific skills and attitudes needed to remain productive during changing times. Also explored are personal change style (how we react to change), the different types of change, and how to manage through each of these stages. This program has been in existence since 1998. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2001.

Participant profile: The audience includes all management levels equally.

This program is broken down into the following components:

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Assessments 10%

Customization: Every program is customized and varies in both content and length.

Pre-assessments: Available for participants. Pre-work/Post-work: No pre-work is required. Post-work varies, depending on the customized program.

Leadership Agility

Modality: Classroom training

The single most important skill/competency area addressed in this program is:


The secondary skills/competency areas addressed in this program are:

- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Coaching Skills
- Building Positive Relationships with Others
• Leading/Sponsoring Change Efforts
• Appreciating Diversity
• Talent Management (Recruiting/Retaining/Developing Others)

Course description: The nationally recognized Situational Leadership® Model is used to help managers see how to balance direction with support. The concept of the model is that each individual employee has a different set of needs based on their level of development. These needs can be categorized as Directive Needs (“tell me what to do”) versus Supportive Needs (“trust what I am doing”). This program has been in existence since 1995.

Participant profile: The audience includes Senior VPs, C-level executives, Directors, VPs, Mid-level managers and Supervisors and/or front-line managers.

This program is broken down into the following components:
• Trainer/Consultant Presentation 20%
• Discussion 20%
• Exercises/Quizzes 10%
• Group Activities/Role Plays 20%
• Case Studies 20%
• Assessments 10%

Customization: Every program is customized and varies in both content and length. This program can be delivered in 1/2 to 1 day, and includes minimal lecture, group discussions, and interactive activities.

Pre-assessments: Available for participants.
Prerequisites: No
Maximum number of participants: 20
Number of trainers/consultants required: 1 for up to 20 participants

Additional information: Situational Leadership provides participants with the knowledge and understanding to assess the performance of others and take ownership of making things happen.

Strategic Planning

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
• Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program are:
• Setting and Achieving Goals
• Creativity and Innovation
• Thinking Globally

Course description: Strategic planning sessions are totally customized and facilitative in nature. They often cover a wide range of topics but are always focused on your specific needs. LTI works closely with you and your management teams to make sure that the outcomes are directly aligned with, and address your business needs. This program has been in existence since 1995. The Date of the last significant update/revision (defined as >=30% content revision) is 01/01/2001.

Participant profile: The audience includes Senior VPs, C-level executives, Directors, VPs, Mid-level managers and Supervisors and/or front-line managers.
This program is broken down into the following components:

- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%

**Customization:** Every program is customized and varies in both content and length. This program can be delivered in 1/2 to 1 day, and includes minimal lecture, group discussions, and interactive activities.

**Pre-assessments:** Not available; **Prerequisites:** No

**Pre-work/Post-work:** There is no pre-work required; post-work varies depending on customer need.

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**Walk the Talk**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Problem Analysis/ Solving + Strategic Thinking/Decision Making + Planning

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Dealing with Ambiguity

**Course description:** This unique program focuses on direct application by bridging the gap between concept and implementation. It involves a business simulation requiring leadership at multiple levels across multiple teams. While a typical training activity can promote discussion and interaction, Walk the Talk creates an all-encompassing environment in which participants can apply, practice and refine critical skills. The business similarities include recognizing the balance between managing profitability and employee development, tracking and reporting key metrics, strategic and tactical decision-making, and leadership at multiple levels, personal responsibility, and self-governance. This program has been in existence since Spring 2003.

**Participant profile:** The audience includes all management levels equally.

**This program is broken down into the following components:**
- Trainer/Consultant Presentation 10%
- Discussion 20%
- Simulation 70%

**Customization:** There is limited customization for this program because of a semi-standard design for sales and manufacturing. LTI strives to integrate with company specific information as much as possible.

**Pre-assessments:** Available for participants. **Prerequisites:** No

**Duration:** 2-Day Program
Maximum number of participants: 20
Delivery options: Trainers/consultants deliver this program; there is no co-facilitation with client trainers or train-the-trainer programs or program licensing.
Total number of participants in the client-sponsored version of this program last fiscal year: 350; 100% reside in the U.S.
Lee Hecht Harrison - Leadership Consulting
235 Pine Street, Suite 1475
San Francisco, CA 94104
415-616-4217
http://www.lhh.com

Sales contact:
Kevin Gagan, SVP, Global Head of Business Development
415-616-4204
kevin_gagan@lhh.com

Additional office locations:
180 offices around the world

FINANCIAL PROFILE
Ownership/Funding: Public company; Lee Hecht Harrison is part of the Adecco Group (ADO); For-profit
Mergers/Partnership/Formal Alliance Activity: N/A
Annual fiscal revenue: 2 Years Ago - $75 million+; Last Fiscal Year - $75 million+
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.:
16-20%
Profitability based on last fiscal year: GAAP profitable; EBITDA profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 1,800
Total number of employees delivering leadership training solutions:
Based in U.S – 130; Based Internationally – 50
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions: LHH Leadership Consulting certification plus significant academic and professional accomplishments in the fields related to assessment and development.

ORGANIZATION TENURE
Years in business: 20+; Years as a leadership training vendor: 5 - 9 years

CLIENT PROFILE
Number of client companies who purchased leadership training solutions last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 150

COMPANY PROFILE
Customer Service infrastructure/philosophy: A corporate team based in San Francisco manages LHH Leadership Consulting. This corporate team manages all strategy, research, product development and quality assurance for global delivery. Their global and local business is managed in the field by a network of Global Leadership Specialists (GLS) and Regional Leadership Specialists (RLS). These teams manage the business development, solution delivery, quality assurance and customer service directly with customers. The corporate team, GLSs, and RLSs all work closely to ensure the quality of their services and to meet or exceed clients’ expectations. Client forums or advisory boards are not used.

Leadership Development Philosophy: Effective leadership development needs to involve both behavior change and business results that can be sustained over time. Leadership development needs to address requirements at multiple levels within a company, organization, group and individual, in an integrated way. Without this integration, leadership development approaches and investments will not be sustained.
The leadership consulting practice is focused on developing superior leaders who create positive impact through driving business results and creating an environment for leadership development throughout their organizations. They work with clients to address leadership needs at multiple levels of their companies: - Organization Level - to create leadership alignment and consistency; Group Level - to build an agile, learning organization; Individual Level - to achieve sustained behavior change

**The three aspects of a leadership program design that are most important to its success and effectiveness are:**

1.) **Behavior Change** - Effective leadership development must go beyond learning new skills or techniques to focus on one's own leadership behaviors;
2.) **Business Results** - New leadership skills, techniques and behaviors must drive new business outcomes. These outcomes or results must be quantifiable; and
3.) **Integrated Requirements (Organization, Group, and Individual)** - To achieve behavior change and business results in a leadership development context, a company must recognize three levels of requirements: 1.) Individual Level - Where behaviors are rooted, 2) Group Level - Where behaviors are demonstrated and employed, and 3) Organization Level - where behaviors are reinforced through systems. For leadership development approaches to be effective in achieving sustained business results over time, all three levels of requirements need to be addressed in an integrated, programmatic manner.

Classroom training is offered.

**Program Information**

**Coaching Practices for Leaders**

*Modality: Blended learning*

**The single most important skill/competency area addressed in this program is:**

- Coaching Skills.

**The secondary skills/competency areas addressed in this program are:**

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Communication Skills
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances

**Overall description of curriculum:** Organizations need strong leadership and optimal performance from employees at all levels, particularly in today's rapidly changing and highly competitive business environment. Lee Hecht Harrison's Coaching Practices for Leaders (CPL) assists organizations in developing these capabilities by educating leaders on how to develop their people with the use of coaching conversations. The process complements each organization's leadership development initiatives by building sustainable bench strength performance. Lee Hecht Harrison’s CPL program is customized to align with each organization’s culture, specific leadership and business initiatives. It combines a 1 day customized seminar with follow-up individual coaching for each participant. A half-day seminar where participants fine-tune their leadership coaching strategies concludes the process. CPL reinforces an organization's ability to develop agile leaders who are prepared to develop others and lead their business into the future.
Coaching Practices for Leaders (CPL) and its related, more advanced program, Coach the Coach (CTC) have been offered as development programs from LHH for over seven years. It was originally piloted for GE, and has since been implemented in organizations from consumer products, to healthcare to public relations and advertising. The date of the last significant update/revision (defined as >=30% content revision) is 03/30/2004.

**Participant profile:** The primary audience includes VPs/Directors, Mid-level managers and High potential leaders. The secondary audience includes Senior VPs/C-level executives.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Consumer Products

**DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM**

**Component 1 - Interviews with Key Participants**
**Description:** One to one interviews and/or focus groups. Content and design interviews prior to facilitated session to customize coaching conversations and techniques to organization’s business and management situations. Relevant selection and use of coaching practices and techniques will be selected and part of the customized section of this program for each company and level of manager session.

**Duration:** One to two weeks; **Stand-alone available:** No

**Component 2 - Coaching Practices for Leaders Facilitated Session**
**Description:** Classroom - highly interactive. This is a one-day facilitation of the general learning of what coaching is, what it is not, how to identify applications for having coaching conversations on-the-job with those who participants are responsible for; to develop and practice during the session with up to three techniques per day.

**Duration:** 1 day. There are options to extend this single day to two days depending on organizational needs. **Stand-alone available:** No

**Component 3 - LHH Shadow Coaching**
**Description:** One to one in person and/or telephone coaching. These are individual coaching sessions with an LHH coach to coach the participants in their preparation, delivery and debrief of on-the-job coaching conversations, and their practice in using specific coaching techniques.

**Duration:** 2, 4 or 6 months, depending on level of program contract. **Stand-alone available:** No

**Component 4 - CPL Coaching Circle – Conclusion**
**Description:** Classroom training (highly interactive). Purpose is to debrief on practice of coaching techniques and conversations that have been occurring on-the-job with a facilitating LHH coach. Participants prepare overview presentations or discussions regarding their learning and share ideas, suggestions, best practices. At this session, coaching circles are established to continue peer learning and reinforce the new coaching culture at the organization.

**Duration:** ½ day; **Stand-alone available:** No

**Prerequisites:** While there are no formal prerequisites for this program, an organization that does not value or have experience with coaching or developing subordinates in any formal way may not have the orientation to invest the time in these practices. Also, if a manager who does not have any responsibility to develop others attends this course, they will not receive the same benefit of application. Individual contributors can attend, but will use the language and the applications differently than those who are coaching staff or peers.
Cost of this curriculum/offering (provide volume tiers as appropriate): Pricing is based on length of program selected and amount of customization.

Customization: There is limited customization. The most effective use of coaching practices on the job is in context of an organization's leadership model and their development challenges on-the-job. It is this recognition that differentiates this training from most coaching training on the market.

Pre-assessments: While pre-assessments are not part of the standard CPL curriculum, if an organization is using a management or leadership assessment, and would like the results of that integrated into the learning approach for coaching, it can be done.

Languages in which this blended curriculum is currently offered: U.S. English and U.K. English

Countries in which this blended curriculum is currently offered: U.S., Australia, Europe, if in English. Translation based on demand.

Top competitive offerings: LHH is unaware of any programs designed with this methodology. Typical competitive offerings are through universities or not for profit organizations and are classroom only or optional follow on coaching.

Standard materials provided with curriculum: Each participant receives a Coaching Practices for Leaders manual and summary cards of the techniques learned in that program. Other materials are optional: assessments, additional customized materials with organization's leadership and development models.

Optional materials available and associated costs: Any number of materials from the organization that they feel are relevant to the context of the coaching is welcome, from leadership models, to values and mission to additional resources. Costs would depend on design or production needs.

Reinforcement/Follow-up options and associated costs: The design of this program includes reinforcement and follow up. LHH does not believe that you can learn coaching techniques or practices through a traditional classroom or online setting only. It is through the "practice" of using the language, applying the skills and techniques on-the-job, where sustained coaching learning occurs.

Standard way to measure program effectiveness and individual behavior change: Evaluations are received from all participants and decision makers for the program. LHH coaches’ feedback on learning after shadow coaching; half day closure program to cite how individuals have modified behaviors when having coaching conversations with employees and any employee behavior change cited in response to the coaching techniques. They can also design evaluations or measurement criteria at the front end of the program.

Other measurement options: LHH believes that return on investment should be designed into every learning opportunity, both for the individual and the business. They contract very specifically up front in any CPL or individual coaching engagement for what success looks like, what behaviors will change, how they will be noticed and what the outcome will be that can be measured. So, if an organization is looking for specific behavior changes in those attending the CPL program, or of those who will be coached, then they will identify those with the organization up front in the interview and discovery process.

Delivery options: Trainers/consultants deliver program and co-facilitation with client trainers.

Maximum number of participants: 15, however highly recommended at 12 participants for maximum coaching support

Number of trainers/consultants required: Minimum of 2
Co-facilitation with client trainers; maximum number of participants: 15
They do not support client trainers to co-facilitate until they have attended a session themselves as participants, and also are approved by LHH facilitators as having both facilitation and coaching expertise, as a strong trainer/facilitator who does not have coaching experience cannot teach others how to coach. However, with a planned series of sessions for an organization, once the appropriate client trainers have been identified and attend a session, then they can look at how they can participate to facilitate and shadow coach future groups.

Number of your trainers/consultants required: A minimum of 1, but 2 are recommended for the initial sessions.

TRAIN-THE-TRAINER PROGRAMS AND PROGRAM LICENSING

Duration of classroom training: Initial session - 1 day; Conclusion session - 1/2 day

The program format is broken down into the following components:

- Trainer/Consultant Presentation 15%
- Discussion 35%
- Group Activities/Role Plays 50%

Pre-work/Post-work: For each participant, after interviews with selected groups are complete, each person is asked to identify at least one person who they will be practicing using the coaching techniques with, typically a subordinate. When in the initial session of CPL, they will use this person as reference and example during role plays. Post-work: Each participant is required to practice with the support of a "behind the scenes" LHH coach for the duration of the program contracted for: 2, 4 or 6 months. They must then attend the half-day conclusion session with a report/presentation of examples of when and how they used the practices on-the-job, and their learning’s.

Name of coaching solution: The "shadow coaching" sessions with an LHH coach for each participant are a core part of the curriculum.

Description of coaching intervention and its purpose: Learning how to have coaching conversations at work with those one is responsible to manage and develop takes practice. We believe that learning "how" to coach takes experience, not just knowledge, and without the follow on coaching we have integrated into CPL, the learning would be event driven and not able to be sustained. Experiential learning is a cornerstone of all our curricula. So the coaching that is part of CPL starts in the initial session, during the role plays, then continues during the follow on individual sessions to reinforce the learning and practice of techniques, and is finally sustained in the half day debrief and establishment of client coaching circles.

Standard number of coaching sessions per participant: The number of coaching sessions per participant depends on the length of CPL program contracted for: 2 month - up to 6 sessions; 4 months - up to 12 sessions; 6 months - up to 18 sessions.

Standard duration of each coaching session: Sessions range from 30-60 minutes in length.

Recommend or average frequency of contact: Typically the coaching sessions are three times a month, or once every 10 days or so. There is much flexibility in the timing of the sessions, as they are most helpful to the participants when they can occur as they need them in preparing or debriefing their own coaching conversations on-the-job.

Percentage of coaching delivery through:

- Face-to-Face Meeting 20%
- Phone Conversations 60%
- Email 20%
Core, Edge & Agility Seminar and Follow-up Coaching

**Modality:** Blended learning

**The single most important skill/competency area addressed in this program is:**

**The secondary skill/competency areas addressed in this program is:**
- Developing the skill of Agility to help leaders manage through contradiction and paradox

**Overall description of curriculum:** LHH’s proprietary leadership framework, Core, Edge & Agility, provides the foundation for a blended learning experience for leaders at all levels to recognize the importance or paradox and contradiction in their working environments and how their own personal leadership behaviors need to move along a continuum of behaviors to be effective. The leadership framework, Core, Edge & Agility, is based on research they have done with senior executives around leadership behaviors and the notion of paradox. The framework recognizes that leaders must operate amid contradiction and paradox at all time. From a leadership behavior perspective, this means moving continually between the "known" or the Core and the "unknown" or the Edge. Each leader has a natural inclination to lead from either a Core or Edge perspective and their own personal skill of agility is what enables them to move along this continuum from Core to Edge as appropriate to achieve a business result and to maximize their leadership effectiveness. Research suggests that the most effective leaders are proactive and intentional about selecting not only behaviors but also either the Core or Edge orientation that is most appropriate to achieve a particular business result for a given set of circumstances. For some leaders, this may mean operating outside of their comfort zone or "flying without a net." The Core, Edge & Agility seminar gives leaders at all levels an awareness of the paradoxes in which they all operate and how they apply a simple process to develop their own leadership Agility to increase effectiveness as a leader. After an initial seminar, leaders are encouraged to develop their Agility through one-on-one Top Performance Coaching focused on 2-4 key behaviors for their unique leadership development needs. The Core, Edge & Agility leadership framework was developed in 2003 and the blended learning solution based on it was rolled out in 2004. The date of the last significant update/revision (defined as >=30% content revision) is 06/01/2004.

**Formal third party recognition and/or awards:** While the blended learning curriculum has not been reviewed by any third parties, the underlying Core, Edge & Agility research and leadership framework has been reviewed in numerous academic settings and has been presented in leadership forums globally.

**Participant profile:** The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.

**The most common industries represented by clients purchasing this offering are:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services

**DESCRIPTION OF COMPONENTS OF BLENDED CURRICULUM**

**Component 1 - Core, Edge & Agility Seminar**

**Classroom Training (Awareness and Skill Building)**

**Description:** The Core, Edge & Agility seminar can be delivered in either 2, 4 or 8 hour increments depending on the size of the audience and level of awareness/skill building
desired. Each seminar has five sections which are modified to the organization's specific requirements: Leadership Challenges and The Notion of Paradox; LHH's Leadership Research Study and Report; The Core, Edge & Agility Leadership Framework; Assessing and Developing Individual Agility (using the Agility Index); and Assessing and Developing Organizational Agility (based on Reinforcing Systems).

**Duration:** 2, 4 or 8 hours (or other based on unique needs).

**Stand-alone available:** Yes

**Component 2 - Follow-up Top Performance Coaching**

**One-on-One Coaching (Behavior Change and Development)**

**Description:** Each participant is encouraged to participate in a 3, 6 or 12 month Top Performance Coaching program to reinforce the concepts of Core, Edge & Agility in the context of their own unique developmental needs. These coaching programs are based on LHH's four-step coaching model (Strategy, Information, Action Plan, Results) which ensures a standard focus on both desired leadership behavior change and achievement of business results in alignment with organizational strategy.

**Duration:** 3, 6 or 12 months; **Stand-alone available:** Yes; **Prerequisites:** No

**Limited Customization:** The Core, Edge & Agility model is meant to be complementary and additive to other leadership frameworks and competency models. In addition, the seminar is meant to be delivered in the context of the participant’s company and industry (to ensure relevant examples). Therefore, each seminar is customized to a limited extent.

**Pre-assessment:** Part of the initial seminar includes assessing individual agility. This can be done as a prerequisite in either self-assessment or 360-degree input. Additional cost depends on the magnitude of pre-work desired.

**Languages in which this blended curriculum is currently offered:** U.S. English, U.K. English, Spanish, French, German, Korean, Japanese, Chinese – Mandarin, Chinese – Cantonese

**Countries in which this blended curriculum is currently offered:** This program is available globally. However, the initial seminar is often delivered in one area (e.g., North America) with follow-up coaching required in multiple global locations. Please contact LHH for specific requirements.

**Standard materials provided with curriculum:** The curriculum includes all presentation and facilitation materials, the LHH Leadership Agility Index for all participants and handout materials for the session. The follow-up coaching includes participant reference and action planning materials.

**Standard way to measure program effectiveness and individual behavior change:** They measure effectiveness at the individual level through a four-step coaching model. In step one (STRATEGY) desired behavioral changes are tied to business outcomes. In step two (INFORMATION) and step three (ACTION PLAN) these behavior changes are quantified and planned. Finally, in step four (RESULTS) behavior changes and business outcomes achieved are quantified in previously agreed to ways for comparison to desired results.

**Other measurement options offered:** Additional 360-degree assessments can be done over time to validate that desired behavior change has occurred for seminar and coaching participants.

**Name of classroom component:** Core, Edge & Agility Seminar

**Delivery options:** Trainers/consultants deliver the program; co-facilitation with client trainers, train-the-trainer programs and program licensing are available.
Maximum number of participants: Unlimited; smaller groups of 20-30 are ideal but large (typically shorter) sessions can be effective as well.

Number of trainers/consultants required: 2 trainers/consultants per 20-100 participants; 3-4 for large groups

Co-facilitation with client trainers:
Maximum number of participants - Same as LHH facilitation
Number of trainers/consultants required - Client facilitators are incremental to LHH needs

TRAIN-THE-TRAINER PROGRAMS AND PROGRAM LICENSING
Duration: 16 hours
Maximum number of participants: 12 per session
Number of trainers/consultants required: 2

Duration of classroom training: Typically delivered in 2, 4 or 8 hours. Customized times available based on unique requirements.

The program design includes the following components:
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Case Studies 20%
- Participants complete the LHH Leadership Agility Index and debrief learning’s in dyads 10%
- Participants complete an action plan focused in improving their leadership Agility and debrief learning’s in dyads 10%

Pre-work/Post-work: The LHH Leadership Agility Index can be administered individually by participants and/or in 360-degree format prior to the session (although it is not essential). The Agility Index is simple and straightforward and can be completed during the session. However, if 360-degree feedback is desired, it must be captured as pre-work. Individual Top Performance Coaching in 3, 6 or 12-month programs.

Name of coaching solution: Top Performance Coaching

Description of coaching intervention and its purpose: LHH Top Performance Coaching is a four-step process focused on leadership behavior change in the context of an organization’s business goals and objectives. It blends skill and behavior development with quantifiable business outcomes. Measuring results in Coaching is key with respect to defining ROI, and is central to LHH's Leadership Consulting business. Measurement is incorporated into the process from the beginning, as it helps to set performance expectations, create learning opportunities, and achieve business results for the customer. With an intense three-month program, a six-month program or longer, measurable results are clearly defined and appraised. Setting objectives and expectations of the assignment will involve all parties investing in the program, incumbent, direct supervisor and/or Human Resources or line of business stakeholders. Those deliverables to be measured may be tangible (i.e., measured financially or in percent of change to the organization) or intangible (i.e., perceived change of benefit). This process is ongoing, and the level of need identified in the initial outcomes meeting determines its frequency. The information gathered at these progress meetings is then discussed between supervisor, HR and coach, and used to further refine the coaching being provided. This ensures that the sponsoring company is always in the loop on the progress being made, enabling them to continually judge the value of the program.
The four-step process is described below:

**Step 1 - Determining Outcomes:**
Define the objectives, issues, roles and relationships for the incumbent, the incumbent’s manager, Human Resources and the LHH coach. During this time we look to establish rapport and identify performance issues related to the organizational business objectives. We also conduct contracting/commitment meeting with the incumbent, manager and Human Resources.

**Step 2 - Gathering and Assessing Information:**
Gather and assess information about the incumbent’s leadership behavior/potential, communication style/skills, work/life values, ambitions and other variables. Feedback from the incumbent’s manager, peers and subordinates can be collected in a variety of ways: conducting interviews with team members to analyze leadership style; administering and interpreting assessments; observation of the incumbent at work; assessment of the situation and organizational issues impacting the incumbent; and finally through confirmation of agreed upon outcomes with the incumbent.

**Step 3 - Creating and Implementing Strategy:**
Create and implement a personalized development plan designed to develop skills and/or change behaviors. We create an action plan, jointly with the incumbent, tied to organizational objectives/outcomes; schedule weekly meetings (bi-weekly meetings as time progresses); and schedule and create mid-phase meetings with manager and Human Resources.

**Step 4 - Measuring Results**
Monitor and evaluate results against the action plan. We schedule final sessions with the incumbent; conduct final evaluation sessions with manager, Human Resources and any team members as appropriate; and determine next steps or closure.

**Standard number of coaching sessions per participant:** Coaching programs are typically administered over 3, 6 or 12 months. As an example, a 3 month program usually involves 34 hours of one-on-one time. Programs can be customized as needed to a few hours for a consultation or longer and more intense to help an executive achieve a specific focus or outcome (such as starting in a new position or taking over a large, enterprise-wide project).

**Standard duration of each coaching session:** Coaching session are typically 1-1½ hours in length but can be modified based in the specific needs of both coach and participant being coached.

**Recommend or average frequency of contact:** Weekly to bi-weekly initially with longer intervals acceptable in later months.

**Percentage of coaching delivery through:**
- Face-to-Face Meeting 70%
- Phone Conversations 30%
## Mercer Delta Consulting, LLC dba Mercer Delta Executive Learning Center (formerly CDR International)

<table>
<thead>
<tr>
<th>Address</th>
<th>Phone</th>
<th>Email</th>
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<tbody>
<tr>
<td>1631 NW Thurman Street, Suite 100 Portland, OR 97209</td>
<td>503-223-5678</td>
<td><a href="http://elc.mercerdelta.com">http://elc.mercerdelta.com</a></td>
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<td>1177 Avenue of the Americas, 38th Floor New York, New York 10036</td>
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<tr>
<td>1 California Street, 16th Floor San Francisco, CA 94111</td>
<td>415-273-1200</td>
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<td>3475 Piedmont Road NE, Suite 800 Atlanta, GA 30305</td>
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<td>200 Clarendon Street, 11th Floor Boston, MA 02116</td>
<td>617-424-3930</td>
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<td>1717 Arch Street, 27th Floor Philadelphia, PA 19103</td>
<td>215-982-4500</td>
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### Additional office locations continued:
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- BCE Place 161 Bay Street Toronto, Ontario M5J 2S5 416-868-2800
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- 28, avenue Victor Hugo 75116 Paris France 33-1-70-75-01-20

### Sales contact:
- Marisol Cadiz
- marisol.cadiz@mercerdelta.com

### FINANCIAL PROFILE

**Ownership/Funding:** Public company; Marsh & McLennan Companies, Inc. (MMC)

**Mergers/Partnership/Formal Alliance Activity:** Mercer Delta Consulting acquired CDR International on April 1, 2004

### EMPLOYEE PROFILE

**Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training:** Mercer Delta Executive Learning Center’s faculty and coaches have an average of 20 years each of senior-level experience in corporate settings, combined with extensive academic education. Each of the action-learning experts has faced challenges similar to those addressed in the programs they lead. As current and former business executives, owners, and consultants, they have experience both in business theory and corporate practice, they regularly present at conferences, and they are published authors of books and articles on executive training, change, leadership management, and talent development.

### ORGANIZATION TENURE

**Years in business:** 20+ (Mercer Delta Consulting)

**Years as a leadership training vendor:** 5 - 9 years (CDR International, now Mercer Delta Executive Learning Center)
CLIENT PROFILE
Number of client companies who purchased their leadership training solutions in the last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 46
Percentage of these client companies listed in the Fortune 500: 69.56%
Customer Service infrastructure/philosophy: Mercer Delta Executive Learning Center (ELC) partners with clients to design and deliver customized, in-house executive education programs that help them implement business strategies and achieve results.

To support programs globally, ELC has developed a robust infrastructure that provides seamless, customizable solutions – from program design and materials development, through participant enrollment and post-program evaluation.

ELC’s world-class infrastructure includes:
- Proprietary, web-based learning platforms
- Dedicated client service and project support teams
- Experienced program and content designers
They also leverage administrative business partners with assessment, publishing, and distribution expertise to ensure the scalable and economical delivery of large-scale, executive-development efforts.

Mercer Delta ELC fosters an ongoing dialogue with client organizations through a variety of formal and informal means. Client satisfaction is measured at the conclusion of every program, and they stay in touch with broader client business issues through periodic conversations with senior leadership teams.

Similarly, they maintain their position as a thought leader in the areas of executive education, change management and organizational development through close collaboration with their Mercer Delta Organizational Consulting colleagues and their elite global network of industry experts and service providers.

Mercer Delta ELC employs a range of methods to identify goals, embed learning, and measure the impact of their work within client organizations. They work closely with management on the up-front identification of key business issues and drivers, seeking commitment at all stages of the design, development, delivery, and implementation of a project. At the participant level, they utilize an individual action planning process to apply learning to daily work; focusing on both short- and long-term outcomes that are tied directly to business results. Within this framework, they are able to evaluate impact and assess the client’s investment against agreed-on qualitative/quantitative criteria. Typically this involves the CFO in determining methods for measuring ROI, tracking participants’ progress against stated goals, and monitoring the outcome of specific action learning projects.

COMPANY PROFILE
Organization’s leadership development philosophy: Mercer Delta ELC partners with companies that view leadership as a primary driver to achieve their organization’s strategy, by aligning leaders and continuously upgrading leadership capabilities. Their outcomes-focused approach to executive education addresses such critical organizational issues as growth, innovation, integration/synergy and globalization.
Their work is driven from the larger context of the CEO’s business strategy and change agenda, and success hinges on the active involvement of the CEO and Executive Team. They employ a systemic, strategy-driven leadership development approach, focusing at the enterprise level to design customized strategies that address critical needs. Their solutions are scalable and flexible to rapidly impact a broad section of an organization’s leadership. Each of their custom programs is directed toward a unique set of goals and business challenges that form the platform for building a stronger set of leaders.

Three aspects of a leadership program design that are most important to its success and effectiveness are:

1.) **Action Learning** - Mercer Delta ELC has a bias for action ensuring that practical leadership frameworks and skills are applied to real business problems and opportunities. This is reflected in their thought leadership and focus on action learning as an integral part of their programs. Used to achieve any number of specific business goals, action learning gives companies the power to recreate themselves by first recreating their leaders. By focusing on "learning by doing," using real-world projects that are of importance to client organizations, leadership development becomes a strategic lever for change that transfers seamlessly from the classroom into the workplace, linking executive development to business needs and touching attitudes and behaviors in ways that support ongoing organizational transformation.

2.) **Alignment with business objectives** - Mercer Delta ELC works at multiple levels within client organizations to achieve alignment with business objectives. They solicit executive team input to help establish leadership development strategy, utilize collaborative design techniques during program design, enlist client company leaders as teachers on some of their programs, and conduct action learning projects that address specific organizational objectives.

3.) **Coaching** - Coaching is a critical component of nearly all of their executive education programs. Participants receive individualized coaching sessions over the course of a program to help them interpret feedback, examine leadership challenges, synthesize learning in order to identify the most meaningful action implications, and formulate personal and business-results plans.

**LEADERSHIP TRAINING DELIVERY METHODS**
Classroom training is offered. The majority of their programs involve a coaching component (i.e., blended learning); however, they do provide classroom programs to clients based on the client’s need. Each client program is distinct. Classroom training represented 0-24% of their leadership revenue in the last fiscal year. E-Learning programs are not offered, nor are stand-alone leadership training products. Blended Learning leadership programs/curricula are offered.

**CLIENT-SPONSORED PROGRAMS**
Mercer Delta ELC offers a client-sponsored program focused on building the capacity of human resources leadership teams, to design and deliver high-impact organizational solutions and services that contribute to business performance. The High-Impact HR Leadership Consortium is an action-learning development program for six human resources leadership teams. Each team has six leaders from a different client company. The program extends over a three- to four-month period, with an expert-faculty curriculum, coaching support for each team on a breakthrough change project, and coaching support on each member's individual development.
Distinct custom-designed programs: Each of the distinct, on-site programs conducted during 2004 were custom designed to meet specific client needs. Nearly all were blended offerings that included a coaching component. Blended learning represented 75-100% of their leadership revenue in the last fiscal year.

Additional information: As part of Mercer Delta Organizational Consulting, the ELC complements its large-scale program offerings with world-class consulting expertise, enabling clients to embed leadership development activities and the growth of individual leaders within the larger context of organizational change. This integrated approach to leadership development and organizational change goes beyond the focus on individual leaders of business schools and training firms.

High Impact HR Leadership Consortium

**Modality:** Blended learning

The single most important skill/competency area addressed in this program is:
- Problem analysis/Strategic decision making

The secondary skills/competency areas addressed in this program are:
- Assessing/developing your leadership skills/style
- Coaching skills
- Business Acumen
- Talent management (selection/retention/development)
- Thinking Globally
- Leading/sponsoring change
- High performing teams

**Course description:** The High-Impact HR Leadership Consortium clarifies the complex layers of today’s business environment and reveals strategies for personal, team, and organizational success. This intensive leadership development experience prepares leaders to broaden their perspectives and transform themselves from competent HR professionals to credible executive business partners. HR leadership teams throughout the world come together to challenge their current views—to venture from the familiar to focus on a new level of possibility.

Using the High-Impact HR Leadership Consortium’s Action Learning methodology, each team solves a real business dilemma, gaining new skills and knowledge in the process. Six HR leadership teams from non-competing companies, each comprising six to eight high-potential leaders. In-depth three- to four-month time frame, with an expert-faculty curriculum; Stakeholder analysis on important organizational/business issues facing companies and on expectations for HR’s role in addressing these issues; Customized assessment and feedback; Coaching for each team and for members’ individual development; Peer coaching between teams; Exposure to world-class expert faculty and coaches on leading-edge topics. This program has been in existence since 2002.

**Participant profile:** The primary audience includes Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers.

**Description of modules in blended learning curriculum: Component 1 - Week One On-Site Session**

**Description:** Classroom training featuring thought leadership focused on ‘Linking HR to the Business’ and ‘Building Organizational Capability.’ Teams begin work on their company-specific Action Learning projects. Individual participants review assessment feedback and receive one-on-one coaching with an ELC coach. **Duration:** 5 days
Format:
• Trainer/Consultant Presentation 40%
• Discussion 40%
• Exercises/Quizzes 20%

Pre-Assessment: Yes
Pre-work/Post-work: Selection of team Action Learning project in conjunction with company sponsor. Completion of individual assessments as determined with the client. Assessments may include some or all of the following: Mercer Delta ELC Leadership Derailment Report, HR Leadership 360 Feedback Survey, FIRO-B, LGE Full Engagement Inventory, Focus Energy Intelligence Instrument (FEI2). There is ongoing work on team Action Learning project during interim period between first and second on-site sessions. Post-work consists of ongoing team and individual coaching over the three-month program period.

Component 2 - (Team Action Learning Projects)
Description: Participating company HR teams apply skills learned during on-site sessions to craft recommendations for addressing a specific business challenge identified by their company sponsor.
Duration: Approx. 3 months
Format: Teams of six to eight company HR leaders work together during on-site sessions and during interim period supported by coaching throughout the duration of the program.

Component 3 - Coaching/Feedback
Description: Individual executive development and team coaching by ELC faculty.
Duration: Approximately 3 months
Format: Individual executive and team coaching takes place during both on-site sessions, as well as during the team’s interim work on their Action Learning project.

Component 4 - Week Two On-Site Session
Description: Classroom training featuring thought leadership focused on ‘Developing Global Mindsets,’ Coaching to Drive High Performance,’ and ‘Facilitating Organizational Change.’ Individuals participate in peer coaching. Teams finalize their Action Learning project recommendations and present to company HR heads and line sponsors.
Duration: 5 days
Format:
• Trainer/Consultant Presentation 30%
• Discussion 50%
• Exercises/Quizzes 20%

Follow-through/reinforcement options: Additional six-month individual executive coaching engagements; continued team consultation as needed.
Standard measurement of results: Post-program participant and sponsor evaluation
Optional measurement: Monitoring and measurement of team project results

Additional information: Mercer Delta Executive Learning Center (ELC) provides in-house action-learning programs that help companies implement business strategies and achieve measurable results. They are the leadership-development partner for Global 1000 companies that view leadership as a primary driver to achieve their organization’s strategy. They focus on business outcomes: growth, innovation, integration/synergy, and globalization. ELC is a division of Mercer Delta Consulting, a global consulting firm working with CEOs and executive teams of major companies on the design and leadership of organizational change.
Ninth House, Inc.®

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FINANCIAL PROFILE
Ownership/Funding: Privately-held
Annual fiscal revenue: 2 Years Ago - $0-9 million; Last Fiscal Year - $10-19 million
Annual fiscal revenue from leadership offerings: 2 Years Ago - $0-9 million; Last Fiscal Year - $10-19 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%
Profitability based on last fiscal year: GAAP profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 51
Total number of employees delivering the leadership training solutions: 51

ORGANIZATION TENURE
Years in business: 5 - 9 years; Years as a leadership training vendor: 5 - 9 years

CLIENT PROFILE
Number of client companies who purchased the leadership training solutions in the last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.):
200
Percentage of these client companies listed in the Fortune 500: 21%

Top 5 client companies:
1. U.S. Department of Justice
2. U.S. Navy
3. British Telecommunications
4. Wachovia
5. Wells Fargo

Top competitors:
1. SkillSoft
2. netG
3. Harvard Online
4. Blessing White

Ninth House is fitted with a multi-rater that enables data gathering and analysis of behavioral impact of Ninth House Blended Learning. For further analysis, we have partnered with KnowledgeAdvisors for full ROI/financial impact analysis.

Leadership Development Philosophy: We envision a world community with unlimited access to a personalized development experience that builds individual and organizational excellence.

Core Values
- Respect and professionalism
- Customer focus
- Relentless execution
- Constant innovation
- Perspective and fun

LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is offered as part of the blended online offering.
Client-sponsored programs are offered.
E-Learning is offered through 450 Instant Advice® modules.
There are 15 courses that are stand-alone leadership training products.
There are 15 blended learning leadership programs/curricula.
STANDARD INFORMATION FOR ALL BLENDED LEARNING SOLUTIONS

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Pharmaceutical

Components of the curriculum in the order in which they are delivered:

**Component 1 - Self-Paced Learning**

*Modality:* NetCD, Media Server

*Description:* Building community teaches employees the first steps required to build and maintain emotionally satisfying work relationships that support the goals of the organization.

- Module 1: An Introduction to Building Community
- Module 2: Nurturing Attitude
- Module 3: Responsibility and Dependability
- Module 4: High Expectations and Hope
- Module 5: Friendship and Brotherhood
- Module 6: Courage
- Module 7: Plan of Action

*Duration:* 2 ½ hours; *Stand-alone available:* Yes

**Component 2 - Trainer-Facilitated Activity Sessions**

*Modality:* Classroom

*Description:* Take the knowledge you learned online and apply it in the real world with Ninth House Certified trainers and facilitators. Ninth House Extended Learning Guides enables Trainers and Facilitators at your organization to plan and lead group sessions that take the course information and apply it to the learner’s work environment. Group application sessions and action learning highlight these 1/2 to full-day sessions.

*Duration:* 4-8 hours; *Stand-alone available:* Yes

**Component 3 - Knowledge Reinforcement through Instant Advice EPSS**

*Modality:* NetCD, Media Server

*Description:* A searchable and “emailable” catalogue of over 450 interactive video clips—and based on the Ninth House course taken at your organization—Instant Advice provides real-time access to solutions for today’s most common business challenges.

*Stand-alone available:* Yes

*Prerequisites:* There are no prerequisites for the program.

*Customization:* Limited customization is available.
An online pre-test is included in the cost of course.

*Languages/Countries in which this blended curriculum is currently offered:* This blended curriculum is offered in U.S. English worldwide.

*Standard materials provided with curriculum:* NetCD, Extended Learning Journal

*Reinforcement/Follow-up options:* Instant Advice.

*Standard way to measure program effectiveness and individual behavior change:* Measure results in real-time for individuals and courses overall. With 360-degree multi-raters and an integrated partnership with KnowledgeAdvisors®—the industry’s foremost leader in learning measurement—Ninth House makes it easy to track the progress of the organization’s initiatives down to the learner level and see the impact on the bottom line.

*Other measurement options offered at additional cost:* Level I-V measurement included
Name of classroom component: Trainer-Facilitated Activity Sessions
Take the knowledge learned online and apply it in the real world with Ninth House Certified trainers and facilitators. Ninth House Extended Learning Guides enables trainers and facilitators at organizations to plan and lead group sessions that take the course information and apply it to the learner’s work environment. Group application sessions and action learning highlight these ½ to full-day sessions.

Delivery options provided: Trainers/consultants deliver the program; co-facilitation with client trainers is available, as well as train-the-trainer programs and program licensing.

Maximum number of participants: Unlimited. Classroom portion may be delivered in person or virtually via the web.

Number of trainers/consultants required: Varies.

Duration of Train-the-trainer programs and program licensing: ½ day
The maximum number of participants: 5, ideally
Number of trainers/consultants required: 1
Duration of classroom training: ½–1 full day, varies

The program design includes the following components:
- Trainer/Consultant Presentation 10%
- Discussion 25%
- Exercises/Quizzes 25%
- Group Activities/Role Plays 25%
- Case Studies 5%
- Simulation 10%

Pre-work/Post-work: Provided in the classroom training component, Extended Learning Journal

Name of e-Learning components or CD-ROM: Instant Advice
Description: Learning sets the foundation, but reinforcement helps keep your newfound knowledge at the forefront of your business day. With Ninth House Instant Advice®, information reinforcement and retention is as simple as point and click. A searchable and “emailable” catalogue of over 450 interactive video clips—and based on the Ninth House course taken at your organization—Instant Advice provides real-time access to solutions for today’s most common business challenges.

This program is: CD-ROM and asynchronous (self-paced) e-Learning
Pre-assessments for participants: Not available.
Number of modules: 450
Length of each module: 2-5 minutes
Pre-work/Post-work: No pre-work or post-work is provided.

The percentage of each instructional technique for this e-learning component:
- Audio 70% (audio & video)
- Video 70% (audio & video)
- Scenarios 5%
- Quizzes 5%

Help Desk Support: 7am-7pm; English; In-house (not outsourced)
Operating systems on which this program is compatible: Microsoft Windows 98 SE, NT Workstation v4.0 with SP6 or later, Millennium, 2000 Professional, or XP
Required Plug-ins: Microsoft Windows Media Player v6.4 or later for video, audio playback; Macromedia Flash v5.0 or higher for animation (except for version 6.0.47)
Minimum Bandwidth: 10BASE-T Ethernet network interface card (for use with media server) or 33.6-Kbps modem (for use with NetCD discs): 56.6 Kbps is required for Instant Advice

Browser(s) on which this program is compatible: Microsoft Internet Explorer v5.5 or later, Netscape Navigator v4.7x or 4.8x only (v6 and above not supported)

Compatible/Compliant: SCORM compatible, AICC compatible, Section 508 compliant

Learning Management System(s) that have been tested and are compatible with this program: Docent 5.00, Thinq, Saba 3.50, Proprietary, Plateau, Saba 3.40, Saba, KMSI, Docent 6.00, TEDS, Aspen, Docent, Docent 6.00, Learn.com, Internet U, Net Learning, Cyber U, Lotus Learning Space, Meridian

Additional information regarding the e-Learning component of this blended curriculum: Course dependent (450+ modules available)

Coaching Component (in support of Learning)

Name of coaching solution: Instant Advice

Description of coaching intervention and its purpose: A searchable and “emailable” catalogue of over 450 interactive video clips—and based on the Ninth House course taken at your organizations—Instant Advice provides real-time access to solutions for today’s most common business challenges.

Standard number of coaching sessions per participant: Unlimited

Standard duration of each coaching session: 2-5 minutes

Recommended or average frequency of contact: As needed

Percentage of coaching delivery through online: 100%

Building Community

Modality: Blended learning

Content provider: Clifton Taulbert

The single most important skill/competency area addressed in this program is:

- Appreciating diversity

The secondary skills/competency areas addressed in this program are:

- Communication Skills
- Creativity and innovation
- Building positive relationships

Overall description of curriculum: Based on the critically acclaimed book Eight Habits of the Heart, by Clifton Taulbert, Building Community helps employees transform the work environment into one that values respect and cooperation and encourages a diversity of views and people. By creating an atmosphere that supports the timeless values highlighted in this course, individuals become part of a working community that engenders greater productivity, personal fulfillment, a more talented and loyal workforce, and an overall improved company reputation. This blended curriculum has been in existence since 10/15/01.

Participant profile: The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.
Capturing Brand You

*Modality:* Blended learning
*Content provider:* Tom Peters

**The single most important skill/competency area addressed in this program is:**
Assessing/developing your personal leadership skills/style

**The secondary skills/competency areas addressed in this program are:**
- Setting & Achieving Goals
- Time/Project Management
- Communication
- Building positive relations
- Talent Management
- Creativity and innovation

**Overall description:** Employees learn to identify productive and rewarding goals in this engaging course with Tom Peters, best-selling co-author of In Search of Excellence and the author of The Circle of Innovation. Employees will benchmark their current reputation, establish their desired reputation, and pinpoint activities that further both their own and the organization's objectives. Capturing Brand You inspires individuals to create 'work worth paying for' while advancing the long-term success of the organization. This blended curriculum has been in existence since 6/26/00.

**Participant profile:** The primary audience includes Mid-level managers and Supervisors and/or front-line managers.

Forging Breakthroughs

*Modality:* Blended learning
*Content Provider:* Peter Senge

**The single most important skill/competency area addressed in this program is:**
- Problem solving/strategic thinking/decision making

**The secondary skills/competency areas addressed in this program are:**
- Communication
- Leading/sponsoring change efforts
- Performance Management
- Creativity & Innovation

**Overall description of curriculum:** Based on Peter Senge's best-selling work, The Fifth Discipline: The Art and Practice of the Learning Organization, this dynamic course gives employees the tools they need to produce high-quality solutions to complex business challenges. They’ll develop skills in critical thinking, tactful conversation, and the synthesis of multiple perspectives into breakthrough business successes. Forging Breakthroughs helps individuals improve their own problem-solving techniques while enabling their organization to quickly adapt to the changing work environment. This blended curriculum has been in existence since 7/30/01.

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.
High Impact Hiring

**Modality:** Blended learning  
**Content provider:** Joseph Rosse & Robert Levin  

**The single most important skill/competency area addressed in this program is:**  
- Talent management  

**The secondary skills/competency areas addressed in this program are:**  
- Performance management  
- High performing teams  
- Leading/sponsoring change  

**Overall description of curriculum:** Based on the critically acclaimed book High Impact Hiring: A Comprehensive Guide to Performance-Based Hiring, by Joseph Rosse and Robert Levin, this program teaches hiring managers to use a performance-based strategy to quickly and successfully identify and select the right talent for their organization in a highly competitive labor market. This blended curriculum has been in existence since 10/20/00. This program is ASTD Certified.  

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

Innovation: WOW Projects

**Modality:** Blended learning  
**Content provider:** Tom Peters  

**The single most important skill/competency area addressed in this program is:**  
- Creativity and innovation  

**The secondary skills/competency areas addressed in this program are:**  
- Time/project management  
- Building positive relationships  
- Communication skills  
- Setting and achieving goals  
- High performing teams  
- Building partnerships and alliances  

**Overall description of curriculum:** Gain insight from Tom Peters, best-selling co-author of In Search of Excellence and author of The Circle of Innovation. This course helps organizations drive change and ensure that innovation becomes a strategic advantage. Employees learn how to find or invent a project that matters; how to design, prototype, and add a distinctive edge to the project; how to sell it to sponsors in the organization who can help make a difference; and how to roll it out to the organization for ongoing success. This blended curriculum has been in existence since 11/12/99.  

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.
Instant Advice

Modality: E-learning (EPSS)

The competencies addressed through this online performance support are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

Description: The Ninth House® Instant Advice® product provides immediate, actionable solutions to 500 of the most frequently encountered business challenges. Engaging, just-in-time learning gives employees the tactical step-by-step assistance they need to quickly resolve the daily issues they face at work. Ninth House offers Web-based advice from a wide range of business thought leaders including Ken Blanchard, author of The One Minute Manager®, Peter Senge, author of The Fifth Discipline, and Jon Katzenbach, author of The Wisdom of Teams.

This program is: CD-ROM and asynchronous (self-paced)

Formal third party recognition and/or awards: This program received the 2003 HR Exec Best Products Award

Participant profile: The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Pharmaceutical

Customization: Complete Custom Design (and limited customization) is available.

Pre-assessments for participants: Not available

Pre-requisites: There are no prerequisites for this program.

Number of modules: 450+; Length of each module: 2-5 minutes
Percentage of instructional techniques for this program:
- Audio  70% (audio & video)
- Video  70% (audio & video)
- Simulations 20%
- Scenarios 5%
- Quizzes 5%

Pre-work/Post-work: Neither is provided.
Standard materials provided with program: NetCD
Languages in which this program is currently offered: U.S. English
Help Desk Support: 7:00 am – 700 pm; Available in English; In-House (not outsourced)

MINIMUM TECHNOLOGY REQUIREMENTS
Operating systems on which this program is compatible: Microsoft Windows 98 SE, NT Workstation v4.0 with SP6 or later, Millennium, 2000 Professional, or XP
Required Plug-ins: Microsoft Windows Media Player v6.4 or later for video, audio playback, Macromedia Flash v5.0 or higher for animation (except for version 6.0.47)
Minimum Bandwidth: 10BASE-T Ethernet network interface card (for use with media server) or 33.6-Kbps modem (for use with NetCD discs): 56.6 Kbps is required for Instant Advice
Browser(s) on which this program is compatible: Microsoft Internet Explorer v5.5 or later, Netscape Navigator v4.7x or 4.8x only (v6 and above not supported)
Compatible/Compliant: SCORM compatible, AICC compatible, Section 508 Compliant
The following Learning Management System(s) have been tested and are compatible with this program:
Docent 5.00, Thinq, Saba 3.50, Proprietary, Plateau, Saba 3.40, Saba, KMSI, Docent 6.00, TEDS, Aspen, Docent, Learn.com, Internet U, Net Learning, Cyber U, Lotus, Learning Space, Meridian

Managing Change
*Modality:* Blended learning
*Content Provider:* William Bridges

The single most important skill/competency area addressed in this program is:
- Leading/Sponsoring Change

The secondary skills/competency areas addressed in this program are:
- Assessing/developing your personal leadership skills/style
- Performance management
- Creativity & Innovation

Overall description of curriculum: From William Bridges, best-selling author of Transitions and Managing Transitions, the Managing Change course helps organizations stay competitive in a constantly shifting business environment by providing managers with the leadership skills needed to mobilize employee support for change initiatives. By learning to recognize and address the internal transitions associated with any change, managers are better able to guide employees productively through continuous organizational change. This blended curriculum has been in existence since 5/6/02.

Participant profile: The primary audience includes Mid-level managers and High potential leaders. The secondary audience includes Supervisors and/or front-line managers.
Navigating Change

Modality: Blended learning
Content Provider: William Bridges

The single most important skill/competency area addressed in this program is:
• Leading/Sponsoring Change

The secondary skills/competency areas addressed in this program are:
• Communication Skills
• Building positive relationships with others
• High performing teams
• Dealing with Ambiguity

Overall description of curriculum: From William Bridges, best-selling author of Transitions and Managing Transitions, the Navigating Change program helps organizations stay competitive in a constantly shifting business environment by providing individual employees with the skills necessary to understand and support change initiatives. By learning to recognize and address the internal transitions associated with any change, individuals are better able to guide themselves productively through organizational change. This blended curriculum has been in existence since 3/24/03.

Participant profile: The primary audience includes Mid-level managers and High potential leaders. The secondary audience includes Supervisors and/or front-line managers.

The most common industries represented by clients purchasing this offering are:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Pharmaceutical

Description of the components of the curriculum in the order they are delivered:
Component 1 - Self Paced Learning (Online)

Modality: NetCD, Media Server

Description: The purpose of Navigating Change is to help learners understand their own response to change and manage the resulting feelings and issues within the context of a group transformation. Managing personal transition will make the individual’s experience of workplace change easier and improve job performance during times of change.

Duration: 1½ hours; Stand-alone available: Yes

Component 2 - Trainer-Facilitated Activity Sessions

Modality: Classroom training

Description: Take the knowledge you learned online and apply it in the real world with Ninth House Certified trainers and facilitators. Ninth House Extended Learning Guides enables trainers and facilitators at your organization to plan and lead group sessions that take the course information and apply it to the learners’ work environment. Group application sessions and action learning highlight these 1/2 to full-day sessions.

Duration: 4-8 hours; Stand-alone available: Yes

Component 3 - Knowledge Reinforcement (Online)

Modality: NetCD, Media Server

Description: A searchable and “emailable” catalogue of over 450 interactive video clips—and based on the Ninth House course taken at your organization—Instant Advice provides real-time access to solutions for today’s most common business challenges.

Stand-alone available: Yes
Optimizing Team Performance

**Modality:** Blended learning  
**Content Provider:** Jon Katzenbach

**The single most important skill/competency area addressed in this program is:**
- High performing teams

**The secondary skills/competency areas addressed in this program are:**
- Problem solving/strategic thinking
- Creativity and innovation
- Performance Management

**Overall description of curriculum:** Based on Jon Katzenbach’s best-selling book, *The Wisdom of Teams*, this course teaches employees how to structure their teams for optimal performance. Team leaders and members will understand how and when to adjust work style and leadership approach to solve problems more effectively, increase creativity, and save time. Using the appropriate approach, teams become fast and flexible agents of change enabling their organization to respond quickly to market demands. This blended curriculum has been in existence since 7/14/03.

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

Partnering for Results

**Modality:** Blended learning  
**Content provider:** Larraine Segil

**The single most important skill/competency area addressed in this program is:**
- Building partnerships and alliances

**The secondary skills/competency areas addressed in this program are:**
- Communication
- Building positive relationships
- High performing teams
- Dealing with ambiguity

**Overall description of curriculum:** Based on Larraine Segil’s best-selling book, *Intelligent Business Alliances*, this course helps managers understand and successfully develop business partnerships, both internal and external. Using Larraine Segil’s unique MindshiftSM approach, middle managers learn to diagnose a potential partner’s corporate lifecycle stage and personality, managerial personality, and project type in order to better structure and manage a business relationship. This blended curriculum has been in existence since 5/15/00.

**Participant profile:** The primary audience includes Mid-level managers and High potential leaders. The secondary audience includes Supervisors and/or front-line managers.
Reframing Change

**Modality:** Blended learning  
**Content provider:** William Bridges  

**The single most important skill/competency area addressed in this program is:**  
- Leading/sponsoring Change  

**The secondary skills/competency areas addressed in this program are:**  
- Motivating and inspiring others  
- Problem solving/strategic thinking  
- Assessing/developing your leadership skills/style  
- Innovation and creativity  
- Talent management  

**Overall description of curriculum:** From William Bridges, best-selling author of Managing Transitions: Making the Most of Change, the Reframing Change course provides employees with a clear distinction between the concepts of change and transition and presents a three-stage model of transition that offers insight and a fresh perspective on the often difficult and confusing times of change. By understanding each stage of the internal transition process that accompanies change, employees at all levels are better able to diagnose their own situations and begin to guide themselves through the transition process. This blended curriculum has been in existence since 3/19/01.  

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

Resolving Interpersonal Issues

**Modality:** Blended learning  
**Content provider:** David Bradford and Allan Cohen  

**The single most important skill/competency area addressed in this program is:**  
- Conflict resolution  

**The secondary skills/competency areas addressed in this program are:**  
- Building positive relationships  
- Communication skills  
- Problem solving/decision making  

**Overall description of curriculum:** Based on the critically acclaimed Power Up: Transforming Organizations Through Shared Leadership, by Allan Cohen and David Bradford, this course teaches individuals fundamental communication skills. By committing to open discussion and mutual problem solving, employees will be better able to address interpersonal issues and build powerful working relationships. This blended curriculum has been in existence since 1/25/02.  

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.
Self Management  
*Modality:* Blended learning  
*Content provider:* Ken Blanchard  
**The single most important skill/competency area addressed in this program is:**  
- Assessing/developing your own personal leadership skills/style  
**The secondary skills/competency areas addressed in this program are:**  
- Setting and achieving goals  
- Problem solving/strategic thinking  
- Time/project management  
- Communication skills  
- Building positive relationships  
- Dealing with ambiguity  
- Building partnerships and alliances  

**Overall description of curriculum:** The Self Management course is based on the principles of Situational Self Leadership from The Ken Blanchard Companies. Individuals learn to take the initiative in solving problems and assuming responsibility for their own development, leading to peak performance. Employees learn to set goals, get the direction and support they need to achieve those goals, and manage relationships more effectively. This blended curriculum has been in existence since 8/12/99.  

**Participant profile:** The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.  

Situational Leadership II  
*Modality:* Blended learning  
*Content Provider:* Ken Blanchard  
**The single most important skill/competency area addressed in this program is:**  
- Assessing/developing your personal leadership skills/style  
**The secondary skills/competency areas addressed in this program are:**  
- Problem solving/strategic thinking/decision making  
- Setting and achieving goals  
- Motivating/inspiring others  
- Coaching skills  
- High performing teams  
- Conflict resolution  
- Communication skills  
- Building positive relationships  
- Leading/sponsoring change  
- Creativity and innovation  
- Dealing with ambiguity  
- Performance management  
- Talent management  

**Overall description of curriculum:** Gain leadership wisdom from the co-author of the best-selling book The One Minute Manager®. In this course, managers learn coaching skills that will help them develop their employees’ competence and commitment and lead them to maximum productivity as self-reliant, peak performers. This blended curriculum has been in existence since 6/6/99.
Formal third party recognition and/or awards: This program received the 1999 INvision Award.

Participant profile: The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

Technology and Innovation

Modality: Blended learning

The single most important skill/competency area addressed in this program is:
- Creativity and innovation

The secondary skills/competency areas addressed in this program are:
- Leading/sponsoring change
- High performing teams
- Performance management
- Dealing with ambiguity

Overall description of curriculum: The Technology and Innovation course teaches employees to identify opportunities for invention and to build those opportunities into revolutionary concepts, products, and services. Engaging case studies on real innovators at companies such as Nokia, Corning, and Sony demonstrate the leadership practices required to build an environment that fosters creativity and calculated risk taking. This blended curriculum has been in existence since 6/30/04.

Participant profile: The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

Virtual Teams

Modality: Blended learning

Content provider: Mary Ann Kipp

The single most important skill/competency area addressed in this program is:
- High performing teams

The secondary skills/competency areas addressed in this program are:
- Time/project management
- Leading/sponsoring change
- Setting and achieving goals

Overall description of curriculum: In this Ninth House® course created in collaboration with Consultant Mary Ann Kipp, employees learn a framework for effectively working in or with remote teams. Virtual Teams helps today’s organizations remain competitive by leveraging their dispersed teams and employees. As they learn how to best share information across time and space, employees increase their individual value and enhance the organization’s ability to innovate and perform. This blended curriculum has been in existence since 3/19/01.

Participant profile: The audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders.
RBL, Inc. (Results-Based Leadership Group)
3507 N. University Avenue, Suite 175
Provo, UT. 84604
801.373.4238
http://www.rbl.net
Sales contact: Britney Quai
801-373-4238 bquai@rbl.net

FINANCIAL PROFILE
Ownership/Funding: Privately held
Mergers/Partnership/Formal Alliance Activity: Partnerships with Global Consulting Alliance, HPI, Powerful Leaders Alliance, Duke, Sphere, and Strategos.
Annual fiscal revenue: 2 Years Ago - $0 - 9 million; Last Fiscal Year - $0 - 9 million
Annual fiscal revenue from leadership offerings: 2 Years Ago - $0 - 9 million; Last Fiscal Year - $0 - 9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 6-10%

EMPLOYEE PROFILE
Total number of employees worldwide: 13 full-time; Total number of employees delivering leadership training solutions: Based in U.S. – 6
Total number of certified contractors delivering leadership training solutions: Based in U.S. – 35; Internationally – 5
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership-training solutions: Masters in related field (preferably PhD.), extensive corporate experience, and outstanding track record.
Total number of developers of leadership training solutions: 5

ORGANIZATION TENURE
Years in business: 5 - 9 years; Years as a leadership training vendor: 5 - 9 years

CLIENT PROFILE
Number of client companies who purchased leadership training solutions last fiscal year: In 2004, RBL worked with 47 clients. Out of those 47, more than ½ have requested additional projects with RBL.
Percentage of these client companies listed in the Fortune 500: 48.9%
Top 5 client companies:
1. Citi Group
2. Nationwide
3. Merck
4. Raytheon
5. Intercontinental Hotel Group

Customer Service infrastructure/philosophy:
RBL’s mission is to help your leaders make better choices about how to leverage intangibles by identifying and focusing on key issues:
• Where to target investments in your people and your organization for higher impact
• How to increase value and ensure your organization’s hard work is recognized by the market.
RBL provides well-respected, seasoned experts who are sought after to speak and write about change, and know how to collaborate with clients to build high-performing firms.

Providing client forums or using advisory boards to stay in touch with business issues/client satisfaction is currently in development. RBL has worked with clients to
gather data and evaluate the impact of the training in the client workplaces. Specific case studies and examples can be found on their website http://www.rbl.net.

RBL's investment in R&D as a percentage of their leadership sales revenue: 0-5%

RBL's leadership development philosophy: RBL is an education and consulting firm that helps clients create high-performing organizations and build leaders who deliver the right results the right way. They enable their clients to keep their promises to investors, customers, and employees. They deliver a tangible return on investment that shows up in employee morale, customer commitment, and investor buy-in. RBL works closely with organizations to identify the results they want to achieve through investing in their leadership and to then design appropriate educational experiences to achieve those objectives. Their ability to understand, collaborate, and create customized educational solutions is key to their approach.

LEADERSHIP TRAINING DELIVERY METHODS: Client-sponsored and custom-designed classroom training programs are available. Classroom training represented 50-74% of their leadership revenue in the last fiscal year. E-Learning programs are offered. They incorporate e-Learning with many of their workshops. E-learning represented 0-24% of their leadership revenue in the last fiscal year. Stand-alone leadership training products are offered. They represented 0-24% of the leadership revenue in the last fiscal year. Blended Learning leadership programs/curricula are offered. They represented 25-49% of the leadership revenue in the last fiscal year.

Leadership Development Program

**Modality:** Blended learning

The single most important skill/competency area addressed in this program is:


The secondary skills/competency area addressed in this program is:

- Setting and Achieving Goals.

**Overall description:** What's unique about the RBL Leadership Development Programs is that they define your organization’s leadership brand ensuring that your quality of leadership stands out. They build your leadership pipeline by selecting, developing, rewarding, and retaining leaders at every level to ensure confidence internally and externally. Last, they offer interactive, dynamic workshops, customized and targeted to all stakeholders. This blended curriculum has been in existence for over five years. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

**Formal third party recognition and/or awards:** RBL has continued to receive recognition from numerous magazine and business reviews. In 2003, they received the ASTD Award for work they did with Intercontinental Hotels Group.

**Participant profile:** The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
- Education
A description of the components of the curriculum in the order in which they are delivered:

**Component 1 - Executive Team Alignment and Commitment**

**Modality:** Workshop plus follow-up coaching in support of learning

**Description:** The Executive Team workshops help bring executive teams to a shared mindset and commitment to a compelling strategy that spans organizational boundaries. That builds bottom-line performance from both tangible and intangible assets, because performance comes from aligned execution of strategy and pursuit of common goals by all leaders. Since each company’s executive team dynamics, structure, and objectives are unique, this workshop will be tailored to your own needs in close collaboration with your top team. During the workshop, participants clarify your strategy to ensure operational definitions and guidelines for what results your company is going to deliver and how its stakeholders will view it. This shared accountability for business and organization results reduces the chance of varying interpretations and increases the likelihood of successful strategy execution.

**Duration:** 2.5 days, with 1 full day follow up coaching (as needed).

**Stand-alone available:** Yes

**Component 2 - Results Based Leadership**

**Modality:** Coaching, training product and/or e-learning

**Description:** This program helps leaders increase their ability to get results as well as to create an environment where others also build leadership capability to deliver business results. Based on their best-selling book, Results-Based Leadership: How Leaders Build the Business and Increase the Bottom Line (Ulrich, Zenger, and Smallwood), this workshop helps participants get beyond talk and wheel-spinning and begin making things happen in the real world. The workshops develop results-based leaders and enable them to translate business strategy into four desired result areas that build capability to execute business strategy.

**Duration:** 1, 2, and 3 day options, follow up coaching (as needed)

**Stand-alone available:** Yes

**Component 3 - Leveraging Intangibles: Developing Value-Creating Leaders**

**Modality:** Coaching, training product and/or e-Learning

**Description:** This program helps leaders build a practical plan to increase the value of their company, business, region, or function. To help leaders focus on optimizing organization value, it draws on their acclaimed book, Why the Bottom Line Isn’t! How to Build Value Through People and Organization (Ulrich and Smallwood). This workshop provides a hands-on approach to decision-making that will drive profit and inspire stakeholder confidence for your organization through exercises, simulations, and application to your own financial results.

**Duration:** 1 to 2 day coaching, follow-up coaching as needed

**Stand-alone available:** Yes

**Component 4 - Build a Profit Culture**

**Modality:** Coaching, training product and/or e-learning

**Description:** RBL Profit Culture workshops teach leaders both how to define the gauges and how to pull the levers of profitability. The tools taught and practiced in these workshops provide the core skills necessary to build a profit culture in your organization. Going beyond the traditional “Finance for Non-Financial Managers 101” generalities, these action-learning programs provide a practical, hands-on approach to decision-making that will drive profit and inspire stakeholder confidence for your organization through exercises, simulations, and application to your own financial results.

**Duration:** 2 or 3 day workshops, along with an online format that can be self-paced.

**Stand-alone available:** Yes
Component 5 - Bureaucracy Busting

**Modality:** Coaching, training product and/or e-Learning

**Description:** Bureaucracy Busting - Jack Welch called it Work-Out at GE, and used it to eliminate endless hours of wasted effort and cost from the company’s worldwide operations. Lou Gerstner called it ACT (Accelerating Change Together) at IBM where it generated $5 billion worth of value over the last five years. We call it ART (Accelerating Results Together). We have been involved in this change technology since its inception at GE and have continued to refine and improve it in a variety of companies. ART uses the original GE Work-Out formula but precedes it with a disciplined process for identifying how work contributes to competitive advantage and for setting performance goals. This enhancement dramatically improves the return on your Bureaucracy Busting investment. If you follow these principles of change, typical returns average between 50 and 100 times your investments.

**Duration:** 8-10-12 week action projects; Measure impact; Follow-up (as needed)

**Stand-alone available:** Yes

**Pre-requisites:** There are no pre-requisites for the program.

With respect to accommodating different client leadership models and/or other client-specific needs, RBL works with you to understand your business, culture, and values, as well as your current strategy, to help you build a unique leadership brand. They combine modules across different workshops, to suit your needs, and create original educational content designed for your unique circumstances. They collaborate with a global resource pool of content providers, thought leaders, and skilled facilitators to bring you what you need. Your growth is their success. They are always working to transfer their capabilities to your people, so that you can build and sustain your own leadership pipeline. RBL brings methodology and tools; your people make informed choices and live with them, developing a deep commitment to the decisions they make throughout the process.

**Customization:** Limited Customization is also available. Since each company’s executive team dynamics, structure, and objectives are unique, workshops will be tailored to your own needs in close collaboration with your organization.

**Languages in which this blended curriculum is currently offered:** US English, UK English and Spanish.

The Leadership Development Program has been applied and is currently offered internationally.

Standard materials provided with the curriculum do vary. However, presentation materials, along with participant booklets, are standard.

**Reinforcement/Follow-up options and associated costs:** Along with follow-up coaching sessions, RBL offers numerous products to make sure your team leaves with the tools needed for application. For more information regarding software and interactive products, please contact RBL directly.

**Name(s) of classroom component(s):** Leadership Development

**Delivery options provided:** Trainers/consultants deliver the program; co-facilitation with client trainers, train-the-trainer programs and program licensing are available.

**Maximum number of participants:** The average group is 60. Maximum number would depend on logistics, consultants, pricing.

**Number of RBL trainers/consultants required:** One to two consultants with the average group of 60.

**Duration of classroom training:** 2 days
The program design includes the following components:

- Trainer/Consultant Presentation 40%
- Discussion 10%
- Exercises/Quizzes 15%
- Group Activities/Role Plays 15%
- Case Studies 10%
- Simulation 10%

Pre-work/Post-work: Different pre-work and post-work assignments are developed for each program.

E-Learning component(s) or CD-ROM:

Description: This program helps leaders build a practical plan to increase the value of their company, business, region, or function. To help leaders focus on optimizing organization value, it draws on our acclaimed book, Why the Bottom Line Isn't! How to Build Value Through People and Organization (Ulrich and Smallwood).

This program is: CD-ROM; Synchronous E-learning (real-time); Asynchronous E-learning (self-paced)

Pre-assessments: Available

Number of modules: There are five modules; Length of each module: Varies

Total course time: One to two day versions.

Pre-work/Post-work: Neither pre-work nor post-work are required.

Help Desk Support: 8:00 am – 5:00 pm EST; Available in English (in-house, not outsourced); Operating systems on which this program is compatible: Windows 98, Windows 2000, Windows NT, Windows ME, Windows XP, Sun, Linux, Basic Internet access and CD-Rom access

Required Plug-ins: Internet access, CR-Rom access

Browser(s) on which this program is compatible: IE Explorer 5.x, IE Explorer 6.x, Netscape 6.x, Netscape 7.x, Netscape 8.x, Compatible with most programs

Name of coaching solution: RBL workshops help bring executive teams to a shared mindset and commitment to a compelling strategy that spans organizational boundaries. That builds bottom-line performance from both tangible and intangible assets, because performance comes from aligned execution of strategy and pursuit of common goals by all leaders.

Description of the coaching intervention and its purpose: Since each company’s executive team dynamics, structure, and objectives are unique, this workshop will be tailored to your own needs in close collaboration with your top team. During the workshop, participants clarify your strategy to ensure operational definitions and guidelines for what results your company is going to deliver and how its stakeholders will view it. This shared accountability for business and organization results reduces the chance of varying interpretations and increases the likelihood of successful strategy execution.

Standard number of coaching sessions per participant: One to two day sessions with work groups.

Standard duration of each coaching session: Varies, standard one - two day sessions.

Percentage of coaching delivery through:

- Face-to-Face Meeting 80%
- Phone Conversations 10%
- Email 10%
Senn-Delaney Leadership Consulting Group LLC

3780 Kilroy Airport Way
Long Beach CA 90056
562-426-5400
http://www.senndelaney.com

Sales contact:
Penny Madden
562 981-5211
pmadden@senndelaney.com

Additional office location:
53-55 New Bond Street,
London W1S 1DG, UK
011-44207-647-6060

FINANCIAL PROFILE
Ownership/Funding: Privately held
Percentage of revenue from leadership offerings delivered outside the U.S.: 16-20%

EMPLOYEE PROFILE
Total number of employees worldwide: 110
Total number of employees delivering leadership training solutions:
Based in U.S. – 50; Based Internationally – 15
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions: All consultants have previously held senior line positions in a variety of industries and have a minimum of 10 years of consulting experience.
Total number of developers of leadership training solutions: 15

ORGANIZATIONAL TENURE
Years in business: 20+; Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased leadership training solutions in the last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 50
Percentage of these client companies listed in the Fortune 500: 50%
Customer Service infrastructure/philosophy: Senn Delaney has a platform for frequent two-way communication with clients that allow them to get feedback about the quality of their services and processes. This includes outside interviewers getting intake from senior leaders as well as feedback forms. Input is integrated into new processes for continuous improvement. Senn Delaney does not provide client forums or use advisory boards or work with clients to gather data and evaluate the impact of the training in their workplaces.

COMPANY PROFILE
Leadership development philosophy: Leadership Development must include the senior team so that is owned by executives rather than HR. Organizations are shadows of their leaders. There is an insight-based process for creating fast, meaningful and lasting change.

LEADERSHIP TRAINING DELIVERY METHODS
Classroom training is offered. There are 10 distinct leadership classroom programs currently offered to clients that were conducted last year. There are also 10 distinct custom-designed programs that were conducted last year.
E-Learning programs are not offered, nor are stand-alone leadership training products. Ten blended learning leadership programs/curricula are offered.
Stanford Graduate School of Business Executive Education

Stanford University
518 Memorial Way
Stanford, CA 94305-5015
650-723-3341
http://www.gsb.stanford.edu/exed
http://www.gsb.stanford.edu/exed/programs.html

Sales Contact:
Monica Seghers Hayes
650-723-9120
seghers_monica@gsb.stanford.edu

FINANCIAL PROFILE
Ownership/Funding: Not-for-profit
Mergers/Partnership/Formal Alliance Activity: Program partnerships include Harvard Business School, University of Singapore, and American Electronics Association
Annual fiscal revenue: 2 Years Ago: $10-19 million; Last Fiscal Year: $10-19 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching): 2 Years Ago: $10-19 million; Last Fiscal Year: $10-19 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%

EMPLOYEE PROFILE
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions: All instructors are Stanford professors, with the exception of select sessions that are taught by visiting faculty or guest speakers who have been invited by Stanford faculty members.

ORGANIZATION TENURE
Years in business: 20+; Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased their leadership training solutions last fiscal year: 310
Percentage of these client companies listed in the Fortune 500: 10%
Top 5 competitors:
1. Harvard Business School
2. Wharton School
3. Kellogg School of Management
4. University of Chicago
5. London Business School

COMPANY PROFILE
Customer Service infrastructure/philosophy: All open enrollment programs are led by a faculty director and staffed by highly trained teams of program managers and coordinators. They also feature accommodations and dining staff who are dedicated to supporting Executive Education participants. Custom Executive Education programs are also serviced by business development personnel and feature close interaction between organizational leaders and Stanford faculty members.

Council members are selected for their distinction in the management profession and are appointed by the president of the University. They meet informally, twice a year, to review the direction, progress, opportunities, and needs of the School; to provide constructive criticism; and to offer advice and counsel. In the four decades since its founding, the Council has helped to shape the course of the school's curriculum, to organize an active Affiliate Program with leading firms, to develop a bank-financed loan program for students, and otherwise to act as "an informed and friendly" critic and advisor to the Business School.
Stanford works with custom program clients to craft a learning and implementation solution that fits their needs. The degree to which they conduct post-program analysis varies according to the desires of the client.

**The organization's leadership development philosophy:** Each one of their highly interactive executive programs offers an intensive, residential learning experience to explore leading-edge management concepts, test ideas against peers and the world’s leading business faculty, challenge assumptions, and ultimately leave with an in-depth understanding of the critical issues that can make the difference to the futures of organizations.

**The three aspects of the leadership program design that are most important to its success and effectiveness are:**

1.) **World Class Faculty** - Stanford is world renowned for its quality of faculty and research, and only experienced faculty members teach in their Executive Education programs.

2.) **Research-Based Management Frameworks & Models** - The programs go beyond business cases and best practices by introducing proprietary management research and models, developed by their own faculty, that enable companies to learn best practices and prepare for a changing future.

3.) **Senior-Level Executive Peer Participants** - Their Executive Education programs cater to senior level executives. All applicants to the programs are screened by faculty directors, who ensure that each program features a globally diverse mix of experienced participants from industries most relevant to the program.

**LEADERSHIP TRAINING DELIVERY METHODS:** Classroom training is offered. Classroom training represented 75-100% of their leadership revenue in the last fiscal year. E-Learning programs are not offered. Stand-alone leadership training products are not offered. Blended learning leadership programs/curricula are offered.

**STANDARD INFORMATION FOR ALL PROGRAMS**

**Standard materials provided with public programs:** A binder that includes a Campus Map, Case Method Note, Computing Information, Emergency Information Packet, Exercise Information, Faculty Biographies, General Information Document, and Medical Care Information. A book bag that includes Stanford Facts Book, Stanford Magazine, Graduate School of Business Facts Book, Stanford notepad, one blank disk, highlighter, and pen.

**Languages/Countries in which training programs are currently offered:** Programs are offered in English in the United States.

**Customization:** Select clients may bring in coaches or specific speakers that help the organization deepen the impact of the program. The Stanford GSB Faculty Director for each program works with the client organization’s senior executive team to build a program, which meets their goals and objectives.

**Pre-assessment:** Tools are available upon request. Additional fees will apply.

**Delivery options provided:** Stanford’s trainers/consultants deliver the program; there is no co-facilitation with client trainers, nor are there any train-the-trainer programs or program licensing.

**Program costs:** The cost for the program varies depending on the number of people in the program (45 to 60) and the amount of customization. The fees include room and board, plus an additional development fee. All programs are held on the Stanford campus.
**Maximum number of participants:** 60

**Number of trainers/consultants required:** Five to nine Stanford Graduate School of Business professors speak in each program.

The Stanford Graduate School of Business works closely with selected global companies to develop strategic solutions to their business challenges. Partnerships with organizations are characterized by collaboration between world-renowned Stanford faculty and senior organization executives. This combination assures relevance and maximum impact. Programs include a combination of interactive classroom sessions, case discussions, small group exercises, electronically mediated tools and intensive study groups to encourage participants to think strategically and effectively manage change in their organizations. Due to Stanford's small size, they work with selected organizations based upon faculty availability and research interests. All programs are delivered on the Stanford campus.

**Duration of client-sponsored program:** Programs typically are held for 6 days (Sunday check in, Friday departure), but they have held 4 and 5 day and 2 week programs for some clients.

**Format of client-sponsored program:** The format is a combination of trainer presentation, discussion and group activities. Role-plays and simulations can vary, depending upon client challenges.

**Pre-work in client-sponsored programs:** Participants receive selected readings and cases, which need to be prepared for the first few days of the program. Additional readings and cases are distributed on campus.

**Post-work in client-sponsored programs:** For selected clients they have done post-program evaluation work. All participants can elect to receive Stanford Connection, a past participant follow up email program identifying other development options as well as new research findings at the Stanford GSB.

**Standard materials provided with program:** The program fees and development fees include room and board, faculty teaching, study materials, classroom facilities, breaks, access to athletic facilities, and a faculty director and program manager to direct and ensure the program's effectiveness.

**Optional materials available:** Electronic media (e-surveys, CD-ROMs, program websites, etc.); online surveys and several assessment tools are available, at an additional cost.

**Reinforcement/Follow-up options:** Post-program web lectures and follow-up surveys are available for additional fees. Participants receive an email newsletter identifying other programs and recent research findings. Because they work with the senior management team, program goals determine the appropriate follow up.

**Standard way to measure program effectiveness and individual behavior change:** Stanford GSB works with senior management in the design of the custom program. These senior executives typically participate in the program as well, ensuring alignment of goals and objectives. For specific feedback, they use evaluations taken during the program, and frequently assist the company, if desired, with a follow-up survey. They have found the key to impact-driven change is to involve the senior leadership throughout the program and to treat the program as part of a process, not as a separate event.

**Other measurement options offered at additional cost:** Some survey options and web communications require extra fees.
Languages in which the client-sponsored program is currently offered: US English. GSB has several programs for Chinese clients where translation was required. The client organization was responsible for the additional fees.

Countries in which this client-sponsored program is currently offered: Only Stanford Graduate School of Business faculty members teach in the custom programs. These professors are full-time Stanford GSB faculty and are also teaching and conducting their own research. In addition, the Stanford GSB is a small school compared to its peers. Therefore, nearly all programs are held on the Stanford campus.

PROGRAM INFORMATION

Executive Management Program: Gaining New Perspectives
Modality: Classroom training

The single most important skill/competency area addressed in this program is:

- Business Acumen.

The secondary skills/competency areas addressed in this program are:

- Strategic Thinking/Decision Making
- Leading/Sponsoring Change Efforts
- Thinking Globally

Course description: The Executive Management Program offers you 6 days in an idyllic mountain retreat, the Stanford Sierra Conference Center located minutes from Lake Tahoe, immersed in strategic analysis and idea-sharing with leading management experts, outstanding faculty, and other business leaders like yourself who are striving to maintain an edge amidst the ruthless pace of today's business. Described by participants as a "mind-expanding experience" that provides "breakthrough learning," this program gives you a comprehensive, integrated view of finance, marketing, organizational behavior, political economy, and business strategy, while broadening your overall management perspective. This program has been in existence for 36 years. The date of the last significant update/revision (defined as >=30% content revision) is 02/15/2002.

Participant profile: The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Healthcare
- Technology & Communications
- Process & Manufacturing

Public Program: A six-day public program is available.

Prerequisites: The Executive Management Program is designed for senior managers with 10 years of management experience. Participants are carefully selected from a highly diverse range of industries to ensure a broad range of management experience and a global perspective.

This program is broken down into the following components:

- Trainer/Consultant Presentation 5%
- Discussion 15%
- Exercises/Quizzes 15%
- Group Activities/Role Plays 10%
- Case Studies 10%
- Faculty presentation 40%
- Individual study 5%
Pre-work/Post-work: Before the program begins, participants receive an advanced
mailing with materials such as a course outline, reading assignments, faculty research
and business cases to read and prepare. There is no post-work involved.

The total number of participants in the public, open enrollment version of this
program in the last fiscal year: 91; 67% reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available; Different client
leadership models and/or other client-specific needs are not available.

Customization: Select clients may bring in coaches or specific speakers that help the
organization deepen the impact of the program. The Stanford GSB Faculty Director for
each program works with the client organization's senior executive team to build a
program, which meets their goals and objectives.

Pre-assessment: Tools are available upon request. Additional fees will apply.
The total number of participants in the client-sponsored version of this program
last fiscal year: 400; 35% reside in the U.S.

Stanford Executive Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

Course description: The Stanford Executive Program, a six-week intensive academic
program in general management, offers experienced business leaders an in-depth
opportunity to explore the pivotal concepts of innovation, entrepreneurship, and
organizational vision and to apply their new insights to their own business practice. This
program has been in existence for 52 years. The date of the last significant
update/revision (defined as >=30% content revision) is 06/21/2004.

Participant profile: The primary audience included Senior VPs, C-level executives.
The secondary audience includes Directors, VPs.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Utilities
- Healthcare

Public Program: A six-week public program is available.

Prerequisites: All candidates should be seasoned, senior-level executives with
company-wide and/or country responsibilities, have at least 15 years of general
management experience, and work in an organization with revenue totals of more than
$100 million. If not a general manager, the candidate should be at the top level of a

255
This program is broken down into the following components:

- Trainer/Consultant Presentation 30%
- Discussion 20%
- Group Activities/Role Plays 10%
- Case Studies 30%
- Simulation 10%

Pre-work/Post-work: Before the program, participants receive an advanced mailing with materials such as a course outline, reading assignments, faculty research and business cases to read and prepare. In addition, participants are encouraged to distance themselves from their work environment, and set personal goals for the transformational experience of the program.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 105; 35% reside in the U.S.

Client Sponsored Program: A client-sponsored program is not available.

Executive Program for Growing Companies

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program are:
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Communication Skills
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Dealing with Ambiguity
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

Course description: Stanford's Executive Program for Growing Companies draws on the vast expertise of outstanding, world-renowned business school faculty to offer you the rigor of an intensive academic program coupled with the excitement of lively class discussions and stimulating conversation with your classmates -- successful men and women who, like you, are looking for ways to lead their firms into the next stage of growth. In this two-week program designed especially for leaders of new or rapidly growing companies with less than 1,000 employees and for leaders of autonomous business units or autonomous divisions of larger organizations, you will challenge assumptions, test your ideas against those of your classmates and the faculty, and leave with a new and deeper understanding of the issues that can make an important difference to your future and the future of your firm. This program has been in existence for 28 years. The date of the last significant update/revision (defined as >=30% content revision) is 07/28/2001.
Participant profile: The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs and Mid-level managers.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Government
- Utilities

Public Program: A two-week public program is available.

Prerequisites: Executive Program for Growing Companies is designed for senior managers of companies with fewer than 1,000 employees or for leaders of autonomous business units or autonomous divisions of larger organizations. Past participants have included the top managers of worldwide software firms, telecommunications concerns, food processing companies, think tanks, pharmaceutical manufacturers, wineries, and newspapers, among many others.

This program is broken down into the following components:
- Trainer/Consultant Presentation 30%
- Discussion 30%
- Group Activities/Role Plays 10%
- Case Studies 30%

Pre-work/Post-work: Before the program begins, participants are encouraged to document and submit a specific growth-related business challenge they are facing to be examined by faculty and peers during the program. Participants also receive an advance mailing with materials such as a course outline, reading assignments, faculty research and business cases to read and prepare before the program. There is no post-work involved.

The total number of participants in the public, open enrollment version of this program in the last fiscal year is: 56; 41% of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available.

This program consists of some trainer presentation, case studies, discussion, group activities and simulation.

The total number of participants in the client-sponsored version of this program last fiscal year is: 60; 35% of these participants reside in the U.S.

Additional information: Typically, clients who want this program are seeking to increase the general management perspective of their high potential managers. These managers have strong functional backgrounds and may need an opportunity to look at their organizations from a broader perspective. Business challenges, determined by the organization, can be used within the program, where executives apply the frameworks presented in classroom discussions to specific company challenges. A presentation is held at the end of the program and is witnessed by senior company executives. In all Stanford Graduate School of Business custom programs, the program content may be based on a specific open enrollment program, but content may be added to and dropped to meet specific organizational challenges.
Executive Program in Leadership: The Effective Use of Power

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- High Performing Teams
- Conflict Resolution
- Building Positive Relationships with Others
- Creation of vision and values for your company that are real and usable
- Development of a worldwide network of business leaders

Course description: This program enables participants to put effective, collaborative methods of leadership to work in an organization, and to leverage the leadership potential of all members of a team. In addition to focusing on developing their own leadership skills and personal influence, participants explore strategies for building a team of strong individuals who will support each other, deal with tough problems in an efficient manner, and take accountability for business results. This program has been in existence for seven years. The date of the last significant update/revision (defined as >=30% content revision) is 08/16/2002.

Participant profile: The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Utilities

Public Program: A five-day public program is available.

Prerequisites: Participants who would most benefit from this program are middle-level to senior-level business leaders in a variety of industries. At least 10 years of business experience is preferred. To maximize the benefits of this course, you are encouraged to bring one or two other key individuals from your team or organization.

This program is broken down into the following components:
- Faculty Lectures 60%
- Exercises/Quizzes 20%
- Case Studies 10%
- Simulation 10%

Pre-work/Post-work: In addition to a Leadership Questionnaire to distribute to key constituents in their organization, participants receive an advanced mailing with materials such as a course outline, reading assignments, faculty research and business cases to read and prepare. There is no public program post-work.

The total number of participants in the public, open enrolment version of this program last fiscal year was: 55. 65% of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available.

Additional information: Typically, clients who want this program are seeking to increase the general management perspective of their high potential managers. These managers have strong functional backgrounds and may need an opportunity to look at their organizations from a broader perspective. Business challenges, determined by the organization, can be used within the program, where executives apply the frameworks presented in classroom discussions to specific company challenges. A presentation is held at the end of the program and is witnessed by senior company executives. In all
Stanford Graduate School of Business custom programs, the program content may be based on a specific open enrolment program, but content may be added to and dropped to meet specific organizational challenges.

**Leading Change and Organizational Renewal**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Leading/Sponsoring Change Efforts.

**The secondary skills/competency areas addressed in this program are:**
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Creativity and Innovation
- Dealing with Ambiguity

**Course description:** Leading Change and Organizational Renewal provides participants with hands-on experience and an integrated set of state-of-the-art concepts and tools for managing change. Led by Professor Charles O'Reilly at the Stanford Graduate School of Business and Professor Michael Tushman at Harvard Business School, this program represents a unique collaboration between two of the leading researchers and practitioners in the area of organizational change and innovation. The program is based on the approaches and frameworks developed through their extensive work with global companies. This program has been in existence for six years. The date of the last significant update/revision (defined as >=30% content revision) is 11/09/2002.

**Participant profile:** The primary audience includes Senior VPs/C-level executives. The secondary audience includes Directors, VPs and Mid-level managers.

**The most common industries represented by clients purchasing this offering are:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Utilities

**Public Program:** A six-day public program is available.

**Prerequisites:** Leading Change and Organizational Renewal is designed for high-level executives responsible for the short- and long-term performance of an organization or business area. This program is appropriate for both product and service organizations across a wide range of industries, including market-leading firms to fast-growing, emerging companies. For maximum impact, organizations are encouraged to send management teams, such as a manager of a business unit or project team and other team members. Coming as a team focused on a specific organizational challenge ensures that the content of the program immediately transfers to practice.

**Pre-work/Post-work:** Before the program begins, participants receive an advanced mailing with materials such as a course outline, reading assignments, faculty research and business cases to read and prepare. Leading books authored by the faculty directors, Charles O’Reilly and Michael Tushman, are included. There is no post-work involved.
Reinforcement/Follow-up options and associated costs: In addition to taking home a CD-ROM learning toolkit, participants gain access to a resource-filled program website. Several other opportunities exist to extend the impact of the learning experience, including team facilitation services and customized executive programs built around the course concepts. Participants also receive a year's subscription to the Stanford Business School's quarterly magazine, access to Stanford KnowledgeBase (an online faculty research archive), an email subscription to the Stanford Executive Connection alumni newsletter, and invitations to future Stanford learning events and seminars.

The total number of participants in the public, open enrollment version of this program in the last fiscal year is: 59; 51% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Leading Change and Innovation, University of Chicago
2. Leading in Turbulent Times: Transforming Challenge into Opportunity, Kellogg
3. Leading in Times of Turbulence, Wharton

Client-Sponsored Program: A client-sponsored program is available.
**Thunderbird, The Garvin School of International Management Executive Education**

<table>
<thead>
<tr>
<th>Address</th>
<th>Additional office locations continued</th>
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<tbody>
<tr>
<td>15249 North 59th Avenue</td>
<td>Center for Business Skills Development</td>
</tr>
<tr>
<td>Glendale, Arizona 85306-6000 USA</td>
<td>Moscow, Russia</td>
</tr>
<tr>
<td>602-978-7000</td>
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<tr>
<td><a href="http://www.thunderbird.edu">http://www.thunderbird.edu</a></td>
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<td><a href="http://www.thunderbird.edu/execed">http://www.thunderbird.edu/execed</a></td>
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</tbody>
</table>

*Additional office locations:*
- Center for Business Skills Development
  - Moscow, Russia
- Thunderbird Europe Site
  - Universitaire de Formation et de Recherche 74160 Archamps, FRANCE
  - 33-450-316-778
- Liangmagiao Road Beijing 100017 China
  - 86-10-6467-2994
- Center for Business Skills Development
  - Lufthansa Centre Suite S11750
- Center for Business Skills Development
  - Sales contact: Jan Mueller
  - 602-978-7635
  - muellerj@t-bird.edu

**FINANCIAL PROFILE**

Ownership/Funding: Not-for-profit

Annual fiscal revenue: 2 Years Ago - $10-19 million; Last Fiscal Year - $10-19 million

Annual fiscal revenue from leadership offerings (excluding stand-alone coaching): 2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million

Percentage of revenue from offerings delivered outside the U.S.: 6-10%

Profitability based on last fiscal year: GAAP profitable

**EMPLOYEE PROFILE**

Total number of employees worldwide: 118

Total number of employees delivering leadership training solutions:
- Based in U.S.: 98; Based Internationally: 20

Total number of certified contractors delivering leadership training solutions:
- Based in U.S.: 0; Based Internationally: 7

**ORGANIZATION TENURE**

Years in business/Years as a leadership-training vendor: 15 - 19 years

**CLIENT PROFILE**

Number of client companies who purchased leadership training solutions last fiscal year: 257

Percentage of these client companies listed in the Fortune 500: 25%

**Top 5 clients:**
1. Exxon Mobil Corporation
2. SK Group
3. Baker Hughes
4. Mattel
5. Lucent

**Top 5 competitors:**
1. IMD
2. INSEAD
3. Babson
4. Center for Creative Leadership
5. Harvard

**COMPANY PROFILE**

Customer Service infrastructure/philosophy: Their client-centric approach to building and delivering programs is central to who they are as an organization, and a critical competitive advantage. Leadership programs revolve around clients’ most pressing issues, not vice-versa. Working with clients to gather data and evaluate the impact of their training in the workplaces, every program includes detailed assessment and feedback of program content, facilities, and learning objectives.
Section III – Program Files
Thunderbird

Investment in R&D as a percentage of leadership sales revenue: 11-15%

Leadership Development Philosophy: Thunderbird’s “Truly Global” approach to leadership development focuses on three target outcomes necessary to facilitate large scale organizational change in global organizations: Creation of new strategic directions aligned with an increase in the depth of leadership available throughout the worldwide organization, enhancement of organizational effectiveness across cultures and countries, and development of systems that build awareness and support for complex strategic transitions in a global organization. The partnership between corporations and Thunderbird Executive Education can only be described as a “meeting of minds,” a shared commitment between Thunderbird and the client organization. This commitment starts from the very beginning with the partnership design of the program, and continues through every stage of the development, delivery and evaluation process. Their partnership philosophy is reflected in the resources Thunderbird dedicates to making sure it understand the client’s strategic needs and program objectives, and in the company’s willingness to integrate Thunderbird into its change process.

The 3 aspects of a leadership program design that are most important to its success and effectiveness are:

1. Creation of new strategic directions aligned with an increase in the depth of leadership available throughout the worldwide organization. Thunderbird implements this aspect into every program.
2. Enhancement of organizational effectiveness across cultures and countries. Thunderbird implements this aspect into every program.
3. Development of systems that build awareness and support for complex strategic transitions in a global organization. Thunderbird implements this aspect into every program.

Leadership Training Delivery Methods:

Classroom training is offered. There are five public, open-enrollment programs. Client-sponsored programs are not available. Distinct custom-designed programs (conducted last year): 37 (not including multiple offerings of same program to same company)

Classroom Training represented 75 to 100% of its leadership revenue during the last fiscal year.

Two e-Learning programs are offered. e-Learning represented 0-24% of its leadership revenue during the last fiscal year. Stand-alone leadership training products are not available. Blended Learning leadership programs/curricula are offered. The Blended Learning option is available with their custom programs. Blended Learning represented 0-24% of their leadership revenue during the last fiscal year.

Standard Information for all Classroom-Training Solutions

Languages/countries in which programs are currently offered: Primarily English and USA. Some programs are offered in countries including Russia and China and other languages can sometimes be accommodated.

Standard materials provided with program: Course binder includes all case studies and articles; general materials include basic writing supplies (i.e. pen, pencil, highlighter, notepad, and canvas tote bag).

The standard way to measure program effectiveness and individual behavior change: Each participant is asked to complete a program evaluation form on the last day of the program. This form evaluates all aspects of the program content and
facilitators along with the program operations to include facilities, food, lodging, and general staff effectiveness.

Program content, small group discussion topics and case studies can be geared toward the client company's top issues. Also the program location, dates, and general agenda can be adjusted to meet the client's needs.

**Delivery options provided for client-sponsored programs:** Trainers/consultants deliver program, and can co-facilitate with client trainers.

**Duration and format of client-sponsored programs:** Both duration and format are based on client input along with the input from Thunderbird's program academic director and program manager.

### PROGRAM INFORMATION

#### Advanced Management Program for Oil & Gas Executives

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Assessing/Developing Your Personal Leadership Skills/Style

**The secondary skills/competency areas addressed in this program:**
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Time/Project Management
- Conflict Resolution
- Communication Skills
- Thinking Globally
- Business Acumen - Finance and Accounting

**Course description:** This rigorous two-week program is designed for senior industry managers around the world who seek to improve their leadership capabilities in an era of increased industry consolidation, heightened competition and complex new venture opportunities. Using current industry examples, the program examines how to energize effective, results-driven management.

This program is focused on analyzing oil and gas firms, their strategies and industry-specific issues within the context of several business disciplines. It emphasizes enhancing the ability to relate to, and work with, other members of general management from diverse backgrounds. Also, time is spent on relating management roles and functions to a broader strategic and competitive framework.

The course agenda includes approximately three business case studies and up to three small group discussions per day of the two week program. This program has been in existence since 1991.

**Participant profile:** The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs, Mid-level managers and High potential leaders.

**The most common industry represented by clients purchasing this offering:**
- Oil & Gas

**Public Program:** A 10-day public program is available.
Prerequisites: Most participants are senior-level managers who have 10 or more years of experience in management roles, have spent the majority of their careers in the energy industry, and currently manage a business unit, division or subsidiary.

This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 40%
- Case Studies 40%

Pre-work/Post-work: Participants are asked to read several case studies and articles in preparation for the first day of class. There is no post-work required.

This public program is currently offered in US English in the US and France.

Total number of participants in the public, open enrolment version of this program in the last fiscal year: 18; 33% of these participants reside in the U.S.

Client Sponsored Program: A client-sponsored program is not available.

Business Leadership Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Thinking Globally
- Cross Cultural Issues

Course description: Participants broaden understanding of the industry and grasp of strategic and competitive framework; understand implications of being a global company; get grounding in financial analysis; understand how to create value for customers and shareholders; understand the difference between leading and managing; reinforce positive aspects of corporate culture; and understand steps in a successful merger. This program has been in existence for three years. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2003.

Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders.

The most common industry represented by clients purchasing this offering:
- Energy

Client Sponsored Program: A client-sponsored program is available.

Duration and format of client-sponsored program: There are generally three small group sessions per day throughout the eight-day program; three to four cases are studied per day through a lecture/discussion format covering global competitiveness, global strategy, financial analysis, organizational culture and change, personal change, and mergers/acquisitions, among other topics. They are involved in several group and group cultural dinners.

Public Sponsored Program: A public program is not available.
Emerging Global Leader

Modality: e-Learning

The single most important skill/competency area addressed in this program is:

- Thinking Globally.

The secondary skills/competency areas addressed in this program are:

- Strategic Thinking/Decision Making.

Course description: Gain from the experience of peers and from Thunderbird faculty's global insights. Their Emerging Global Leader Online Certificate program is designed to offer the greatest core experience with ultimate flexibility. Using a structured e-learning environment, participants interact as they learn more about leadership and themselves. The elite Emerging Global Leader Online Certificate is earned upon completion of the six required program units. Each program unit is one week in length. This program is asynchronous (self-paced).

This program has been in existence for two years. The date of the last significant update/revision (defined as >=30% content revision) was 10/01/2002.

Participant profile: The primary audience includes Mid-level managers. The secondary audience includes Directors, VPs and High potential leaders.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Process & Manufacturing
- Technology & Communications

Number of modules: 6; Length of each module: 1-week.

Total course time: 7-weeks.

The percentage of each instructional technique for this program:

- Video <20%
- Static Pages 20-39%
- Scenarios <20%
- Quizzes <20%

Pre-work/Post-work: Reading before conversation online. There is no post-work required.

Standard materials provided with program: All online

The standard way to measure program effectiveness and individual behavior change: Evaluation to be completed by participant after each module.

Languages in which this program is currently offered: US English

Help Desk Support: Monday – Friday, 7:00 am - 5:00 pm; Available in English; In-house, (not outsourced)

MINIMUM TECHNOLOGY REQUIREMENTS

Operating systems on which this program is compatible: Windows 98, Windows 2000, Windows NT, Windows ME, Windows XP

Required Plug-ins: Flash, Windows Media Player, Adobe Acrobat Reader 5.0+, Thunderbird Browser

Minimum Bandwidth: Dial up

Browser(s) on which this program is compatible: IE Explorer 5x

Compatible/Compliant: Not SCORM compatible, Not AICC compatible, Not Section 508 Compliant
Global Leadership: Managing Cross Cultural Relationships for Business Results

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Communication Skills.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others
- Dealing with Ambiguity
- Building Partnerships and Alliances
- Thinking Globally
- Cross-cultural communications

Course description: The in-depth Global Leadership program teaches the skills necessary to develop and cultivate complex cross-cultural relationships in a global setting. Whether discovering how to motivate people of different talent pools, backgrounds, disciplines and generations, or developing a framework for effective problem solving across cultures, there's a lot for every leader to learn.

Topics covered include: Understanding your leadership and motivational styles and how they relate to individual, group and organizational effectiveness, learning how to empower your subordinates so that enhanced performance is encouraged and not resisted and exploring methods to lead change in your organization. Participants will also gain a greater understanding of the impact cultural differences have on leadership success in motivating a diversified workforce and apply effective communication tools to expand your communication range and ability.

Within the three-day program, attendees will participate in approximately 10 business case/lecture discussions with half of the sessions involving further in-depth action learning principles by the participants. This program has been in existence for three years. The date of the last significant update/revision (defined as >=30% content revision) was 02/20/2004.

Participant profile: The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.

The most common industries represented by clients purchasing this offering are:
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Agribusiness
- Aerospace

Public Program: A three-day public program is available. There are no prerequisites for the public program.

This program is broken down into the following components:
- Group Activities/Role Plays 50%
- Discussion/presentation of case studies 50%

Standard materials provided with public program: Tuition, lodging, some meals, and materials.
Optional materials available and associated costs: Professor Robert Moran's book: *Managing Cultural Difference*

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 28; 70% of these participants reside in the U.S.

Pre-work/Post-work: Participants are expected to review several case studies and/or articles in preparation for the first class day. There is no post-work involved.

Client Sponsored Program: A client-sponsored program is available.

Total number of participants in the client-sponsored version of this program last fiscal year: None, but program is available.

**Global Leadership Certificate Program**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Leading/Sponsoring Change Efforts
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Thinking Globally

**Course description:** Sessions are dynamic and interactive, sharing experiences drawn from Thunderbird's global business case studies, the faculty's academic and professional knowledge, and the day-to-day business challenges and insights of your fellow participants. Expand your knowledge base of 12 key global business topics. Perform better in business cross-functionally and cross-culturally. Increase your understanding of important, ongoing issues transforming the corporate landscape.

The Global Leadership Certificate Program is a convenient, non-degree business program that meets one evening per week for 12 weeks. This program has been in existence since 1994. The date of the last significant update/revision (defined as >=30% content revision) is 06/30/2004.

**Participant profile:** The primary audience includes Senior VPs, C-level executives, Directors, VPs, High potential leaders and Mid-level managers.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Process & Manufacturing
- Aerospace
- Telecommunication

**Public Program** A public program is available. The program consists of one meeting a week for 12 weeks. There are no prerequisites for the program.

This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 40%
- Case Studies 40%

Pre-work/Post-work: The participants are asked to read several case studies in preparation for the first evening of class. There is no post-work involved.

**Standard materials provided with program:** Coursework binders including case studies, biographic reviews of each program facilitator, and discussion questions.
The total number of participants in the public, open enrolment version of this program in the last fiscal year: 106; all of these participants reside in the U.S.

Client Sponsored Program: A client-sponsored program is available.

Global Leadership Program

*Modality:* Classroom training  

**The single most important skill/competency area addressed in this program is:**
- Problem Analysis/Problem Solving.

**The secondary skills/competency areas addressed in this program:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Thinking Globally
- Cross Cultural Communication
- Global Marketing
- Global Finance


There are generally three small group sessions per day throughout the eight-day program; three to four cases are studied per day through a lecture/discussion format covering global competitiveness, global strategy, financial analysis, organizational culture and change, personal change, and mergers/acquisitions among other topics. They are involved in several group and group cultural dinners. This program has been in existence since 2000. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

**Participant Profile:** The primary audience includes Senior VPs, C-level executives, Directors, VPs and High potential leaders.

**Most common industry represented by clients purchasing this offering:**
- Consumer Products

Global Project Leadership Program

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Time/Project Management.

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- High Performing Teams
- Dealing with Ambiguity
- Talent Management (Recruiting/Retaining/Developing Others)
- Increasing Performance of Others/Performance Management
- Thinking Globally
Course description: The Global Project Management program provides an executive-level foundation for emerging project leaders who need to hone skills in planning, controlling and leading projects that involve stakeholders from diverse geographies and cultures. In this class, participants learn to maintain project leadership focus, lead multicultural project teams, lead virtual project teams and identify and manage project risks. This program has been in existence for two years. The date of the last significant update/revision (defined as >=30% content revision) is 05/01/2004.

Participant profile: The primary audience includes Directors, VPs and Mid-level managers.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Aerospace

Public Program: A three-day public program is available.
There are no prerequisites for the program.

This program is broken down into the following components:
- Trainer/Consultant Presentation 20%
- Discussion 45%
- Case Studies 35%

Pre-work/Post-work: Participants are asked to read several case studies and articles in preparation for the first day of class. There is no post-work involved.

Standard materials provided with program: Tuition, lodging, meals, and course materials including case studies, articles, and discussion materials along with basic writing supplies.

The total number of participants in the public, open enrolment version of this program last fiscal year: 9; 11% of these participants reside in the U.S.

Client Sponsored Program: A client-sponsored program is available.

Pre-work/Post-work: Participants are asked to read several case studies and articles in preparation for the first day of class. There is no post-work involved.

Total number of participants in the client-sponsored version of this program last fiscal year: None.

Globalization: Merging Strategy with Action

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Strategic Thinking/Decision Making.

The secondary skills/competency areas addressed in this program are:
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Conflict Resolution
- Thinking Globally

Course description: This program provides a unique and finely honed global perspective, bringing strategy and action into sharp focus. It allows the participant to lead teams effectively and position their company advantageously for the challenges of the new global economy. As a result, participants improve their understanding of global firms, their strategies and various international issues in the context of one or more disciplines. They enhance their ability to handle the most critical issues in global competition and relate their company, role and functional area to a broader strategic and global setting. The course outline for this program consists of, on average, two small group discussions per day along with three lecture/case study discussions. This
program has been in existence for four years. Date of last significant update/revision (defined as >=30% content revision) is 03/05/2003.

**Participant profile:** The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs, Mid-level managers, Supervisors and/or front-line managers and High potential leaders.

**The most common industries represented by clients purchasing this offering are:**
- Financial Services & Insurance
- Technology & Communications
- Telecommunications

**Public Program:** A five-day public program is available.

**Prerequisites:** Program is designed for managers with five or more years of management experience, including job responsibilities that cross national borders and encompass a majority of functional areas.

**This program is broken down into the following components:**
- Trainer/Consultant Presentation 15%
- Discussion 35%
- Case Studies 35%
- Small Group Discussions 15% (4 to 5 participants are placed into each small group for further discussions relating to case study topics)

**Pre-work/Post-work:** Participants are expected to review several case studies and articles in preparation of the first class day. There is no post-work involved.

**Standard materials provided with program:** Program Price is all-inclusive (includes tuition, instruction materials, private room in on-campus Executive Inn and meals for the entire program).

**The total number of participants in the public, open enrolment version of this program in the last fiscal year:** 34; 44% of these participants reside in the U.S.

**Client Sponsored Program:** A client-sponsored program is available. Case studies and discussions geared toward the client company's issues can be built into the course; Number of days, location, and general agenda can also be customized to fit the client's needs.

**Pre-work/Post-work:** Participants are expected to review case studies and articles in preparation for the first class day. There is no post-work required.

**Standard materials provided with program:** Course binders including all case studies and articles to be used throughout the week; online peer discussion group and course page of activities, extra readings available to them by the professors and facilitators; basic writing materials (i.e. notepad, pen, pencil, highlighter, and canvas tote bag).

**Additional information provided:** A client-sponsored version can be developed as the need arises. Thunderbird was not approached during this past fiscal year.
Tuck Executive Education at Dartmouth

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http://www.tuck.dartmouth.edu/exec

Sales contact:
Joan Johnson
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FINANCIAL PROFILE
Ownership/Funding: Not-for-profit
Annual fiscal revenue: 2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%
Profitability based on last fiscal year: EBITDA profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 65
Total number of employees delivering leadership training solutions:
Based in U.S. – 45; Based Internationally – 10.
Total number of certified contractors delivering leadership training solutions: 0
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions: Senior, tenured and adjunct faculty of Tuck Business School at Dartmouth.
Total number of developers of leadership training solutions: 4
Years in business: 20+; Years as a leadership training vendor: 20+

CLIENT PROFILE
Number of client companies who purchased leadership training solutions in the last fiscal year (excluding stand-alone coaching, adventure-based programs, etc.): 75
Percentage of these client companies listed in the Fortune 500: 85%
Top client companies:
1. Hasbro
2. Corning
3. Deere & Company
4. Colgate
5. Palmolive
6. Avaya

Top 5 competitors:
1. Wharton
2. Columbia
3. Stanford
4. Harvard
5. University of Michigan

COMPANY PROFILE
Customer service infrastructure/philosophy: Tuck Executive Education is the premiere provider of leadership and executive development by partnering with select organizations to drive critical organizational initiatives and address strategic business issues through high-impact learning solutions.
Client forums/advisory boards: Through Learning consortiums like LearnShare, ICEDR, and by offering topical symposiums.

Working with clients to gather data and evaluate the impact of training in their workplaces: With custom engagements it is part of the scope of work. In the last 24 months three of their clients engaged them to do this. The evaluations consisted of a combination of post program 360-degree assessments, balanced scorecard and actual measurement of progress against specific business objectives.
Organization's investment in R&D as a percentage of leadership sales revenue: 11-15%

Leadership Development Philosophy: Dartmouth believes that successful leadership development should accomplish both a measurable change in competency level for an executive and alignment around improving action on critical business initiatives for the organization. To support that, they find that organizations are most profitable when they invest resources in developing their high potential contributors and that many learning initiatives deliver real results if they are also tied to an organizational objective, sponsored by a senior executive (C-suite level) and implemented across the organization.

LEADERSHIP TRAINING DELIVERY METHODS
Classroom Training is offered. There were four public, open-enrollment programs; one client-sponsored program; and 12 distinct custom-designed programs conducted last year. Classroom Training represented 50-74% of their leadership revenue in the last fiscal year. E-Learning programs are entirely on business acumen. E-Learning represented 0-24% of their leadership revenue in the last fiscal year. Stand-alone leadership training products are not offered. Blended Learning leadership programs-curricula are offered. The blended solutions are in custom engagements -- and typically include classroom, e-Learning, and action learning. Blended Learning represented 0-24% of their leadership revenue in the last fiscal year.

PROGRAM INFORMATION

Finance Essentials for Senior Managers

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making

Course description: Participants in this innovative and focused hands-on program develop and strengthen financial, accounting and valuation skills in order to achieve positive business results. They get a clear understanding of cutting-edge financial approaches and tools and the ways in which they can lead to greater accountability and transparency within companies and divisions. Senior executives also gain an understanding of corporate governance principles and Sarbanes Oxley compliance requirements. This program has been in existence for three years. The date of last significant update/revision (defined as >=30% content revision) is 10/15/2003.

Participant profile: The primary audience includes Senior VPs and C-level executives. The secondary audience includes Directors and VPs.

Most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Pharmaceutical, Bioscience

Public Program: A five-day public program is available.

Prerequisites: Participants should be senior directors, VP level and above in their organization.
The program design includes the following components:

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 20%
- Group Activities/Role Plays 20%
- Case Studies 20%

**Pre-work/Post-work:** Cases, articles and exercises along with a self assessment. There is no post-work.

**Standard materials provided with program:** Books, materials, cases, articles, key discussion summaries, financial math on spreadsheet tools and hand out resources.

**Languages/Countries in which this public program is currently offered:** In U.S. English in the United States.

**Total number of participants in the public, open enrollment version of this program last fiscal year:** 20; 90% of these participants reside in the U.S.

**Top 3 competitive offerings by program name and vendor:**
1. Finance, Wharton
2. Finance, Thunderbird
3. Finance, Harvard

**Additional information or comments:** Participants learn how financial decision-making affects leadership ability and strategy execution.

**Client-Sponsored Program:** A client-sponsored program is not available.

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**Gateway to Business Management Program**

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Strategic Thinking/Decision Making

**The secondary skill/competency area addressed in this program is:**
- Business Acumen

**Course description:** Gateway helps high-potential functional managers acquire the skills and perspective they need to think more strategically and transition within their companies. The program improves their understanding of business strategy, marketing, operations, financial analysis and successful leadership practices. Participants also learn how to integrate functional areas into overall management process, gaining increased capability, a broader perspective and critical skills and frameworks to become effective leaders. This program has been in existence for five years. The date of last significant update/revision (defined as >=30% content revision) is 02/15/2003.

**Participant profile:** The primary audience includes Supervisors and/or front-line managers. The secondary audiences include Mid-level managers and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities
- Engineering, Architecture, Construction
- Automotive, Aerospace

**Public Program:** A five-day public program is available.

**Prerequisites:** Participants must have a minimum of four years of management experience.
The program design includes the following components:

- Trainer/Consultant Presentation 10%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Simulation 20%

**Pre-work/Post-work:** Cases and articles with discussion questions. Post-work consists of a brief questionnaire at six month interval from program’s end to assess application of learning.

**Standard materials provided with program:** Books, cases, articles, supplemental readings, handouts of key points of discussion and presentation materials.

**Reinforcement/Follow-up options and associated costs:** Participants have the option of taking part in a brief assessment that addresses application of knowledge six months from the program’s end date. No additional cost incurred for this.

**Standard way to measure program effectiveness and individual behavior change:** Series of questions related to functional competence and leadership capability. No additional measurements are offered in an open enrolment version. The method of assessment in a custom engagement of this program is determined by the business objectives, company culture and preference of the client.

**Languages in which this public program is currently offered:** U.S. English

**Countries in which this public program is currently offered:** United States

**Total number of participants in the public, open enrolment version of this program last fiscal year:** 50; 65% of these participants reside in the U.S.

**Additional Information:** The public version of this program is offered twice each calendar year.

**Client-Sponsored Program:** A client-sponsored program is available.

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**Global Leadership 2020**

**Modality:** Classroom training

**The single most important skill/competency area addressed in this program is:**
- Thinking Globally.

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- High Performing Teams
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Building Partnerships and Alliances
- Business Acumen

**Course description:** This consortium program seeks to build global competitiveness within industries and organizations and develop the leadership ability of high-potential executives. Modules are taught on three different continents each year and they encourage learning in new ways - through experience sharing, cultural immersion and
active collaboration on real world projects. The program prepares participants to manage exponentially expanding markets, guide dramatic changes to business practices and corporate culture and lead effectively on a global scale. Participants attend in company teams, usually consisting of five to eight executives who partner with the Tuck team and lead immediate and long-term implementation of learning within the company. In this partnering framework, team members provide input on the curriculum and structure of the program. This program has been in existence for five years. The date of last significant update/revision (defined as >=30% content revision) is 01/05/2004.

**Participant profile:** The primary audience includes Senior VPs and C-level executives. The secondary audience includes Directors, VPs and High potential leaders.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services

**Public Program:** A public program is available.

**Prerequisites:** Cross-functional teams of executives from the Americas, Europe and Asia with ten or more years of experience, primarily in a functional area, positioned to assume global leadership responsibilities.

**Duration of public program:** Three week-long modules over one year with action learning projects between modules.

**The program design includes the following components:**
- Trainer/Consultant Presentation 20%
- Discussion 10%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 10%
- Site visits to local companies local political and community gatherings 10%
- Action learning projects within company teams between modules 20%

**Pre-work/Post-work:** Pre module articles, cases and reading assignments and working with each team to determine what their action learning project will be. Post module work to help in-company coaches assume the role of facilitator with guidance from faculty to implement action learning projects.

**Standard materials provided with program:** Books, materials, articles, key discussion points, coaching, facilitation and practitioner panels.

**Reinforcement/Follow-up options and associated costs:** Each consortium team briefs with Tuck’s team to determine the structure of the program modules and provide input on curriculum at no additional charge.

**Standard way to measure program effectiveness and individual behavior change:** Feedback from consortium teams.

**Languages in which this public program is currently offered:** U.S. English.

**Countries in which this public program is currently offered:** United States, Prague, France, India, China, Argentina

**Total number of participants in the public, open enrolment version of this program in the last fiscal year:** 40; 30% reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is not available.
Smith-Tuck Global Leaders Program for Women

*Modality:* Classroom training

**The single most important skill/competency area addressed in this program is:**
- Thinking Globally.

**The secondary skills/competency areas addressed in this program are:**
- Assessing/Developing Your Personal Leadership Skills/Style
- Strategic Thinking/Decision Making
- Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Building Partnerships and Alliances
- Business Acumen

**Course description:** This program is designed to address the leadership challenges that women face as they assume executive responsibilities for businesses or functional areas that are global in scope. Participants engage in discussions and activities focused on global strategy, global marketing, global finance, organization, resource allocation and leadership while they develop intercultural interaction skills. They leave the program with the frameworks, strategies, and skills needed for success in the global environment. This program has been in existence for three years. The date of last significant update/revision (defined as >=30% content revision) is 10/25/2003.

**Participant profile:** The audience includes Senior VPs, C-level executives, Directors and VPs.

**Most common industries represented by clients purchasing this offering:**
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities
- Pharmaceutical, bioscience

**Public Program:** A five-day public program is available.

**Prerequisites:** Participants must be senior director level and above and have responsibilities that are global in scope. Program is ideal for cross-functional, international teams of individuals from an organization as well as single participants.

**The program design includes the following components:**
- Trainer/Consultant Presentation 40%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 10%
- Case Studies 20%

**Pre-work/Post-work:** Cases, articles and discussion questions are given for pre-work. There is no post-work.

**Standard materials provided with program:** Books, case studies, articles, key discussion points and presentation handouts

**Reinforcement/Follow-up options:** Not applicable in public setting - no additional cost incurred.

**Languages in which this public program is currently offered:** U.S. English.

**Countries in which this public program is currently offered:** United States.
Total number of participants in the public, open enrollment version of this in the program last fiscal year: 34; 55% reside in the U.S.
Client-Sponsored Program: A client-sponsored program is not available.

Tuck Executive Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program are:
- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Motivating/Inspiring/Engaging Others
- Coaching Skills
- High Performing Teams
- Conflict Resolution
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Appreciating Diversity
- Creativity and Innovation
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Business Acumen
- Thinking Globally

Course description: The Tuck Executive Program offers senior executives a sharply focused immersion in critical aspects of global leadership and management topics while helping them achieve higher levels of business performance. Central to the integrated curriculum are frameworks for successful general management, managing change and innovation for growth and profitability and levers for personal change to become a more effective leader. TEP is designed for individuals whose careers have already been marked by achievement and who are expected to assume even greater responsibilities. Executives participate in a 360 Global Leadership assessment before the program begins and work with facilitators/coaches to prepare a personal action plan for implementation after the program ends. A post program assessment measures improvement and progress of the plan. During the program, participants are engaged in a learning process that enables them to critically examine the components of successful general management and leadership and to develop their own skills and ability. This program has been in existence for 30 years. The date of last significant update/revision (defined as >=30% content revision) is 03/15/2004.

Participant profile: The primary audience includes Senior VPs and C-level executives. The secondary audience includes Directors and VPs.
Most common industries represented by clients purchasing this offering:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities
- Bioscience
- Pharmaceutical
- Computers
- Personal products
- Building supplies and products
- Automotive
- Aerospace
- Oilfield technologies
- Petroleum products
- Apparel

Public Program: A three-week public program is available.

Prerequisites: Participants must have a minimum of 10 years of management experience and be sponsored by their employing organization as evidenced by a letter from a supervising officer or learning officer within the organization. The letter should outline the specific leadership strengths and weaknesses of the potential candidate and also describe his or her level of responsibility within the organization. Applicants must also provide a detailed job description, be willing to participate in the global leadership 360-degree assessment, or provide an in-company equivalent. Admitted candidates need to be relieved from their day-to-day work-related responsibilities and be present for all academic sessions in this three-week program.

Format of public program:

- Trainer/Consultant Presentation 20%
- Discussion 20%
- Exercises/Quizzes 10%
- Group Activities/Role Plays 20%
- Case Studies 20%
- Simulation 10%

Pre-work/Post-work: Admitted participants are required to read several chapters and take a test to determine their working knowledge of financial analysis to determine if they need to attend optional pre-enrolment sessions in financial analysis. All participants receive the first week's advance assignments and discussion questions approximately five weeks before the program start date. International executives have the option to participate in an English language comprehension presentation skills and cultural immersion pre-enrolment session for an additional fee. All participants must take part in the Global Leadership 360 Assessment or furnish the equivalent of an in-company assessment of global leadership capability. All participants are given the opportunity to take a post-program global leadership assessment six months after the program's end to gauge progress on personal action plans and to measure capability in the global leadership criteria areas. Additional executive coaching can be purchased at this point for a fee.

Standard materials provided with program: Assessment tool, quizzes/tests, books, cases, articles

Optional materials available: International executives may elect to participate in the optional pre-enrolment session (10 days) of English language comprehension, presentation skills and cultural immersion for an additional fee, as part of their participation in this program.
Reinforcement/Follow-up options: Included in the program fee is a six-month post program 360-degree assessment in Global Leadership capability and effectiveness. Participants may elect to arrange for additional executive coaching after the program ends. The length of the engagement determines the additional cost for this service.

Standard way to measure program effectiveness and individual behavior change: A balanced scorecard methodology is used to measure strategic performance during the program. A pre-program and post program 360-degree assessment is used to measure global leadership capability and effectiveness. Other measurement options offered at additional cost: Those individuals electing to participate in the English language pre-enrolment will be tested via interview before those sessions begin. They are again tested at the end of the experience and provided they have achieved the level of proficiency desired, they do receive an ACTFL certificate. This is included in the fee for the ESL pre-enrolment.

Languages/Countries in which this public program is currently offered: In U.S. English in the United States.

Total number of participants in the public, open enrollment version of this program in the last fiscal year: 25; 55% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Columbia Executive Program, Columbia University
2. Harvard Management Program, Harvard University
3. UCLA Executive Program, University of California

Client-Sponsored Program: A client-sponsored program is not available.
FINANCIAL PROFILE
Ownership/Funding: Not-for-profit
Annual fiscal revenue: 2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Annual fiscal revenue from leadership offerings (excluding stand-alone coaching):
2 Years Ago - $0-9 million; Last Fiscal Year - $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 6-10%

EMPLOYEE PROFILE
Total number of employees delivering training solutions: Based in U.S. – 85
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:
All faculty who teach in UCLA's executive education programs are experts in their field. Most are tenured or tenure-track Anderson School faculty, complimented when needed, by faculty experts from around the world.

ORGANIZATION TENURE
Years in business/Years as a leadership training vendor: 20+

CLIENT PROFILE
Percentage of client companies listed in the Fortune 500: 50%
Top 5 client companies:
1. Johnson and Johnson
2. National Association for Multi-Ethnicity in Communications
3. Northrop Grumman
4. PepsiCo
5. IBM
Top 5 competitors:
1. University of Michigan
2. University of Chicago
3. Northwestern
4. Columbia University
5. Stanford University

COMPANY PROFILE
Customer Service infrastructure/philosophy: As a major research university, quality is of primary importance to UCLA. Each program is honed after every offering to better serve the program goals and participant needs. Each faculty director works closely with staff and clients to ensure that goals are met. Executive Education program quality is assured through a combination of factors: They use predominantly senior UCLA Anderson faculty experienced with executive education and with business through their consulting, research, or prior experience. The faculty has also been recognized by students for their teaching ability. They rarely go outside the UCLA faculty to conduct client programs. When they must do so, program faculty directors are heavily involved in the selection process to ensure they maintain high standards of program development and delivery. Programs are designed in conjunction with key representatives from their client organization, thereby ensuring that they thoroughly understand and respond to client organization requirements. As much as practicable, they select cases, readings, and classroom discussion topics that are directly related to their client firm, their industry, or their customers. Each program module is individually evaluated both quantitatively and qualitatively. Detailed results of this assessment are shared with the sponsoring manager or executive and with the faculty, and opportunities for improvement are discussed and incorporated into the program with the next module wherever possible. A
comprehensive program post-mortem is conducted with the sponsoring manager and other key individuals in the client organization. All findings are incorporated into future programs.

All programs conducted by the UCLA Anderson's Office of Executive Education Programs are evaluated at several levels: by the participants, by the client (for custom programs), and by the faculty/staff of UCLA Anderson. The participants complete evaluations for each session and extensive overall evaluations of the total program and their perception of whether the program met learning objectives. For custom programs, clients are asked to evaluate program efficacy through feedback from participants' supervisors, observance of key sessions, and through the results of Business Improvement Projects. Faculty and UCLA staff evaluates the program after each module and after the close of the program. This internal post-mortem is an established tradition of UCLA Anderson. In it, sessions are evaluated for accomplishment of learning objectives, faculty delivery quality, and participant comprehension and engagement. Alterations are made, if necessary, between repetitions of each class to ensure program quality.

Measuring ROI on Management Education: There is much anecdotal evidence that management development programs are a smart investment, but until now, there has been no longitudinal research to prove their efficacy. UCLA Anderson School's Professor David Lewin has undertaken extensive research that measures the positive impact of management education on a company's financial performance. UCLA offers custom program clients the option to: a) develop additional support for their investment with empirical proof that correlates increased participation in management education with improved financial results, and b) establish formulae for measuring the effect of executive education on management and leadership skills, as well as on an executive's ability to achieve positive change to organizational structure, culture, and business outcomes.

UCLA's leadership development philosophy: UCLA's Office of Executive Education Programs has been designing and conducting management development programs for more than 50 years. Their mission is to elevate the practice of management by projecting faculty expertise into the business arena and leading client expectations. They believe in delivering cutting-edge executive programs, each with a unique combination of global management perspective, leadership acumen, and strategic thinking skills. As a major research university, quality is of primary importance to UCLA. Each program is honed after every offering to better serve the program goals and participant needs. Each faculty director works closely with staff and clients to ensure that goals are met. Executive Education program quality is assured through a combination of factors. They use predominantly senior UCLA Anderson faculty experienced with executive education and with business through their consulting, research, or prior experience.

LEADERSHIP TRAINING DELIVERY METHODS: Classroom training is offered. There are 12 different (distinct) leadership classroom programs currently offered to clients as public, open enrollment programs. Classroom training represented 50-74% of their leadership revenue in the last fiscal year. E-learning programs are not offered, nor are stand-alone leadership training products. Blended learning leadership programs/curricula are offered.
Additional information: The UCLA Anderson School of Management is perennially ranked among the top-tier business schools in the world. Award-winning faculty renowned for their research and teaching, highly selective admissions, successful alumni and world-class facilities combine to provide an extraordinary learning environment. UCLA Anderson provides management education to more than 1,300 students enrolled in full-time, part-time and executive MBA programs, as well as academic master’s and doctoral programs. In addition, the Office of Executive Education Programs hosts nearly 2,000 executives annually, many of whom come from international locations, representing all continents and almost 50 countries. UCLA’s executive education programs rely heavily on the UCLA Anderson’s critically acclaimed faculty, which includes some of the most outstanding educators and researchers from the academic and business worlds. Executive education faculty integrate their ground-breaking research, teaching, practical experience and consulting relationships with major organizations from around the globe to expertly deliver knowledge and techniques that combine leading-edge academic aspects of management with real-world applications. Classroom discussions come alive with topical relevance. By synthesizing their expertise; today's business, political, and social topics; and the business challenges of executive participants, executive education faculty deliver frameworks and strategies that enable participants to build an important management toolkit that can be applied as soon as the participant gets back to work and for years to come.

Pre-work/Post-work for public programs: Participants receive preparatory materials in advance of the program. Participants also complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants' firms. There is no post-work for public programs required.

Standard materials provided with the program: Program fee includes tuition; all program materials, including requisite books, case materials, articles, and most meals.

UCLA's standard way to measure program effectiveness and individual behavior change: UCLA's programs are constantly being evaluated to ensure optimal program effectiveness. Each session and the overall program are evaluated on three levels: by participants, faculty, and staff. Changes are made to reflect the changing business environment, to update materials, and to address any areas of concern.

Languages/Countries in which training solutions are currently offered: The programs are currently offered in U.S. English in the United States.

Customization: Both complete custom design and limited customization are available. UCLA will work with individual clients to meet their objectives and timeframes.

Pre-assessments: Participants complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants' firms. More formal pre-assessment studies can be done; cost varies depending on scope of project and client requirements.

Delivery options: Trainers/consultants deliver programs and can co-facilitate with client trainers. Train-the-trainer programs and program licensing are not available.

Costs, maximum number of participants and number of trainers/consultants varies depending on client requirements and specifications of the program. UCLA can price programs according to client specifications. Typically custom program fees include all instruction, faculty coordination, administration by the UCLA Office of Executive Education Programs staff, limited curriculum development, all educational materials
including a management simulation, if applicable, program certificates, and faculty travel and accommodations. The non-recurring curriculum development cost can be estimated separately or included in the program fee. The primary factors that impact cost variations are: number of program offerings; length of program sessions; class size; customized curriculum; and educational materials including textbooks, cases, and/or digital media.

**Duration of client-sponsored program:** Varies for each client, per client requirements and specifications.

**Format of client-sponsored program:** Varies for each client, per client requirements and specifications. Designed by UCLA Anderson School of Management’s renowned faculty, the program sessions combine traditional lectures with small group breakout sessions, case studies, and a specialized business improvement project. UCLA Anderson faculty are keenly aware of executive learning methodologies. They recognize that there is a vital need to involve participants in active learning. Business cases and industry relevant examples will provide vehicles for engaging participants’ interest. These examples allow participants to apply the material covered in the classroom to real-world and relevant settings.

**Pre-work/Post-work for client-sponsored programs:** Participants receive preparatory materials in advance of the program. Participants also complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants’ firms. UCLA provides the option to create and develop a web-based platform that will provide a central community for communication among students, faculty and program administrators. This community will facilitate program post-work, including solutions to participants' Business Improvement Projects.

**Optional materials available and associated costs:** UCLA can provide optional services such as coaching, site visits, management simulations, business improvement projects, consulting, etc. for costs, which shall be determined on an individual client basis.

**Reinforcement/follow-up options and associated costs:** There is much anecdotal evidence that management development programs are a smart investment, but until now, there has been no longitudinal research to prove their efficacy. UCLA Anderson School’s Professor David Lewin has undertaken extensive research that measures the positive impact of management education on a company’s financial performance. As an option, they would welcome the opportunity to work with clients to measure this impact. This measurement tool helps to: a) develop additional support for the organizational investment in custom executive education programs with empirical proof that correlates increased participation in management education with improved financial results, and b) establish formulae for measuring the effect of executive education on management and leadership skills, as well as on an executive’s ability to achieve positive change to organizational structure, culture, and business outcomes. There is an additional fee for this option.

**The standard way to measure program effectiveness and individual behavior change:** UCLA's programs are constantly being evaluated to ensure optimal program effectiveness. Each session and the overall program are evaluated on three levels: by participants, faculty, and staff. Changes are made to reflect the changing business environment, to update materials, and to address any areas of concern. One standard way to measure the effectiveness of a custom executive program is to measure the results of the Management or Business Improvement Project. If time allows, UCLA
Section III – Program Files
UCLA Anderson School of Executive Education

recommends that most custom programs include a Business Improvement Project. A key to the success of these programs will be for participants to learn to apply the concepts, frameworks, and tools they are learning in an environment where they can receive constructive feedback. This will be accomplished in this program via a "Business Improvement Project" or living case that is based on an actual corporate scenario for the client organization. The living case also may be termed action learning projects, applied business cases, or management improvement projects. In collaboration with corporate leadership, they will identify business issues or needs suitable for application of the course learnings. The living case can be addressed either by individuals or as a small group, depending on the scope of the issue. This action-learning-based approach typically provides workable solutions that can be implemented within the organization. In addition, participants enhance their own problem-solving skills by engineering solutions for their organization’s business challenges.

Advanced Program in Human Resource Management

**Modality:** Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen (general)

The secondary skills/competency areas addressed in this program are:
- Talent Management (Recruiting/Retaining/Developing Others)

**Course description:** With a focus on creating organizational value through exceptional HR management, this program is the only one of its kind to examine ROI on executive development. You'll also learn to create a seat for yourself and your HR strategy at the executive table, take away cutting-edge HR strategies, and develop your own organizational leadership map. This program has been in existence since 1986. The date of the last significant update/revision (defined as >=30% content revision) is 10/04/2004.

**Participant profile:** The primary audience includes Senior VPs/C-level executives and Directors/VPs. The secondary audience includes Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** A five-day public program is available.

**Prerequisites:** Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 30%
- Discussion 30%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 20%
- Case Studies 15%

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 35; 40% of these participants reside in the U.S.
Top 3 competitive offerings by program name and vendor:
1. Advanced Human Resource Executive Program, University of Michigan

Client-Sponsored Program: A client-sponsored program is available.

African American Leadership Institute

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skill/competency area addressed in this program is:
- Appreciating Diversity.

Course description: African American executives experience the workplace in ways both common to and divergent from the mainstream. The isolation and frustration many African American managers experience in their careers have tremendous implications for their long-range success and for those that follow them. UCLA's African American Leadership Institute distills the wisdom and experience of the nation's top African American corporate leaders and public figures and identifies the tools required to prepare today's African American executives for tomorrow's organizational leadership. During 5 days of provocative and stimulating discussion on the state of African American leadership, participants address key issues from a personal, interpersonal, and organizational perspective and take away a practical tool kit to increase productivity, leverage, and value to their organizations. This program has been in existence since 1998. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2002.

Participant profile: The primary audience includes Directors, VPs, Mid-level managers and High potential leaders. The secondary audience includes Senior VPs, C-level executives.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Utilities

Public Program: A five-day public program is available.

Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 45; 93% of these participants reside in the U.S.

Top competitive offerings by program name and vendor:
1. African American Leadership Program, Center for Creative Leadership
2. Mid-level Manager's Symposium, Executive Leadership Council

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: No
Creativity and Innovation in the Organization Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Creativity and Innovation

The secondary skills/competency areas addressed in this program is:
- Strategic Thinking/Decision Making.

Course description: This unique program enables leaders to tap into the creativity around them and to transform creative, innovative ideas into successful business solutions. Great for firms that are exploding with growth OR in need of rejuvenation! This program has been in existence since 1993. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

Participant profile: The primary audience includes Senior VPs, C-level executives and Directors, VPs. The secondary audience includes Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A five-day public program is available.

Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 45%
- Discussion 45%
- Case Studies 5%
- Audio Visual Presentation 5%

Pre-work/Post-work: Participants receive preparatory materials in advance of the program. Participants also complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants’ firms. The Creativity and Innovation in the Organization Program serves as a think tank in which participants generate creative ideas and transform them into real, actionable, and immediate business solutions. To extend the educational experience established in the program, UCLA’s Office of Executive Education Programs has created the unique "A-B-C" Creativity Network. The "A-B-C" Creativity Network creates a web of sustained relationships among managers from diverse organizations. Dedicated to mutual support and bound by mutual trust, it provides an arena for action-based learning to assist participants and their organizations to adapt to an uncertain future, embrace change, and maximize competitive business advantage. All organizations that enroll participants in the program qualify for membership in the "A-B-C" Creativity Network. During regular and periodic meetings, participants come together to build upon program learnings and share creative solutions across organizational boundaries.

Standard materials provided with program: Program fee includes tuition; all program materials, including requisite books, case materials, articles, software; and most meals.

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 45; 87% of these participants reside in the U.S.
Top 3 competitive offerings by program name and vendor:

1. Leading Creatively, Center for Creative Leadership
2. Leading Change and Organizational Renewal, Harvard
3. Building, Leading and Sustaining the Innovative Organization, MIT Sloan

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: None

UCLA Director Training and Certification Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Board of Directors leadership and management.

The secondary skill/competency area addressed in this program is:
- Business Acumen

Course description: Designed for corporate directors and officers of pre-public and newly public companies, this intensive program features more than a dozen world-class experts who cover every aspect of being a successful director. Topics include SEC regulations, FASB considerations, Exchange rules, auditing issues, financial disclosure, and current best practices in corporate governance. If you are a new director, about to become a director, or just want to be a better director, the UCLA Director Training and Certification Program is an important and valuable investment of your time. With the increased frequency of directors being sued by shareholders, what you learn in this program could protect you and your firm from liabilities caused by technical errors and missteps. And, directors who successfully complete the program and pass a written examination (optional) become certified directors and may be eligible for lower rates on D&O insurance. This program is accredited by the ISS and may help to improve your Corporate Governance Quotient (CGQ). Held at UCLA Anderson, the program also features three stand-alone board committee modules on Audit, Governance and Nominating, and Compensation which may be taken separately or in addition to the UCLA Director Training and Certification Program. This program has been in existence since 1999. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2002.

Participant profile: The primary audience includes Senior VPs, C-level executives. The secondary audience includes Directors, VPs, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Professional Services
- Government
- Utilities
- Biotechnology

Public Program: A 2-1/2 day public program is available.

Prerequisites: Applicants must meet selection criteria; attendees are board members from pre-public and newly public companies.

This program is broken down into the following components:
- Trainer/Consultant Presentation 50%
- Discussion 50%

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 80; all of these participants reside in the U.S.
Top competitive offerings by program name and vendor:
1. Making Corporate Boards More Effective, Harvard
2. Director’s College, Stanford Law School
3. Directors Consortium, Wharton

Client-Sponsored Program: A client-sponsored program is available.
Prerequisites: None

UCLA Executive Program
Modality: Classroom training
The single most important skill/competency area addressed in this program is:
• Business Acumen

Course description: The UCLA Executive Program is designed to enhance the professional development competencies of executives and managers. In the company of other leading executives, you will acquire the management expertise, leadership skills, and critical business perspectives to enhance your career and make a significant impact on your organization. Address the latest innovations in management education, understand and integrate the functional areas of business, and apply techniques for effective analysis and decision-making. Taught by world-renowned faculty, you will learn to maximize the value and application of the latest management knowledge and techniques while integrating it into your corporate equation. This program has been in existence since 1954. The date of the last significant update/revision (defined as >=30% content revision) is 01/01/2000.

Participant profile: The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
• Financial Services & Insurance
• Technology & Communications
• Healthcare
• Process & Manufacturing
• Retail, Hospitality
• Professional Services
• Government
• Utilities

Public Program: A public program is available. The program runs either one night a week for 26 weeks or two nights per week for 13 weeks.
Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
• Trainer/Consultant Presentation 35%
• Discussion 30%
• Group Activities/Role Plays 5%
• Case Studies 20%
• Simulation 10%

Languages/Countries in which training solutions are currently offered: This public program is currently offered in the English language in the USA.

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 100; 90% of these participants reside in the U.S.
Top 3 competitive offerings by program name and vendor:

- Managing the 21st Century, Pepperdine
- The Management Program, University of Washington
- Management Development, Kellogg

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: None

<table>
<thead>
<tr>
<th>Latino Leadership Institute</th>
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<tr>
<td><strong>Modality:</strong> Classroom training</td>
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The single most important skill/competency area addressed in this program is:

- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skills/competency areas addressed in this program is:

- Appreciating Diversity

Course description: One of the few programs of its kind, the UCLA Latino Leadership Institute is designed for Latino and Hispanic executives and high-potential managers. Participants address leadership and management issues in an engaging and forthright manner and learn ways to become stronger leaders and managers. Participants in the Latino Leadership Institute will explore and find out how to best use Latino social, economic, cultural, and political power; take away specific career management tools to enhance their own careers and learn to position their organizations to leverage the power of Latino stakeholders. Participants take away a practical tool kit to increase productivity, leverage, and value to their organizations. This program has been in existence since 1999. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

Participant profile: The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A five-day public program is available. Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior- level managers.

This program is broken down into the following components:

- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 35; 90% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:

1. Minority Business Executive Program, Tuck
2. Advanced Minority Business Executive Program, Tuck
3. Pepperdine Business Management Certificate, Pepperdine

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: None
Lesbian, Gay, Bisexual, and Transgender Leadership Institute

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skill/competency area addressed in this program is:
- Appreciating Diversity.

Course description: The UCLA Lesbian, Gay, Bisexual, and Transgender (LGBT) Leadership Institute addresses universal leadership issues and related LGBT concerns, such as: managing career identity while maintaining personal authenticity; decreasing feelings of isolation; and knowing whom to trust and how to best work with allies and competitors. The intensive, five-day program also examines ways that organizations are leveraging the power of LGBT stakeholders for increased profitability. Participants take away a practical tool kit to increase productivity and add value to their organizations. Explore issues of trust within the community and without and find the best ways to work with both allies and competitors. As a participant, you will discuss ways to position your organization to harness opportunity and leverage the power of its LGBT stakeholders. This program has been in existence since 2001. The date of the last significant update/revision (defined as >=30% content revision) is 06/01/2002.

Participant profile: The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A five-day public program is available. Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior- level managers

This program is broken down into the following components:
- Trainer/Consultant Presentation 30%
- Discussion 25%
- Group Activities/Role Plays 15%
- Case Studies 10%
- Simulation 15%

There is no pre-work or post-work required.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 50; 97% of these participants reside in the U.S.

Top competitive offerings by program name and vendor:
1. African American Leadership Program, Center for Creative Leadership
2. Mid-level Manager's Symposium, Executive Leadership Council

Client-Sponsored Program: A client-sponsored program is available.
Managerial Negotiations Program

**Modality:** Classroom training  
**The single most important skill/competency area addressed in this program is:**  
- Negotiations Skills  
**The secondary skill/competency area addressed in this program is:**  
- Conflict Resolution  

**Course description:** This hands-on program delivers step-by-step approaches to leading your company by getting the negotiation results you want. It is designed for managers who negotiate to bargain strategically, make smart deals, manage conflicts, and to achieve other desired outcomes. It is especially applicable for executives in entertainment, real estate, and aerospace. This program has been in existence since 1999. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

**Participant profile:** The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and High potential leaders.

**The most common industries represented by clients purchasing this offering are:**  
- Financial Services & Insurance  
- Technology & Communications  
- Healthcare  
- Process & Manufacturing  
- Retail, Hospitality  
- Professional Services  
- Government  
- Utilities  

**Public Program:** A 2-1/2 day public program is available.

**Prerequisites:** Applicants must meet selection criteria; attendees are mid- to senior-level managers.

**This program is broken down into the following components:**  
- Trainer/Consultant Presentation 15%  
- Discussion 20%  
- Group Activities/Role Plays 45%  
- Case Studies 15%  
- Simulation 5%  

**Pre-work/Post-work:** Participants receive preparatory materials in advance of the program. Participants also complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants’ firms. There is no post-work required.

**The total number of participants in the public, open enrollment version of this program in the last fiscal year:** 35; 80% of these participants reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is available.

**Prerequisites:** None

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Managing the Information Resource Program

**Modality:** Classroom training  
**The single most important skill/competency area addressed in this program is:**  
- Information Technology acumen  
**The secondary skill/competency area addressed in this program is:**  

**Course description:** UCLA’s Managing the Information Resource delivers strategies that IT professionals can employ to effectively balance the demands of being both a
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UCLA Anderson School of Executive Education

technology guru and a vital member of the executive team. The program focuses on making the IT function a strategic (and more visible) partner in meeting bottom line, organizational goals and on the leadership and management issues faced by IT professionals such as CIOs and their direct reports. This program has been in existence since 1980. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2002.

**Participant profile:** The primary audience includes Directors, VPs. The secondary audience includes Senior VPs, C-level executives, Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** A five-day public program is available.

**Prerequisites:** Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:

- Trainer/Consultant Presentation 25%
- Discussion 35%
- Group Activities/Role Plays 10%
- Case Studies 10%
- Simulation 10%

**Pre-work/Post-work:** Participants receive preparatory materials in advance of the program. Participants also complete a pre-program survey, which is used to determine their knowledge and interests and upon which program content is tailored. Faculty members use case examples from participants’ firms. There is no post-work required.

**Standard materials provided with program:** Program fee includes tuition; all program materials, including requisite books, case materials, articles, and software; and most meals.

The public program is currently offered in US English. The Countries in which this public program is currently offered is the United States.

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 35; 85% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:

1. Management in Technology Organizations, Carnegie Mellon
2. Delivering Information Services, Harvard
3. Making Business Sense of IT, MIT

**Client-Sponsored Program:** A client-sponsored program is available.

**Prerequisites:** None

**UCLA Medical Marketing Program**

**Modality:** Classroom training

The single most important skill/competency area addressed in this program is:

- Business Acumen, Marketing.

The secondary skill/competency area addressed in this program is:

- Strategic Thinking/Decision Making.

**Course description:** The UCLA Medical Marketing Program delivers strategic
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UCLA Anderson School of Executive Education

frameworks and innovative marketing techniques for medical marketers in the pharmaceutical, device, diagnostic, and biotechnology industries. Held in collaboration with the Medical Marketing Association and in its 27th year, the program empowers medical marketers to allocate resources for maximum ROI and gain support for their decisions by properly measuring marketing productivity. This program has been in existence since 1977. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2001.

Participant profile: The primary audience includes Directors, VPs, Mid-level managers and High potential leaders. The secondary audience includes Senior VPs, C-level executives.

The most common industries represented by clients purchasing this offering are:
- Healthcare
- Medical Device, Medical Diagnostic, Biotechnology

Public Program: A five-day public program is available.

This program is broken down into the following components:
- Trainer/Consultant Presentation 40%
- Discussion 50%
- Case Studies 10%

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 115; 93% of these participants reside in the U.S.

Competitive offerings by program name and vendor:
- Windhover Program for Pharmaceutical and Biotech Executives, Wharton
- Strategic Marketing for the Healthcare Industry, Kellogg

Client-Sponsored Program: A client-sponsored program is available.

Mergers and Acquisitions Program

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Building Partnerships and Alliances

Course description: Designed by the legendary Professor J. Fred Weston, this program delivers the most encompassing strategies available. You'll explore the strategies covering every aspect of mergers and acquisitions, strategic alliances, corporate restructuring, and other growth options, from evaluation through implementation. This program has been in existence since 1998. The date of the last significant update/revision (defined as >=30% content revision) is 09/01/2004.

Participant profile: The primary audience includes Senior VPs, C-level executives and Directors, VPs. The secondary audience includes Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A six-day public program is available.

Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior-level managers.
This program is broken down into the following components:
- Trainer/Consultant Presentation 40%
- Discussion 40%
- Group Activities/Role Plays 10%
- Case Studies 10%

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 70; 88% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Mergers & Acquisitions, Stanford
2. Mergers & Acquisitions, Wharton
3. Mastering Mergers, Acquisitions and Strategic Alliances, Duke

Client-Sponsored Program: A client-sponsored program is available.

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**Strategic Financial Decision Making Program**

*Modality:* Classroom training

The single most important skill/competency area addressed in this program is:
- Business Acumen

The secondary skills/competency areas addressed in this program:
- Finance and Accounting Management

**Course description:** This program enables you to make the most strategically sound decisions with your data. Both accounting and financial managers in need of a solid foundation of accounting and finance knowledge, and financial managers desiring the most up-to-date financial decision-making strategies will benefit from this program. This program has been in existence since 2003.

**Participant profile:** The primary audience includes Senior VPs, C-level executives and Directors, VPs. The secondary audience includes Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

**Public Program:** A public program is available. The program runs one night a week for eight weeks.

**Prerequisites:** Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 40%
- Discussion 35%
- Case Studies 25%

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 30; 100% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Financial Analysis for Non-financial Managers, University of Chicago
2. Finance and Accounting for the Non-financial Executive, Columbia
3. Finance and Accounting for the Non-financial Manager, Wharton

Client-Sponsored Program: A client-sponsored program is available.

**Prerequisites:** None
Women's Leadership Institute

Modality: Classroom training

The single most important skill/competency area addressed in this program is:
- Assessing/Developing Your Personal Leadership Skills/Style

The secondary skill/competency area addressed in this program is:
- Appreciating Diversity

Course description: Designed to address the critical life balance tools, leadership skills, management issues, and career-enhancing strategies for female executives, the UCLA Women's Leadership Institute brings together expert faculty, executive-level presenters, and an intergenerational group of accomplished participants to discuss the state of women in management and women's leadership issues. Participants examine mentoring, pipeline, management and leadership, and work-life balance issues in a thought-provoking and life-enhancing forum. Participants take away a practical toolkit to increase their value to their organization. This program has been in existence since 1999. The date of the last significant update/revision (defined as >=30% content revision) is 10/01/2004.

Participant profile: The primary audience includes Senior VPs, C-level executives and Directors, VPs. The secondary audience includes Mid-level managers and High potential leaders.

The most common industries represented by clients purchasing this offering:
- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities

Public Program: A five-day public program is available.

Prerequisites: Applicants must meet selection criteria; attendees are mid- to senior-level managers.

This program is broken down into the following components:
- Trainer/Consultant Presentation 35%
- Discussion 30%
- Group Activities/Role Plays 15%
- Case Studies 10%

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 45; 90% of these participants reside in the U.S.

Top 3 competitive offerings by program name and vendor:
1. Strategic Leadership for Women, Simmons
2. Women's Leadership Program, Center for Creative Leadership
3. Women Leading Change, Institute for Women's Leadership

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: None
The University of Chicago Graduate School of Business

Executive Education

450 North Cityfront Plaza Drive
Chicago, IL
312-464-8732
http://www.chicagoexec.net

Sales contact:
Patricia La Malfa
312-423-8036

FINANCIAL PROFILE
Ownership/Funding: Privately held; Not-for-profit
Annual fiscal revenue: 2 Years Ago: $10-19 million; Last Fiscal Year: $10-19 million
Annual fiscal revenue from leadership offerings: (excluding stand-alone coaching): 2 Years Ago: $0-9 million; Last Fiscal Year: $0-9 million
Percentage of revenue from leadership offerings delivered outside the U.S.: 0-5%
Profitability based on last fiscal year: GAAP profitable

EMPLOYEE PROFILE
Total number of employees worldwide: 17
Total number of employees delivering leadership training solutions:
Based in U.S. – 2; Internationally – 0
Minimum qualifications for trainers/consultants (whether employees or contractors) who deliver leadership training solutions:
University of Chicago Faculty; consultants with applicable industry experience and credentials
Total number of developers of leadership training solutions: 5

ORGANIZATION TENURE
Years in business and years as a leadership training vendor: 5 - 9

CLIENT PROFILE
Top client companies:
- RSM McGladrey Inc.
- Whirlpool Corporation
- First Midwest Bank
- MetLife

COMPANY PROFILE
Customer Service infrastructure/philosophy: The "Chicago Approach to Business Education" combines the very best in conceptual knowledge and academic theory with practical real-world application. The Chicago GSB, consistently recognized as one of the world's top business schools, is dedicated to the discovery of new business knowledge and bringing it to the business community. They respect the individual and recognize they come here with skills in hand and plans in mind. Here they will learn the business practices and the underlying theory that make them work. They will have access to the newest business concepts before they hit the marketplace, preparing them to identify and capitalize on opportunities first. They will learn from the leading thinkers in business, who respect their unique contributions and demand their best. At Chicago GSB, world-changing ideas are born, tested, refined, and taught. They create and teach in an intense, exhilarating climate of discussion and debate where ideas compete and people collaborate. In this environment of intellectual stimulation and growth, the customer benefits from both the great teaching and the great research that thrives at the GSB. Chicago GSB offers an unparalleled level of high impact teaching that imparts new knowledge to executives. On the administrative end, they strive to provide the best support possible to ensure consistently flawless program delivery.
The Chicago GSB Council is comprised of business leaders. Meeting twice a year, they advise the dean on current business issues; however, they do not determine policy and serve in an advisory capacity only.

**Open enrollment programs:** The customer is key. Client/participant feedback is used to ensure the quality of the program. Executive Education programs are evaluated after each session. Adjustments are made as deemed appropriate. If a program session does not meet or exceed Chicago's quality standards, it will be discontinued or removed from their offering until it can be reworked. Evaluations also rate the administration, as Chicago takes pride in making sure that programs run smoothly. The Transforming Knowledge into Action (TKA) is a powerful web-based tool designed to assist and reinforce ongoing behavior change beyond the class itself. Participants formulate their individual learning objectives prior to attending the program and share them with the faculty. During the program and immediately afterwards, they specify action items to be implemented based on new learning. After the program, TKA prompts participants by email to review their goals and record their progress on their action items. TKA also encourages recording further insights participants have gained outside the classroom during their process of implementing their learning. TKA maximizes the learning impact of their time in the program. The system is set up to be a self-guided review of goals and action items and is a great way to keep on track with progress. TKA also allows company leaders to review and analyze the learning objectives being laid out by the executives in the program and can track progress in meeting those objectives.

**Chicago's investment in R&D as a percentage of their leadership sales revenue:** 0-5%

**The organization's leadership development philosophy:** The Chicago GSB designs and develops leadership programs that equip executives and managers with the knowledge and tools needed to effectively manage their work and relationships in order to be more productive in their organizations. Chicago GSB believes in developing individual strengths to engage and energize leadership efforts. The leadership courses draw on the latest psychological research and managerial studies on process of thinking, dynamics of groups, teams and organizations, corporate culture, and leadership practices. Participants are presented frameworks, tools, and strategies that will drive results in their own business challenges. Timely business cases and articles assigned to be read and prepared; theories and concepts presented and reinforced; strategic frameworks and action tools developed; and in-class team work and exercises for applying the concepts and tools are a vital part of the pedagogy for developing leadership programs. Chicago faculty offers a blend of academic excellence, rigorous scholarship, real world relevance and practical application to provide executives with unparalleled opportunities to deepen their understanding of senior business management and leadership issues. The leadership programs are rigorous and focus on fewer topics, but delve deeper which helps participants understand how to use the information and transfer its application to business challenges. Faculty also leverage the experience participants bring to class to create a rich, interactive learning environment that encourages learning from each other as much as learning from the professor in a risk-free environment.

**Three aspects of a leadership program design that are most important to its success and effectiveness are:**

1.) **Intensity** - They develop programs to push executive participants so they feel they are truly maximizing their time invested in the programs. Chicago GSB uses a discipline-based approach and focuses on teaching executives "how to think, not what to think."
The goal of this "Chicago Approach" is to produce leaders with a superior ability to analyze problems, generate insights, and implement creative solutions. The faculty incorporates research-based, cutting-edge expertise into their leadership programs. They mix solid research with action learning to create high-impact programs that are intense, rigorous, and well integrated. By using a mix of media and teaching style, they deliver engaging programs that are intellectually challenging, interactive, and fast-paced.

2.) Application-orientation – Chicago GSB wants to ensure that their programs are not viewed as "abstract" education, but that they are applied immediately and to the participant's particular current and emerging issues/challenges. Participants leave the seminar with an action plan that details how they will apply the knowledge, skills, and tools that will allow them to better apply existing corporate data to current and future business decisions. For the Enhancing Leadership Performance: The Leader as Teacher course, the Stage Page tool is used for an introspective examination of the various roles of the Leader-Teacher using the metaphor of the theater. The performance aspects of leadership are explored, how one is currently playing his/her role is diagnosed, and the changes needed in one’s leadership role are defined so participants go away with an expanded understanding of their role and how to play it. For the Leading Change and Innovation course, each participant presents a living case concerning a change management/innovation situation for class discussion. Then during the course, the participants develop an action plan for addressing their living case, applying new concepts and methods from the course. For the Strategic Business Leadership: Creating and Delivering Value course, the participants are asked during the week to analyze a strategic business challenge and then to develop an action plan that defines how they will create and deliver value using the frameworks and tools presented in the course. Participants leave the programs with a tool kit for improving their leadership behavior immediately when they return to work. The seminars focus on fewer topics but delve deeper, ultimately helping executives understand how to use the information and transfer its application to other situations. Faculty helps participants put their strategy lessons into practice with specific tools and practical ideas for implementation. Programs feature the web-based learning tool, Transforming Knowledge into Action (TKA), that helps participants prepare for getting the most out of their course, as well as extend their learning beyond the classroom with post-program follow-up.

3.) Interactive - Faculty facilitate an interactive and dynamic environment in the classroom that emphasizes discussion and active participation of executives. The faculty is experienced at stimulating discussion among executives who share their own thoughts, experiences, and opinions in a risk-free environment. The "Chicago Approach" is an open approach, with candor, honesty, and opinions backed by empirical evidence. The faculty is able to leverage a lot of the experience the participants bring to the class so that they learn as much from each other as from the faculty.

LEADERSHIP TRAINING DELIVERY METHODS: Classroom training programs are offered. Classroom training represented 75-100% of leadership revenue in the last fiscal year.

Public, open-enrollment programs include: Enhancing Leadership Performance: The Leader as Teacher; Leading Change and Innovation; Strategic Business Leadership: Creating and Delivering Value. E-Learning programs, stand-alone leadership training products and blended learning leadership programs/curricula are not offered.
STANDARD INFORMATION FOR ALL LEADERSHIP TRAINING PROGRAMS:
Binder of program materials included with every program; The University of Chicago programs are offered in the United States in U.S. English; The open enrolment course can be customized with modifications tailored to client’s objectives and needs; The duration of client-sponsored program depends upon modifications to open enrolment course and client preference.
Pre-assessments: Not available
Delivery options provided: Trainers/consultants deliver the program.
Prerequisites: No
Reinforcement/Follow-up options: The web-based tool, Transforming Knowledge into Action, is designed to assist and reinforce ongoing behavior change beyond the class itself. Participants formulate their individual learning objectives prior to attending the program and share these with the faculty. During the program and immediately afterwards, they specify action items to be implemented based on new learning. After the program, TKA prompts participants by email to review their goals and record their progress on their action items. TKA also encourages recording further insights participants have gained outside the classroom during their process of implementing their learning. TKA maximizes the learning impact of their time in the program.
The standard way to measure program effectiveness and individual behavior change is as follows: TKA, the web-based reinforcement and follow through tool, allows company leaders to review and analyze the learning objectives being laid out by the executives in the program and can track progress in meeting those objectives.

PROGRAM INFORMATION
Enhancing Leadership Performance: The Leader as Teacher
Modality: Classroom training with online reinforcement (Transforming Knowledge into Action)
The single most important skill/competency area addressed in this program is:
• Assessing/Developing Your Personal Leadership Skills/Style
The secondary skills/competency areas addressed in this program are:
• Motivating/Inspiring/Engaging Others
• Coaching Skills
• High Performing Teams
• Communication Skills
• Creativity and Innovation
Course description: The seminar is designed for experienced business professionals who want to explore the teaching and performance aspects of their leadership roles and have fun doing it. Executives and business leaders who are ready to explore their leadership role using some unconventional tools and metaphors will benefit from this program. This course focuses on developing "leader-teachers" using powerful metaphors and tools from education and the theater. This program has been in existence since 1997.
Participant profile: The primary audience includes Senior VPs/C-level executives and Directors/VPs. The secondary audience includes Mid-level managers and Supervisors and/or front-line managers.
The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Process & Manufacturing
- Professional Services
- Transportation

Public Program: A five-day public program is available. Prerequisites: None

This program is broken down into the following components:
- Trainer/Consultant Presentation 35%
- Discussion 25%
- Group Activities/Role Plays 20%
- Simulation 20%

Pre-work/Post-work: Electronic pre-work consists of two writing assignments: 1. Write about some common characteristics seen in roles of a leader and teacher; give two examples from own personal experience that illustrate common characteristics; and 2. Write a brief story about a Leader/Teacher who by his or her actions expanded your creativity in some activity in which you were engaged. Write a second brief story about another Leader/Teacher who by his or her own actions shrunk your creativity on some dimension. The web-based tool, Transforming Knowledge into Action (TKA), asks participants to formulate their individual learning objectives prior to attending the program and to share these with the faculty. There is no post-work involved.

Reinforcement/Follow-up options: Section at end of Program Binder: "Taking Back some Tools and Ideas for Work and Home" which consists of a calendar of suggestions for 33 weeks, Stage Page activity forms, further readings, and additional references. The web-based tool, Transforming Knowledge into Action, asks the participants during and immediately after the program to specify action items to be implemented based on new learning.

The total number of participants in the public, open enrollment version of this program in the last fiscal year: 46; 98% reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available.

Pre-assessments: Not available; Prerequisites: None

### Leading Change and Innovation

**Modality:** Classroom training with online reinforcement (Transforming Knowledge into Action)

**The single most important skill/competency area addressed in this program is:**
- Leading/Sponsoring Change Efforts.

**The secondary skills/competency areas addressed in this program are:**
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Creativity and Innovation

**Course description:** This course provides the knowledge and methods for managing, designing, and leading change in an organization. Strategies are presented for setting and maintaining the course for change, overcoming resistance, maximizing learning and innovative thinking, and anticipating and coping with the repercussions of change. This program has been in existence since 2001.

**Participant profile:** The primary audience includes Senior VPs/C-level executives and Directors/VPs. The secondary audience includes Mid-level managers.
The most common industries represented by clients purchasing this offering are:

- Financial Services & Insurance
- Process & Manufacturing
- Retail, Hospitality
- Professional Services

**Public Program:** A five-day public program is available.

**Prerequisites:** No

**The program is broken down into the following components:**

- Trainer/Consultant Presentation 30%
- Discussion 25%
- Group Activities/Role Plays 20%
- Case Studies 25%

**The total number of participants in the public, open enrolment version of this program in the last fiscal year:** 42; 95% reside in the U.S.

**Client-Sponsored Program:** A client-sponsored program is available.

**Pre-assessments:** Not available; **Prerequisites:** None

**Pre-work/Post-work:** Participants receive a bound packet consisting of pre-course readings: chapters from a course book, a case, and three articles. Participants are given explicit instructions for writing a brief description of a change management situation in which they are currently involved or anticipate being involved in the near future. The web-based tool, Transforming Knowledge into Action (TKA), asks participants to formulate their individual learning objectives prior to attending the program and to share them with the faculty. There is no post-work involved.

**Standard materials provided with program:** Binder of program materials; textbooks: Gods of Management, Conceptual Blockbusting, The Corporate Culture Survival Guide, and The Fifth Discipline

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**Strategic Business Leadership: Creating and Delivering Value**

**Modality:** Classroom training with online reinforcement/follow-through tool (Transforming Knowledge into Action)

**The single most important skill/competency area addressed in this program is:**

- High Performing Teams

**The secondary skills/competency areas addressed in this program are:**

- Setting and Achieving Goals
- Time/Project Management
- Motivating/Inspiring/Engaging Others
- Building Positive Relationships with Others
- Appreciating Diversity
- Creativity and Innovation
- Increasing Performance of Others/Performance Management

**Course description:** This course equips executives to effectively manage their work and relationships to be more productive in contemporary and leaner organizations. They will learn to manage cross-functional, cross-organizational relationships, develop social capital, and create and manage organizational strategic partners. Participants will also gain an understanding of how a savvy manager transitions to a leadership role and how to create an environment where creativity is the norm. This program has been in existence for five years. The date of the last significant update/revision (defined as >=30% content revision) is 02/25/2002.
Participant profile: The primary audience includes Directors/VPs, Mid-level managers and High potential leaders. The secondary audience includes Senior VPs/C-level executives.

The most common industries represented by clients purchasing this offering are:
- Financial Services & Insurance
- Process & Manufacturing
- Professional Services
- Transportation

Public Program: A five-day public program is available. Prerequisites: None

This program is broken down into the following components:
- Trainer/Consultant Presentation 30%
- Discussion 20%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 10%
- Case Studies 25%
- Simulation 10%

Pre-work/Post-work: Participants receive an advance reading packet in which they are asked to read a case and several articles. They are to prepare answers to case questions. The web-based tool, Transforming Knowledge into Action (TKA), asks participants to formulate their individual learning objectives prior to attending the program and to share them with the faculty. There is no post-work involved.

The total number of participants in the public, open enrolment version of this program in the last fiscal year: 69; 94% of these participants reside in the U.S.

Client-Sponsored Program: A client-sponsored program is available.

Prerequisites: None
Zenger Folkman Company
610 East Technology Avenue, Building B  
Orem, UT 84097  
801-705-9375  
http://www.zfco.com  
Sales contact:  
Bob Sherwin  
801-705-9481  
bsherwin@zfco.com

FINANCIAL PROFILE
Ownership/Funding: Privately held, for-profit
Mergers/Partnership/Formal Alliance Activity: Zenger Folkman has formal alliances with Skopos Consulting, Results-Based Leadership, Focused Solutions Group, and Lash and Hall Associates.

EMPLOYEE PROFILE
Total number of certified contractors delivering leadership training solutions: US-based: 40; International: 6
Minimum qualifications for trainers/consultants who deliver leadership training: Trainers/consultants must participate in and complete a certification program and be certified by a master trainer. Trainers must deliver programs quarterly to remain certified. Those who are certified to become Zenger Folkman trainers are generally experienced in the delivery of leadership training, in addition to their academic qualifications.

ORGANIZATION TENURE
Years in business: 0 - 4 years; Years as a leadership training vendor: 0 - 4 years

CLIENT PROFILE
Number of client companies who purchased Zenger Folkman’s leadership training solutions last fiscal year: 15
Percentage of these client companies listed in the Fortune 500: 80%
Top 5 client companies:  
1. Boeing  
2. Thomson Corporation  
3. Conoco Phillips  
4. Milgard Manufacturing  
5. Weyerhaeuser
Top 5 competitors:  
1. Center for Creative Leadership  
2. Personnel Decisions International  
3. Development Dimensions International  
4. Duke Corporate Education  
5. Achieve Global

COMPANY PROFILE
Customer Service infrastructure/philosophy: Zenger Folkman is committed to providing stellar customer service. Each client is provided with an experienced project manager who is dedicated to meeting customer needs and delivering extraordinary customer service. Zenger Folkman also provides ongoing technical support for its 360-degree web site assessment. Project managers and technical support are always available to customers by phone and email during regular business hours.

Zenger Folkman sponsors periodic (2-3 times per year) client forums in conjunction with their public events. At these forums, clients present how they have implemented the leadership training solutions in their organizations and what impact it has had on their organization. There are opportunities for discussion and feedback among clients.

Zenger Folkman works with clients to gather data and evaluate the impact of the training in their workplaces. In 2002 a division of a large manufacturing organization provided each of their managers with an assessment of their leadership effectiveness and put them through Zenger Folkman’s Extraordinary Leader Training program. Employee satisfaction/commitment was also measured for each manager’s work group. In 2003, a...
follow-up measure assessed the change in employee satisfaction/commitment. The follow-up measure showed that employee satisfaction/commitment significantly improved for managers at all levels of leadership effectiveness. Leaders with low scores of leadership effectiveness were encouraged to identify and overcome their fatal flaws. Managers who did not have fatal flaws were encouraged to identify a strength that they wanted to build. Using Zenger Folkman’s Competency Companion Development Guide, they created a non-linear development plan to build their strength. Leaders at every percentile improved in leadership effectiveness. There was also a significant overall improvement in employee satisfaction/commitment for this 11,000-person organization.

Zenger Folkman’s leadership development philosophy:

1. Leadership development must cease relying on old theories and practitioners’ beliefs, and move to empirical research to drive the practice.
2. Top quartile leaders have a dramatically positive impact on the performance of an organization. Therefore, every leader should be encouraged to behave like those extraordinary leaders.
3. People learn by being highly engaged, not by listening to lectures. Stories and metaphors help people learn and remember.
4. Leadership development should improve the way leaders perform on the job or it has little value. Leadership is about producing results.
5. The best leadership development helps leaders identify and magnify strengths versus always focusing on their weaknesses.
6. The task of effective development is to create situations and procedures that enable the leader to obtain constructive feedback that both motivates and enables them to behave differently.
7. A powerful tool to develop leaders is a personal development plan to which they are held accountable.
8. We need to put the same emphasis on follow-up and implementation of learning that we have on developing programs and courses.

The 3 aspects of leadership program that are most important to its success and effectiveness and how these aspects are included:

1. The end result of any development effort should be a personal development plan, created by the leaders themselves, to which they are committed. Each of the offerings leads the participant to leave with a clear, specific plan of action. Every exercise or activity is orchestrated to lead to that end result. These personal development plans must be concrete, actionable and specific.
2. The focus should normally be on developing one strength, or in rare cases, overcoming one serious flaw. Zenger stresses the importance of choosing one thing to work on. Their research shows that if leaders will make changes in any one arena, this positively impacts the people who report to them. Peers notice the change. Positive change feeds on itself. If just one positive change occurs, this far surpasses the results from most programs people have attended. They encourage this change to be in their “leadership sweet spot” that is defined as the intersection of their competencies, their passion, and what the organization needs to have done.
3. The biggest challenge is to get learning and development to stick, and that means much greater emphasis on motivating people to follow-through with what they have committed to do. Zenger Folkman offers each participant a software program that enables him or her to track their progress in implementing their commitments. This tool clearly signals that the organization is holding them...
accountable to do something in the aftermath of any learning and development activity. It has them both report what they have done, and it also requires them to state their plans for the coming period of time. Research shows that effective implementation skyrockets when such a process is followed.

LEADERSHIP TRAINING DELIVERY METHODS: One public open enrollment classroom program; Three client-sponsored programs. Five distinct custom-designed programs (conducted last year). An online reinforcement, follow-through tool (ActionPlan Mapper™) is available. Blended learning leadership programs are not offered.

People Skills Workshop

Modality: Classroom training (with optional online reinforcement)

The single most important skill/competency area addressed in this program is:
  • Building positive relationships with others.

The secondary skills/competency areas addressed in this program are:
  • Motivating/Inspiring/Engaging Others
  • Communication Skills
  • Increasing Performance of Others/Performance Management
  • Building Partnerships and Alliances

Course description: The objective of this workshop is to provide you with insights and techniques for building skills to improve your interpersonal effectiveness. This program has been in existence since October 2004.

Participant profile: The primary audience includes Supervisors and/or front-line managers.

Most common industries represented by clients purchasing this offering:
  • Financial Services & Insurance
  • Technology & Communications
  • Healthcare
  • Process & Manufacturing
  • Retail, Hospitality
  • Professional Services
  • Government
  • Utilities

Public & Client-Sponsored Programs: A public program is not available. A 1-day client-sponsored program is available.

Customization: Zenger Folkman has extensive experience customizing programs to clients’ specific needs. New topics can be added and different experiential activities can be introduced to address client needs.

Pre-assessments: An assessment of interpersonal skills is required (cost is included in participant fees for the workshop).

Delivery options provided: Trainers/consultants can deliver the program. Co-facilitation with client trainers is available, as are train-the-trainer programs and program licensing.

The program design includes the following components:
  • Trainer/Consultant Presentation 30%
  • Discussion 20%
  • Exercises/Quizzes 10%
  • Group Activities/Role Plays 35%
  • Case Studies 5%

Pre-work/Post-work: Participants are required to complete an assessment of interpersonal skills, and there is some optional pre-reading. Following the workshop,
participants are strongly urged to utilize some vehicle that serves to remind and motivate them regarding the commitments they made in the program, such as Action Plan Mapper™ (online reinforcement/follow-through tool), or a peer coach.

**Standard materials provided with program:** Assessment tools are part of the materials provided. Participants also receive a workbook that includes a special "Companion Development Guide" focused on interpersonal skills. Zenger Folkman’s research has discovered the presence of companion behaviors to each of the interpersonal competencies. These companion behaviors are statistically correlated with the competency of people skills, and provide cross-training opportunities for development.

**Optional materials available:** *The Extraordinary Leader* book, by Jack Zenger and Joe Folkman

Zenger Folkman highly recommends clients measure the effectiveness of the program over time using (at extra cost): Follow-up Interpersonal Assessments, and Action Plan Mapper (online reinforcement/follow-through tool).

Reinforcement/Follow-up options: **Action Plan Mapper™ (online reinforcement / follow-through tool) and/or a peer coach.**

**Languages/countries in which this program is offered:** English/U.S. and U.K.

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**The Extraordinary Leader Workshop**

*Modality:* Classroom with (optional) online reinforcement/follow-through tool

**The single most important skill/competency area addressed in this program is:**


**The secondary skills/competency areas addressed in this program are:**

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others Communication Skills
- Building Positive Relationships with Others
- Leading/Sponsoring Change Efforts
- Creativity and Innovation
- Increasing Performance of Others/Performance Management
- Building Partnerships and Alliances
- Thinking Globally

**Course description:** The objective of The Extraordinary Leader Workshop is to provide you with the insights and tools you need to become and remain an extraordinary leader within your organization. This program has been in existence since September 2002. The date of last significant update/revision (defined as >=30% content revision) is 04/20/2004.

**Participant profile:** The primary audience includes Mid-level managers, Supervisors and/or front-line managers and High potential leaders. The secondary audience includes Senior VPs/C-level executives and Directors/VPs.

**Most common industries represented by clients purchasing this offering:**

- Financial Services & Insurance
- Technology & Communications
- Healthcare
- Process & Manufacturing
- Retail, Hospitality
- Professional Services
- Government
- Utilities
A 1 day public program is available. This program is broken down into the following components:

- Trainer/Consultant Presentation 35%
- Discussion 20%
- Exercises/Quizzes 5%
- Group Activities/Role Plays 35%
- Case Studies 5%

**Pre-work-Post-work:** Before the program participants complete the Extraordinary Leader 360 Assessment. Post-work includes development discussion, developmental coaching, and Action Plan Mapper, the online reinforcement/follow-through tool.

**Standard materials provided with the program:** The Participant Manual and Competency Companion Development Guide, Online 360-degree Extraordinary Leader Assessment, and 360-degree Feedback Report. Optional material available is *The Extraordinary Leader* Book.

**Reinforcement/Follow-up options:** Action Plan Mapper™. Program evaluations are completed at the end of each program. Zenger Folkman highly recommends these additional measurement options (at additional cost): Post-assessments and Action Plan Mapper™ can evaluate program effectiveness as it relates to individual behavior change over time.

**Languages/countries in which this program is offered:** The program is offered in English in the United States and United Kingdom.

**Public Program:** Total number of participants in the public, open enrollment version of this program last fiscal year: 60; 95% of these participants reside in the U.S.

**Top 3 competitive offerings by program name and vendor:**
1. Interaction Management by DDI
2. Achieving Results through Genuine Leadership by Achieve Global
3. Benchmark by Center for Creative Leadership

**Client Sponsored Program:** A client-sponsored program is available. The Companion Guide is based on the client's model. Zenger Folkman trainers/consultants can deliver the program; co-facilitation with client trainers is also an option and Train-the-trainer programs and program licensing are also available.

**Countries in which this client-sponsored program is currently offered:** United States, United Kingdom, Switzerland, Puerto Rico, and Norway

Total number of participants in the client-sponsored version of this program last fiscal year: 4,000; 90% of these participants reside in the U.S.

**The Extraordinary Performer Workshop**

**Modality:** Classroom training (with optional online reinforcement)

**The single most important skills/competency areas addressed in this program are:**

- Assessing/Developing Your Leadership Skills/Style
- (Personal Contribution and Development)

**The secondary skills/competency areas addressed in this program:**

- Problem Analysis/Problem Solving
- Strategic Thinking/Decision Making
- Setting and Achieving Goals
- Motivating/Inspiring/Engaging Others
- Communication Skills
• Building Positive Relationships with Others
• Leading/Sponsoring Change Efforts
• Creativity and Innovation
• Building Partnerships and Alliances
• Thinking Globally

Course description: The objective of this workshop is to provide you with a process for taking charge of your future, by focusing on your contribution and development. This program has been in existence since March 2004.

Participant profile: The primary audience includes Supervisors and/or front-line managers as well as individual contributors.

Most common industries represented by clients purchasing this offering:
• Process & Manufacturing
• Technology & Communications
• Government
• Oil & Gas
• Biotechnology

Public & Client-Sponsored Program: A public program is not available. A 1-day client-sponsored program is available. Zenger Folkman has extensive experience in customizing programs to address client specific needs. New topics and different experiential activities can be introduced.

Pre-assessments: 360-degree Feedback Assessment.

Delivery options provided: Zenger Folkman trainers/consultants can deliver the program. Other options include co-facilitation with client trainers as well as Train-the-trainer programs and program licensing.

Prerequisites: Extraordinary Performer Assessment.

Pre-work/Post-work: Following the workshop, participants are strongly urged to utilize some vehicle that serves to remind and motivate them regarding the commitments they made in the program, such as Action Plan Mapper™ (online reinforcement/follow-through tool at additional cost), or a peer coach.

The program design includes the following components:
• Trainer/Consultant Presentation 35%
• Discussion 20%
• Exercises/Quizzes 5%
• Group Activities/Role Plays 35%
• Case Studies 5%


Optional materials available: The Extraordinary Leader book, by Zenger and Folkman

Reinforcement/Follow-up options: ActionPlan Mapper™. Zenger Folkman highly recommends clients measure the effectiveness of the program over time using (at extra cost): Organizational Assessments, Follow-up 360-degree Feedback Assessments, and Action Plan Mapper™ (online reinforcement/follow-through tool).

Languages/countries in which this program is offered: The program is offered in English in the United States and United Kingdom.

Total number of participants in the client-sponsored version of this program last fiscal year: 100; 80% of these participants reside in the U.S.
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| Sr. VPs/C-level executives, Directors/VPs |  | Learning Technologies, Inc. | Assessing Your Leadership Skills | Classroom training | Assessing/Developing Your Personal Leadership Skills/Style  
  — Problem Analysis/Solving  
  — Strategic Thinking/Decision Making  
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# Section IV – Competency Tables

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| High potential leaders, Mid-level managers, Front-line managers |                      | Ninth House                      | Situational Leadership II | Blended learning | Assessing/Developing Your Personal Leadership Skills/Style  
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| High potential leaders, Mid-level managers, Front-line managers |                      | Ninth House                      | Self-Management        | Blended learning | Assessing/Developing Your Personal Leadership Skills/Style  
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| Mid-level managers, Front-line managers |                     | Ninth House        | Capturing Brand You | Blended learning  | Assessing/Developing Your Personal Leadership Skills/Style  
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| High potential leaders, Mid-level managers, Front-line managers | VPs, C-level executives, Directors/VPS | Zenger Folkman      | The Extraordinary Leader Workshop | Classroom training | Assessing/Developing Your Personal Leadership Skills/Style  
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| All management levels     |                    | AMA         | Leading Virtual and Remote Teams      | Classroom training | Assessing/Developing Your Personal Leadership Skills/Style  
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| All management levels     |                    | DDI         | Achieving Your Leadership Potential   | Classroom training | Assessing/Developing Your Personal Leadership Skills/Style  
|                           |                    |             |                                       |                  |   - Continuous Learning  
|                           |                    |             |                                       |                  |   - Initiating Action |
| All management levels     |                    | FranklinCovey | The 7 Habits of Highly Effective People | Classroom training, e-Learning, Training product | Assessing/Developing Your Personal Leadership Skills/Style  
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| All management levels |                | FranklinCovey | Principle-Centered Leadership | Classroom training | **Assessing/Developing Your Personal Leadership Skills/Style**  
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| IT & TECHNICAL PROFESSIONALS  
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| Front-line managers, Individual contributors |                     | Zenger Folkman   | The Extraordinary Performer Workshop | Classroom training | Assessing/Developing Your Personal Leadership Skills/Style  
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| High potential leaders                | Mid-level managers, All other management levels combined     | Gordon Training International      | Leader Effectiveness Training (L.E.T.) | Classroom training | Communication Skills  
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| CONFLICT RESOLUTION | High potential leaders, Mid-level managers, Front-line managers | Ninth House  
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| CONFLICT RESOLUTION | High potential leaders, Front-line managers | AchieveGlobal | Working Through Emotions and Conflict | Blended learning | Communication Skills (Conflict Resolution)  
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| NEGOTIATION | Directors/VPs, High potential leaders, All other management levels combined | Berkeley Center for Executive Development | Conflict and Negotiations  
  ** shown also in conflict resolution section ** | Classroom training | Communication Skills (Negotiation)  
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  — Building Positive Relationships | 85 |
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</table>
| Directors/VPs, High potential leaders. Mid-level managers, Front-line managers | | Ken Blanchard | Building High Performing Teams | Classroom training | Increasing the Performance of Others/Performance Management  
HIGH PERFORMING TEAMS  
- Problem Analysis/Solving  
- Strategic Thinking/Decision Making  
- Setting/Achieving Goals  
- Time/Project Management  
- Motivating/Inspiring Others  
- Communication Skills  
- Conflict Resolution Skills  
- Building Positive Relationships  
- Leading/Sponsoring Change  
- Appreciating Diversity  
- Creativity And Innovation |

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| High potential leaders | Directors/VPs, Mid-level managers, Front-line managers | Berkeley Center for Executive Development | Team Building | Classroom training | Increasing the Performance of Others/Performance Management  
HIGH PERFORMING TEAMS  
- Assessing/Developing Your Leadership Skills/Style  
- Motivating/Inspiring Others  
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- Conflict Resolution Skills  
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- Building Positive Relationships |
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<td>Ninth House Content Provider: Jon Katzenbach</td>
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- Problem Analysis/Solving
- Strategic Thinking/Decision Making
- Communication Skills
- Creativity And Innovation
- Performance Management

**Virtual Teams**
- Time/Project Management
- Communication Skills
- Setting/Achieving Goals
- Leading/Sponsoring Change
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<td>– Business Acumen – Thinking Globally</td>
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<td>Sr. VPs/C-level executives</td>
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### Primary Competency: Leading/Sponsoring Change

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<td>Managing Individual and Organizational Change</td>
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<td>Motivating/Inspiring/Engaging Others — Assessing/Developing Your Personal Leadership Skills/Style — Strategic Thinking/Decision Making — Coaching Skills — High Performing Teams — Leading/Sponsoring Change — Talent Management — Performance Management</td>
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<td>– Thinking Globally</td>
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### Primary Competency: Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning

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- High Performing Teams
- Leading/Sponsoring Change
- Talent Management
- Performance Management
- Customer Centricity
- Business Strategy
- Setting/Achieving Goals
- Motivating/Inspiring Others
- High Performing Teams
- Communication Skills
- Leading/Sponsoring Change
- Creativity and Innovation
- Dealing with Ambiguity
- Performance Management
- Building Partnerships/Alliances
- Business Acumen
- Thinking Globally
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| Sr. VPs/C-level executives| Directors/VPs                       | Center for Creative Leadership | Developing the Strategic Leader | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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  - Building Partnerships/Alliances  
  - Strengthen Skills of Thinking, Acting and Influencing | 100 |
| Sr. VPs/C-level executives| Directors/VPs, Mid-level managers, Front-line managers | Learning Technologies, Inc. (LTI) | Strategic Planning | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Sr. VPs/C-level executives Directors/VPs | UNC | Senior Executive Institute | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Sr. VP/C-level executives | Directors/VPs, Mid-level managers | Thunderbird | Globalization: Merging Strategy with Action | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Sr. VPs/C-level executives, Directors/VPs, High potential leaders | | Thunderbird | Global Leadership Program | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Sr. VPs/C-level executives, Directors/VPs, Mid-level managers | | Thunderbird | Global Leadership Certificate Program | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| (Sample of custom-designed solution) Directors/VPs |                    | Duke Corporate Education | Developing a Competitive Mindset  
  *Each Solution Custom-Designed* | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Directors/VPs    |                    | AMA                  | Strategic Planning Tools: Analytical Applications and Concepts to Enhance Your Plan  
  -- Thinking Globally  
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  -- Strategy Patterns  
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<td>Sr. VPs/C-level executives, High potential leaders</td>
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<td>Directors/VPs, High potential leaders</td>
<td>Sr. VPs/C-level executives, Mid-level managers, Front-line managers</td>
<td>Gallup</td>
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| Directors/VPs, High potential leaders, Mid-level managers |                    | LTI         | Walk the Talk | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| High potential leaders, Mid-level managers | Kenan-Flagler Business School (UNC) | Executive Development Institute | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| High potential leaders, Mid-level managers | | University of Virginia – Darden School Executive Education | Management Development Program: Driving Vision, Action, and Results | Classroom | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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<td>High potential leaders, Mid-level managers, Front-line managers</td>
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| Mid-level managers | High potential leaders, Front-line managers | University of Virginia – Darden School of Executive Education | Strategic Decision Making | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
|                  |                    |             |                                |                  | — Conflict Resolution  
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| Mid-level managers, Front-line managers | DDI | | Reaching Agreement | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
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| Front-line managers | High potential leaders, Mid-level managers | Dartmouth University – Tuck Executive Education | Gateway to Business Management | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
|                  |                    |             |                                |                  | — Business Acumen | 273  |
| All management levels | DDI | | Rapid Decision Making | Classroom training | Problem Analysis/Solving + Strategic Thinking/Decision Making + Planning  
|                  |                    |             |                                |                  | — Risk Taking | 136  |
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<td>AMA</td>
<td>Developing Leaders at All Levels: Fostering Initiative and Creativity</td>
<td>Classroom training</td>
<td>Talent Management – Motivating/Inspiring Others – Performance Management</td>
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<td>High potential leaders, Mid-level managers</td>
<td>DDI</td>
<td>Retaining Talent: Creating the Environment</td>
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<td>Talent Management – Appreciating Diversity – Building Trust – Leading Through Vision and Values</td>
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<td>Talent Management – Coaching Skills – Gaining Commitment</td>
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| Sr. VPs/C-level executives     | Directors/VPs                    | Tuck        | Global Leadership 2020     | Classroom training | Thinking Globally  
- Assessing/Developing Your Leadership Skills/Style  
- Problem Analysis/Solving  
- Strategic Thinking/Decision Making  
- Motivating/Inspiring Others  
- High Performing Teams  
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- Appreciating Diversity  
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| WOMEN                          | Sr. VPs/C-level executives,     | Dartmouth   | Smith-Tuck Global Leaders  | Classroom training | Thinking Globally  
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| Mid-level managers      | Directors/VPs, High potential leaders        | Thunderbird Executive Education | Emerging Global Leader        | e-Learning    | Thinking Globally  
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| Mid-level managers      | Directors/VPs, High potential leaders        | Thunderbird Executive Education | Emerging Global Leader        | e-Learning    | Thinking Globally  
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| Directors/VPs, Mid-level managers |                                             | Thunderbird Executive Education | Global Project Leadership Program | Classroom training | Time/Project Management  
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**NOTE:** Page numbers and table entries are placeholders for demonstration purposes. In reality, they would be filled with actual data from the document.
ENDNOTES:


7 Zenger, 2004, chapter 7 on Fatal Flaws

8 DDI (Development Dimensions, Inc.) Information on their list of derailers can be found at [http://www.ddiworld.com/pdf/DDI_infographics.pdf](http://www.ddiworld.com/pdf/DDI_infographics.pdf)

9 Information on Hogan Development Survey for assessing derailer behaviors can be obtained by visiting [http://www.hoganassessments.com/HDS.aspx](http://www.hoganassessments.com/HDS.aspx)

10 DDI (Development Dimensions, Inc.) Information on their levels of leadership available at [www.ddi-world.com](http://www.ddi-world.com).


22 Executive Development Associates, p.43.
23 Executive Development Associates, p.15.


30 Executive Development Associates, p.32.

31 Executive Development Associates, p.47.
