CI International
achieve long-term success today

Course Catalog

Learn. Grow. Thrive.

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CI International Course Catalog
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Workshop Catagory Page

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About CI International
Introduction

Catalysts for Exceptional Performance

CI International is the comprehensive source for all of your individual and organizational development needs. We are uniquely positioned to change your government agency or organization for the better, from the inside out. Each aspect of your organization is assessed and enhanced; impacting employee development, organizational effectiveness, strategy and business results, training, and leadership.

We offer consulting, workshops, and coaching solutions designed to fuel exceptional performance throughout any organization. Our work is focused on creating sustainable change in individuals, teams, and entire organizations.

CI was born on the idea that greatness exists in all of us. Helping our clients realize greatness is central to our vision and inherent in our values. Throughout our history we have remained focused on helping our clients:

- Lead more effectively
- Communicate better
- Work more efficiently
- Learn, grow, and thrive personally and professionally

These ideals remain alive and strong today.

Excellence at Every Step

Excellence begins when we immerse ourselves into your organization and listen intently to your needs.

We are distinguished by our people and our approach. We only provide senior-level trainers, coaches, and consultants who are experts in their fields. And unlike pre-packaged solutions, we take the time to thoroughly assess and tailor services to address your needs even with our off-the-shelf products.

Our clients look to us to dig deeper, listen more fully, and provide higher-impact services that deliver lasting results. With every step, no matter how straightforward or challenging, we act in your best interest. Our commitment to excellence is evident at every touch point—from the first phone call to the final handshake.

Values that Run Deep

For more than 20 years our commitment has been to provide solutions that serve the best interests of our clients and lead them to the outcomes they desire. Our values run deep and include the following commitments:

- Visible integrity, consistency, and compassion
- Actions and attitudes that elevate the individual, the team, and the organization
- Service and results that exceed expectations
- Partnerships built on trust, candor, and sound advice
- Passion and proven expertise
- Excellence at every step

What We Do

Far-Reaching Impact

Working with the Federal Government is our specialty and we have been privileged to serve individuals and teams at all levels, reaching far and wide throughout departments, agencies, offices, and organizations. In the private sector we have served organizations and institutions such as Verizon, Sun Microsystems, Texas A&M, and Colorado State University.

Our services include the following:

Consulting

- Team & Organizational Assessments
- Meeting and Conference Facilitation
- Strategic Planning
- Communications Consulting
- Productivity Improvement
- Organizational Effectiveness

Workshops

- Leadership Workshop Series
- Team Building
- Speaking with Courage & Conviction
- Writing with Clarity & Impact
- Change Management
- Customer Service
- Workplace Diversity
- Conflict Resolution
- Performance Management
- Time, Information & Priority Management

Consulting

Improve Performance. Achieve Results.

With us, consulting is an inclusive partnership designed to help you overcome difficult challenges, thrive through change, and discover new ways to achieve more. We consult with our clients to assess organizational effectiveness, create strategic plans for the future, and address transformational change.

Our customized strategic planning services are designed to bring clarity to the steps you need to take and how to measure progress in reaching your organization's vision.

When your needs involve organizational effectiveness, our holistic approach is applied to evaluate systems that are critical to success, including business and human capital planning, performance management, large-scale organizational change, metrics, and employee engagement.

Our communications consulting services will guide you to maintain consistency and clarity in your communications during large-scale change management initiatives.

And when you need real-world solutions and tangible ways to improve productivity within people, processes, or systems, our productivity improvement services will support your success. Add to this our proven approach to meeting facilitation; you'll achieve the outcome you desire and attendees will feel that their time and ideas were valued.

No matter what your consulting needs may be, look to us for the expert guidance, knowledge, and resources that inspire innovation and success.

Tailored to Your Needs

Our consulting services are designed according to your unique circumstances, challenges, and goals. Services include the following:

- Team & Organizational Assessments
- Meeting and Conference Facilitation
- Strategic Planning
- Communications Consulting
- Productivity Improvement
- Organizational Effectiveness

Learn how we can help you maximize your time and resources through our targeted consulting services.

Workshops

Address Challenges. Build Strengths.

There are many ways to develop the potential of leaders and teams in your organization. Our comprehensive workshops address your challenges and build your strengths in an open, safe and supportive environment. Led by our knowledgeable team of experts, each workshop is crafted according to our proven model while addressing your unique culture and circumstances. Every detail, from the duration of each session to the material we cover, is geared toward improving your performance.

Our clients look to us to dig deeper, to take the time to listen fully, find out what issues they face and tailor our services to their needs. Our course descriptions, while a good guide for our off-the-shelf offerings, can be tweaked and combined with materials from other courses that we offer to cover the exact topics that are needed by our customers. In most cases, depending on the level of customization needed, this is done without any additional cost.

Look to us for the expert guidance, knowledge, and support you need to overcome obstacles and instill the type of confidence that leads to success.

CI's workshops are highly interactive, relevant and create a clear bridge to your workplace. Let us show you how we can support your efforts to improve performance and inspire greatness within your organization.

To determine the right training solution for your needs, CI can help with specific, targeted assessments.

Workshops include the following:

- Leadership Workshop Series
- Team Building
- Speaking with Courage & Conviction
- Writing with Clarity & Impact
- Change Management
- Customer Service
- Workplace Diversity
- Conflict Resolution
- Performance Management
- Time, Information & Priority Management

Virtual Training

Instructor-Led Webinars.

Creating a bridge to the workplace requires critical application of concepts to a participants work throughout a training experience. While many vendors offer webinar versions of their courses, they often miss the mark when it comes to virtual engagement. We make sure that the classroom experience makes it into our virtual courses. CI International has a unique toolkit that we employ in the delivery of our web-based learning solutions to ensure that participants are engaged and not just staring at a talking head on their computer screen. We took great care to make sure that our web-based training has the highest impact possible, and offer online versions of the majority of our workshops.

Coaching

Uncover Greatness

At CI International, we help good leaders become great leaders. Through our targeted coaching services, we'll empower you to lead more authentically, work more efficiently, and steer tomorrow's leaders toward success.

To us, Executive Coaching is a proactive process that sharpens your skills and empowers you to achieve formerly inconceivable dreams and aspirations while improving your bottom line. Our approach to executive coaching will help you manage and lead more effectively, communicate more powerfully, and transition through change successfully.

Through our specialized Efficiency & Productivity Coaching, we've turned disorganized workspaces into productive ones and brought power back to overwhelmed leaders.

We share our coaching expertise and wisdom through our Coach Training and inspire leaders to become effective coaches within their own organizations.

Look to us for the expert guidance, knowledge, and support to rise to new challenges, gain the confidence that leads to success and build leadership potential on many levels.

Sharpen Up

Our coaching services are designed according to your unique situation, challenges, and goals. Learn how we can help you sharpen your skills and become a more effective leader:

- Executive Coaching
- Efficiency & Productivity Coaching
- Internal Coach Certification Training

To get the most out of our coaching, CI also offers a series of leadership assessments.

Leadership Programs

CI International
achieve long-term success today

Leadership for New Supervisors
3 Days

Business Need:

Becoming a new supervisor is one of the toughest transitions in the workplace, requiring a set of skills far beyond technical competence. Give your new supervisors the jump start they need with this three-day interactive workshop.

Course Description:

This workshop will provide a set of immediately useful and practical tools to increase both the capability and confidence of new supervisors. Participants begin with an exploration of leadership definitions and characteristics, in order to develop a vision for their own supervisory success. Once a common leadership framework has been established, participants will dive into the “nuts and bolts” of supervision and learn tools and techniques for setting and communicating performance standards and expectations, creating performance measures, giving feedback, conducting appraisals, resolving conflict, and delegating.

Course Objectives:

- Recognize the differences between leadership and management.
- Describe the roles and characteristics of good leaders.
- Understand how the supervisor is currently viewed by their staff, peers, and supervisors.
- Conduct effective employee performance appraisals.
- Understand how to resolve conflict situations that arise in the workplace.
- Create a workplace environment conducive to greater staff commitment.
- Comprehend the realities of change and apply effective strategies for managing change.

Leadership for New Supervisors
3 Days

Course Topics

The Role of a Supervisor
- Leadership perspectives, and leadership versus management
- Characteristics of effective leaders and how to develop them
- Characteristics of effective teams, and the leader's role in building the team
- The changing demographics of today's workplace and the implications for our leadership model
- Leveraging diversity and creating a culture of inclusion

Performance Management
- The performance management cycle
- How to use the SMART model to write effective performance standards
- Using action verbs in your standards
- Criteria for quantitative measures
- How to write effective qualitative (behavior-based) measures
- Activities versus outcomes
- Skillful Discussion model to encourage dialogue about performance and ensure employee participation in the performance management process
- Active listening
- Using a consistent feedback model
- Conducting a performance appraisal meeting
- Connecting productivity and rewards
- Practice activities/role play

Conflict Management
- Defining conflict and identifying the sources of conflict
- Conflict resolution techniques and approaches
- Understanding your own approach to conflict and its impact on others

Delegation
- Delegation as a tool for motivation/empowerment
- Building trust through delegation
- Steps for effective delegation: goal, guidelines, resources, communication, consequences

Wrap-up
- Commitments and action planning

Leadership for New Supervisors
3 Days

Course Schedule

Day	1	2	3
AM	• Defining leadership • Characteristics of effective leadership and effective teams	• Performance management cycle • Performance standards and measures • Skillful discussion model • Active listening	• Types and sources of conflict • Conflict resolution techniques
PM	• The changing workplace • The changing role of leadership • Leveraging diversity	• Feedback model • Conducting appraisals • Dealing with performance problems • Practice activities	• The delegation model • Employee motivational factors • Action planning

Field of Study	Leadership Development Programs
Course Level	Introductory
Credits	
Learning Methods	Presentation, discussion, practice activities
Equipment	Projector and screen
Suggested Prerequisites	None
Recommended Follow-up Courses	• Mid-level Leadership Program

Delivery Formats:

We customize our delivery to meet your specific requirements. This three-day session is also offered in a five-day version which allows for more time for activities and more in-depth classroom learning. This can also be delivered in a hybrid (mix of in-person and online) version. We also recommend that the Thomas Kilmann Instrument (TKI) be administered prior to the session.

Mid-level Leadership Program
10 Days

Business Need:
Leadership is about getting results. However, results are only achieved with and through the commitment of the people we lead, and that requires self-awareness and a set of skills on the part of the leader.

Course Description:
This leadership development workshop is composed of five 2-day sessions that may be delivered on a schedule that fits your organizational needs. In Session One, participants will examine the process of transitioning to a leadership role and learn about different leadership styles and personality types. In Session Two, we link emotional intelligence to personal and interpersonal effectiveness, and learn techniques for time management and delegation. Session Three focuses on communication skills, giving and receiving feedback, conflict management, and negotiation/persuasion. Session Four examines motivational factors, collaboration, coalition-building, and diversity awareness. In Session Five, we'll focus on decision-making, problem-solving, strategic thinking, and managing change.

Course Objectives:
- Identify and apply leadership characteristics
- Create a motivating workplace environment
- Effectively communicate at all levels of the organization
- Learn and apply your individual leadership style
- Demonstrate resilience through emotional intelligence
- Manage time wisely
- Give and receive effective feedback
- Manage conflict and negotiate agreement
- Build strong coalitions
- Coach subordinates to develop critical thinking skills
- Become culturally intelligent
- Be a more effective decision maker
- Learn and apply effective strategies for managing change.

Course Topics

Session One

Self-awareness and the Leadership Function (Part One)

- Program orientation
- Defining leadership
- Leadership styles and success factors
- Tools and techniques for making the transition to supervisor
- The leader's role in team building
- MBTI: personality differences and preferences
- Understanding your own personality
- The impact of personality on leadership style and effectiveness
- Using personality insights to build a stronger team

Session Two

Self-awareness and the Leadership Function (Part Two)

- Administration of the Bar-On Emotional Quotient Inventory Assessment (EQ-i)
- Components of emotional intelligence
- Using EQ to build resilience
- Understanding your own EQ strengths and opportunities
- EQ as a leadership competency: understanding the intentions, motivations, fears, and desires of others and their impact on performance
- Tools and techniques to improve your EQ as a leader
- Setting goals and objectives
- Techniques for planning and prioritization: become proactive instead of reactive
- Work load analysis
- Time management tools and techniques
- Understanding motivational theory: Herzberg and Maslow
- Connecting delegation with empowerment
- Building trust through delegation
- Steps for effective delegation: goal, guidelines, resources, communication, consequences
- Activity: delegation role play
- The importance of organizational and personal learning
- Defining and creating a learning organization

Session Three

Understanding and Collaborating with Others (Part One)

- The case for active listening
- False listening and how to recognize the signs
- Listening on three levels
- The Ladder of Inference and how our assumptions affect our listening ability

Course Topics (Continued)

Session Three

Understanding and Collaborating with Others (Part One, Cont.)

- Skillful Discussion and the Johari Window: balancing advocacy and inquiry to bring relevant information into the open
- The emotional impact of positive and negative feedback
- Tips for giving effective constructive feedback
- A six-step process for giving feedback
- The performance problem solving model
- The Thomas Kilmann conflict resolution model for understanding different approaches to conflict
- Understanding your TKI results (if assessment is used)
- How your personal conflict style helps or hinders you as a supervisor
- Communication skills to find a common understanding and purpose in conflict situations
- Principles of “win-win” negotiation
- Tools and techniques for finding common ground and negotiating agreement
- Digging to find the interest’s underlying positions
- Influencing upward to gain support

Session Four

Understanding and Collaborating with Others (Part Two)

- Understanding what coalitions are and the strategic value they can provide
- Identifying your strategic partners
- Techniques to build and maintain coalitions
- Applying a negotiations model to coalitions that serve the interests of all parties
- Interactive activities to practice creating coalitions
- Understanding what makes a leader a good coach
- The Socratic art of using powerful questions to grow independent problem solvers
- Applying a coaching model to your interactions with employees
- The leader’s role in creating a coaching culture
- The leader’s role in creating an environment for self-motivation
- Recognition that works: praise, thanks, opportunity, respect
- Creating personalized recognition approaches that help inspire and motivate

Course Topics (Continued)

Session Four

Understanding and Collaborating with Others (Part Two, Cont.)

- The business case for diversity: examining the trends that impact your agency, including demographic, technological, legislative, competitive, and trends related to organizational change and stakeholder expectations
- Diversity and inclusion terminology and definitions
- Sources of socialization
- The components of cultural intelligence: drive, knowledge, strategy, action
- Understanding unconscious bias: the tolerance scale
- Understanding generational difference
- Strategies for leading a diverse workforce

Session Five

Key Business Acumen

- The ethnics of “right vs. right”
- Understanding the application of personal values to decision making
- Dilemma analysis: four “dilemma paradigms” which will help you to see your choices more clearly
- Three resolution principles to use in reaching a decision on a right vs right issue
- Applying various decision making models to different situations
- Developing problem solving skills for yourself and your employees
- Knowledge management as a strategic advantage
- Understanding knowledge strategies
- Principles of strategic thinking
- Change management models and how to apply them in the workplace Techniques to build support for change

Course Schedule

Session 1	Day 1	Day 2
AM	• Orientation • Defining leadership	• Understanding personality (MBTI)
PM	• Making the transition • Team building	• MBTI continued • Action steps and closing activities

Session 2	Day 1	Day 2
AM	• Emotional intelligence and personal effectiveness	• Motivational theories and the connection to empowerment • Delegation
PM	• Planning and setting priorities • Time management techniques	• Creating a learning organization • Action steps and closing activities

Session 3	Day 1	Day 2
AM	• Communication models • Giving feedback	• Understanding your TKI results • Principles of win-win negotiation
PM	• The performance problem solving model • The Thomas Kilmann conflict resolution model	• Negotiation skills and techniques • Action steps and closing activities

Session 4	Day 1	Day 2
AM	• Creating and maintaining coalitions	• Using personalized recognition programs to increase motivation
PM	• Coaching skills for supervisors	• Diversity awareness • Action steps and closing activities

Course Schedule

Session 5	Day 1	Day 2
AM	• Understanding and resolving ethical dilemmas	• Strategic thinking • Change management
PM	• Analysis and problem solving	• Change management (continued) • Program wrap-up

Field of Study	Leadership Development Programs
Course Level	Intermediate
Credits	
Learning Methods	Presentation, discussion, practice activities
Equipment	Projector and screen
Suggested Prerequisites	
Recommended Follow-up Courses	• Executive Leadership Program

Delivery Formats:

We customize our delivery to meet your specific requirements. This program is typically delivered in five 2-day sessions, which can be scheduled consecutively or spaced according to your needs. The program can also be delivered in a hybrid (mix of in-person and online) version. We recommend the following assessments be administered prior to individual sessions: a 360 degree assessment, the Myers-Briggs Type Indicator (MBTI), the Thomas-Kilmann Instrument, and the Bar-On Emotional Quotient Inventory Assessment (EQ-i).

Senior Executive Leader Program

10 Days

Business Need:

Today's agency executives are faced with many tough challenges, including the need to make quick decisions, a rapidly and constantly changing environment, a consistent requirement to be "on stage" and deliver a credible message, and the challenge of building coalitions both within the organization and externally. Taking time out to increase self-awareness and sharpen one's leadership skill set is crucial for success.

Course Description:

This leadership development workshop includes an executive coaching component and is composed of five 2-day sessions that may be delivered on a schedule that fits your organizational needs. In Session One, "Ethics, Integrity, and Courageous Decision Making", participants will be introduced to the program, their 360 assessment instruments, and their executive coaches. They will also begin creating leadership development plans, and will explore practical ethics with a focus on making difficult "right vs. right" ethical choices. In Session Two, "Executive Presence", executives will learn to enhance their credibility and convey the agency's message skillfully, confidently, and persuasively through a series of videotaped practice presentations with feedback from a professional coach. Session Three, "Expanding Organizational Impact", will focus on sharpening participants' skill in collaboration. In Session Four, "Investing in Talent", participants will leverage their own experiences with their assigned executive coaches to develop coaching skills of their own. Finally in Session Five, "Strategic Thinking and Accountability", participants will develop a set of tools to facilitate a shift from the tactical, day-to-day, and short-term to the strategic, visionary, anticipatory, and long-term through the use of scenario planning.

Course Topics

Session One

Integrity and Ethical Leadership

- Program orientation and activities to get to know one another
- Introduction to executive coaches and the coaching contract
- Introduction to 360 assessment tool
- Begin creation of leadership development plans
- The ethics of "right vs. right"
- Understanding the application of personal and organizational values to decision making
- Dilemma analysis: four "dilemma paradigms" which will help you to see your choices more clearly
- Three resolution principles to use in reaching a decision on a right vs. right issue

Session Two

Spreading the Message—Effective Oral Communications

- Enhancing credibility and confidence through stronger delivery techniques
- Organizing presentations to accomplish your purpose and maximize impact
- Giving and receiving elevating feedback
- Four videotaped practice presentations per participant, of increasing complexity, with feedback from a professional coach
- Defining and creating a learning organization

Session Three

Conflict Management, Negotiations, and Coalition Building

- Principles of "win-win" negotiation
- Tools and techniques for finding common ground and negotiating agreement
- Digging to find the interests underlying positions
- Understanding what coalitions are and the strategic value they can provide
- Techniques to build and maintain coalitions
- Applying a negotiations model to coalitions that serve the interests of all parties
- Interactive activities to practice creating coalitions

Course Topics (Continued)

Session Four

Developing Others

- Understanding the difference between coaching, mentoring, and counseling
- What makes a leader a good coach
- The Socratic art of using powerful questions to grow independent problem solvers
- Applying a coaching model to your interactions with others
- The leader's role in creating a coaching culture
- Understanding generational difference

Session Five

Key Business Acumen

- The need for a strategic perspective in a rapidly changing environment
- Using scenario planning to develop a set of alternative descriptions of the future which differ from each other in fundamental ways via differences in technology, consumer expectations, or other factors, with the goal of fully understanding the driving forces affecting the future
- Applying protocols regarding organizational politics
- Building politically savvy relationships

Course Schedule

Session 1	Day 1	Day 2
AM	• Program orientation, including 360 assessments and executive coaching assignments	• Understanding "practical ethics" • Personal and organizational values
PM	• Begin creation of leadership development plans	• Dilemma analysis and decision making for "right vs. right" decisions

Session 2	Day 1	Day 2
AM	• Organizing your oral presentation material	• Videotaped presentations with coaching
PM	• Delivery techniques for high impact presentations	• Videotaped presentations with coaching

Session 3	Day 1	Day 2
AM	• Conflict resolution models • Understanding your own conflict style	• Creating and maintaining coalitions
PM	• Negotiation principles, tools, and techniques	• Discussion and activities to practice coalition building

Session 4	Day 1	Day 2
AM	• A coaching model	• Creating a coaching culture
PM	• Techniques for powerful coaching	• Coaching case studies and role play

Course Schedule

Session 5	Day 1	Day 2
AM	• The case for strategic perspective • Scenario planning model	• Organizational politics and the "40 Rules of Positive"
PM	• Scenario planning practice activities	• Leadership development plans • Program wrap-up

Field of Study	Leadership Development Programs
Course Level	Advanced
Credits	
Learning Methods	Presentation, discussion, practice activities
Equipment	Projector and screen
Suggested Prerequisites	Mid-level Leadership Program
Recommended Follow-up Courses	

Delivery Formats:

We customize our delivery to meet your specific requirements. This workshop is typically delivered in five 2-day sessions, which can be scheduled consecutively or spaced according to your needs. This program can also be delivered in a hybrid (mix of in-person and online) version. We recommend that the program include executive coaching assignments and a 360 leadership assessment. Other assessment options include the Myers-Briggs Type Indicator (MBTI), the Thomas-Kilmann Instrument, and the Bar-On Emotional Quotient Inventory Assessment (EQ-i).

Leadership Sessions

CI International
achieve long-term success today

Fundamentals of Leadership

1 Day

Business Need:

In order to be able to lead others we must first be able to lead ourselves; self-leadership, in fact, is the best example any leader can set. In order to lead ourselves we must first develop an understanding of how our mental models and communication skills impact our leadership styles.

Course Description:

This workshop is about reflection and understanding. Through discussion and interactive activities, participants will define effective leadership and explore the impact of assumptions and mental models on dialogue skills. They will also learn techniques for revealing one's own thinking, understanding the thinking of others, and communicating more effectively in conflict situations.

Course Objectives:

- Identify the habits of effective leaders and how to develop those habits
- Learn the characteristics of effective teams, and the leader's role in building and maintaining the environment for success
- Learn and understand mental models

Fundamentals of Leadership

1 Day

Course Topics

Defining Leadership

- Introductions
- What is leadership?
- Group work to identify characteristics of effective leaders
- Habits of leadership: attitude, skill, and knowledge

Characteristics of Effective Teams

- Group work to identify characteristics of great teams

Mental Models

- Core beliefs of an effective leadership model
- Developing active listening skills; listening on three levels
- Practice activity
- The ladder of inference as a tool to understand mental models

Skillful Discussion

- Balancing advocacy and inquiry
- Protocols for improved advocacy; making your thinking process visible
- Protocols for improved inquiry; understanding someone else's thinking process
- Protocols for better dialogue in conflict situations

Effective Delegation

- Steps for effective delegation: goal, guidelines, resources, communication, consequences
- Action steps and closing

Course Schedule

	Topics
AM	• Defining leadership • Characteristics of effective teams
PM	• Mental models • Skillful discussion • Delegation

Fundamentals of Leadership

1 Day

Field of Study	Leadership Development
Course Level	Entry-level and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Leading Without Formal Authority

1 Day

Business Need:

The role of team leader is one of the toughest to fill, and one commonly assigned to top performers who haven't yet been assigned a formal leadership role. Such individuals lead project teams in which team members don't officially report to them. This can be a tough, even intimidating assignment, especially if team members don't hold themselves accountable. Team leaders need tools to employ in such circumstances if they are to be successful in their new roles.

Course Description:

In this interactive workshop participants will examine the role of assumptions and mental models in influencing others. They will also learn and practice using tools such as a team charter, a delegation model, theories of employee motivation, and steps for giving and receiving feedback.

Course Objectives:

- Learn and understand communication models and the impact of mental models
- Gain tools for giving and receiving more effective feedback
- Clarify roles and responsibilities to gain commitment
- Gain tools to delegate effectively
- Influence team members by learning about and appealing to their interests
- Coordinate effectively with senior leaders and team sponsors

Leading Without Formal Authority
1 Day

Course Topics

Common Success Factors
- Identifying challenges to leading without formal authority
- Starting well
- Stages of group development
- Delegation: using a team charter model

Communicating Expectations
- Understanding mental models
- Ladder of inference
- Skillful discussion
- Roles and responsibilities

Working with Team Members
- The Johari Window
- Steps for giving and receiving feedback, with tips for success
- Relationship with team sponsor

Managing Conflict and Negotiating Agreement
- "Getting to Yes"
- Activity: the ultimatum game
- Understanding team member motivation

Course Schedule

	Topics
AM	• Common success factors • Communicating expectations
PM	• Working well with team members • Managing conflict and negotiating agreement

Leading Without Formal Authority

1 Day

Field of Study	Leadership Development
Course Level	Team leaders and lower-level supervisors
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Influencing Upwards

½ Day

Business Need:

Leadership is largely about influence. Leaders must be able to influence those who work for them to accomplish the mission and goals of the organization. Typically the organization provides a nice set of tools to help accomplish this. Leaders also have to be able to influence peers and bosses; the organization provides fewer tools to accomplish this. Yet all leaders are faced on occasion with the need to “tell truth to power” and influence up the chain of command. Some leaders do this well; others less so.

Course Description:

There is both an art and a science to influencing upwards that can be learned. This workshop will provide the necessary skills, knowledge, and ability to both get your ideas heard and do it in a way that serves the organization, your boss, and your own team.

Course Objectives:

- Present ideas positively and persuasively
- Find and use the right “levers” to move ideas forward
- Use positive workplace politics to be more influential

Influencing Upwards
½ Day

Course Topics

What Makes it Hard
- Sharing stories of challenging situations
- Understanding why we hesitate to influence upwards

Communicating Expectations
- Adopt the boss' point of view
- Paint a picture
- Make it come alive
- Pitch in terms of greater good
- Do cost/benefit analysis

Working with Team Members
- Own expertise
- Understanding of boss
- Insight into organizational issues

Managing Conflict and Negotiating Agreement
- In service of the organization
- Act with both courage and understanding of risk

Field of Study	Leadership Development
Course Level	All levels
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:
We recommend a half-day workshop, or a 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Why Good Leaders Fail
1 Day

Business Need:

Leaders can be defined in a moment, or over a period of years. Effective leaders acknowledge that it's preparation that can quietly—or quickly—advance them or result in a career-ending move. Leaders do fail at times, and the study of these situations can provide us with valuable lessons in leadership.

Course Description:

This workshop will explore case studies of leaders and public figures that were faced with defining moments in their leadership legacy and came up short. While most of our day-to-day decisions and situations don't rise to this level of consequence we can learn a great deal by looking at what each leader faced, the options they had, and the paths they took, and then explore alternative paths and outcomes based on today's leadership principles.

Course Objectives:

- Explore contemporary lessons in leadership
- Understand what causes leaders to fail
- Examine the application of contemporary leadership models
- Help build "muscle memory" to better prepare and respond to leadership challenges

Why Good Leaders Fail
1 Day

Course Topics

Common Elements of Leadership Failure
- Sharing stories of leadership failure
- Identify common elements
- Self-assessment: what are your risk factors?

Taking Leadership Strengths Too Far
- Research from Tim Irwin
- Behaviors that derail: authenticity, self-management, humility, courage
- Case studies

Ensuring Authenticity
- Identify values
- Identify expectations
- Formulate leadership philosophy

Ensuring Self-management
- Identify strengths and weaknesses
- Identify impact on others
- The Johari Window

Ensuring Humility
- The Ladder of Inference (identifying your assumptions and managing your stories)

Ensuring Courage
- The Left-hand Column activity (evaluating whether you should speak your mind)
- Left-hand column practice activity

Course Schedule

	Topics
AM	• Common elements of leadership failure • Taking leadership strengths too far
PM	• Ensuring authenticity • Ensuring self-management • Ensuring humility • Ensuring courage

Why Good Leaders Fail
1 Day

Field of Study	Leadership Development
Course Level	Senior level and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Courageous Decision Making

1 Day

Business Need:

Leaders make tough decisions every day. The toughest decisions are those that put deeply held values in conflict. Making the right decision is easy when there's a clear distinction between right and wrong, but often the distinction isn't so obvious. This workshop provides the foundation for courageous decision making. Even more important, it gives leaders a foundation to stand on in tough times. In a world of unremitting change, leaders must display unremitting character, integrity, and courage when faced with their toughest decisions.

Course Description:

Courageous and values-based decision making can create the atmosphere that allows judgments to be made within the context of vision, mission, and agency goals. Put simply, this workshop provides leaders with the ability to make better decisions. Even the most challenging decisions are less gut-wrenching if they flow from common well thought-out values, clear priorities, and strategic agreement. Through case studies, reflection, exercises, and lively discussion participants learn the importance of values-based decision making based on the organization's mission and develop a set of useful tools to put that learning into action. This workshop is presented in partnership with the Institute for Global Ethics.

Course Objectives:

- Expand awareness of why courageous decision making matters to leaders and decision makers
- Learn to analyze and resolve right versus right dilemmas in a courageous, forthright, and thoughtful manner

Courageous Decision Making

1 Day

Course Topics

The Ethics of Right vs. Right

- Two real-life case studies which go to the heart of courageous decision making

Why Ethics Matters

- How changing expectations of leadership, a more transparent society, and the influence of technology are making ethics and ethical decision making increasingly important for leaders

Dilemma Analysis

- Learn to analyze and understand the relevant choices before making decisions.
- Examine and apply four “dilemma paradigms” which help to see choices more clearly

Dilemma Resolution

- Learn the three resolution principles to use in reaching a decision on a right vs. right issue
- Apply the principles to your own dilemmas to reinforce the validity of the model

Course Schedule

	Topics
AM	• The ethics of right vs. right • Case studies • Group discussion and analysis of why ethics is especially important to leadership and decision making in the 21st century • Presentation of four dilemma paradigms • Participants share their own stories of courageous decision making
PM	• Presentation of three resolution principles • Participants apply resolution principles to their own stories • Conclude with action planning and presentation of overarching model of courageous decision making

Courageous Decision Making

1 Day

Field of Study	Leadership Development
Course Level	Senior level and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Tactical to Strategic Thinking
1 Day

Business Need:
In these turbulent budgetary times the need for a strategic perspective grows increasingly important. While these can be seen as difficult or dangerous times for government agencies, the future is also full of opportunities. Strategic thinkers are the people who will give these opportunities life and capitalize on them. In today's rapidly changing environment, leaders need a broad perspective, vision, and an intrinsic awareness of the trends and developments shaping their work. The need for a strategic approach to work is no longer limited to senior leaders. Operational leaders, typically limited to a tactical focus, will need to develop a more strategic outlook in order to help their teams adapt to this rapidly changing world.

Course Description:
This workshop will provide participants with a set of tools that will facilitate a shift from the tactical to the strategic. The emphasis will be on increasing awareness of the importance of strategic thinking and providing the necessary background and skills to effectively put that thinking to work. Participants will also learn decision making tools, tips, and traps that they can immediately incorporate into their daily work.

Course Objectives:
- Learn the difference between tactical and strategic thinking approaches
- Take a systems thinking approach to decision making
- Identify and interpret environmental factors that influence strategic thinking
- Forecast the ripple effects of strategic decisions
- Identify detractors that commonly prevent strategic thinking

Tactical to Strategic Thinking

1 Day

Course Topics

Practical Strategic Thinking

- Strategic vs. tactical thinking
- Urgent/important matrix for practical strategic thinking

PEST: Analysis of Issues Impacting Agency

- Political, economic, social, technological
- Scenario planning with practice activities

Balancing Competing Roles of Leadership

- Vision setter
- Environment maker
- Analyzer
- Task master

Single vs. Double Loop Learning

- Single loop continuous learning: incremental change
- Double loop continuous learning: transformational change
- The Five Whys

Course Schedule

	Topics
AM	• Practical strategic thinking • PEST analysis
PM	• Competing roles of leadership • Single vs. double loop learning • Action planning

Tactical to Strategic Thinking

1 Day

Field of Study	Leadership Development
Course Level	Senior level and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Mentoring Skills
1 Day

Business Need:

A leader has many responsibilities, and the list seems to be growing. Nonetheless, there are several items which appear on practically every list of leadership responsibilities: the ability to create an environment for success, because above all the leader must show the ability to get results; and the responsibility for developing others. Our legacy as leaders will be determined less by what we've accomplished than by what we leave behind.

Course Description:

Participants in this workshop will examine the skill sets of effective mentors and mentees, and develop tools to manage mentoring relationships. These tools include a mentoring contract, active listening, giving feedback, and preparing for meetings.

Course Objectives:

- Learn the characteristics of effective mentors and mentees
- Gain tools for effective mentoring
- Learn how to build a strong mentoring relationship

Mentoring Skills
1 Day

Course Topics

Characteristics of Effective Mentors and Mentees
- Definition of mentorship
- Expectations of mentors and mentees
- The mentor roadmap: six steps for an effective relationship
- The mentor skill set

Listening and Building Rapport
- Techniques to build rapport in the first meeting
- False listening
- Active listening on three levels
- Practice activity
- Using curious questions

The Mentor Contract and Early Meetings
- Setting ground rules
- Practice activity: the first meeting
- Determining goals
- Practice activity: the second meeting

Giving Feedback and Later Meetings
- Johari Window
- Tips for successfully giving and receiving feedback
- Six steps for providing effective feedback
- Meeting preparation
- Closeout meetings
- Common pitfalls

Course Schedule

	Topics
AM	• Characteristics of effective mentors and mentees • Listening and building rapport
PM	• The mentor contract and earlier meetings • Giving feedback and later meetings

Mentoring Skills

1 Day

Field of Study	Leadership
Course Level	
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Managing Conflict and Negotiating Agreement

1 Day

Business Need:

It's impossible to be truly effective in the workplace without the assistance and cooperation of others. Such interdependence, however, can produce conflict. Resolving conflict in a way that helps people find common ground and mutual understanding is a critical leadership skill. Finding a resolution that satisfies conflicting priorities can stimulate new approaches to old problems, thus innovation is often a by-product of well-managed conflict. Unfortunately, many people are afraid of conflict so conflict goes underground, sabotaging projects, and destroying team spirit.

Course Description:

This workshop provides tools and techniques to find common ground while uncovering perspectives on how each party sees the issues, and how to reach an equitable agreement on what should be done, by whom, and when. Participants in this workshop will learn how to address conflict and negotiate agreement without giving in. They will also learn to influence upwards in support of projects and organizational goals.

Course Objectives:

- Identify your personal conflict management style and how it helps and hinders resolution of conflict
- Learn to manage conflict – and use it positively
- Increase your confidence in dealing with conflict
- Turn conflict situations into opportunities to communicate openly and effectively
- Become an effective and principled negotiator
- Gain tools for finding common ground
- Learn to help yourself and others focus on interests and not take unreasonable positions

Managing Conflict and Negotiating Agreement
1 Day

Course Topics

Sources of Conflict
- Group activity to define conflict and identify sources of workplace conflict
- Demonstrating leadership in dealing with conflict
- Identifying what you can control and what you cannot

Conflict Management Approaches and Dealing with Conflict Situations
- Conflict modes: assertiveness and cooperation
- Personal conflict style inventory (adapted from the Kraybill conflict style model)

Description and appropriate uses of each conflict mode

Introduction to Negotiation: Getting to Yes
- Separate the people from the problem
- Focus on interests, not positions
- Invent options for mutual gain
- Insist on using objective criteria
- The Ultimatum Game
- Using emotions as you negotiate
- Practice activity: conflict scenarios

Course Schedule

	Topics
AM	• Sources of conflict • Conflict management modes
PM	• Intro to negotiation • Getting to Yes practice activities

Managing Conflict and Negotiating Agreement

1 Day

Field of Study	Leadership and Decision Making
Course Level	Senior level and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Any other CI leadership course

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Emotional Intelligence for Leadership and Self-Awareness

1 or 2 Day

Business Need:

Research on emotional intelligence has shown that successful performance on the job is significantly impacted by the skills and attributes of emotional self-awareness, stress management, and the ability to pick up on social cues and build effective working relationships. While we may know the right thing to do in a given situation, we are often “hijacked” by our emotions in stressful situations and behave in ways that interfere with our own and our team’s success.

Course Description:

Through Emotional Intelligence (EI) for Leadership and Self-Awareness, participants increase their understanding of emotional intelligence and learn how a greater awareness of EI increases their effectiveness as a leader, manager, and public servant. They explore the results of a behavioral-based personal EI assessment in relation to the five core competencies of EI, and then learn skills to apply their EI awareness in the workplace. The EI workshop covers both intrapersonal and interpersonal intelligence, the ability to understand the intentions, motivations, fears, and desires of others and self, and the impact of increased EI on our lives and the decisions we make.

Course Objectives:

- Discover what emotional intelligence is and why it matters
- Take the Bar-On EQ-i assessment and raise awareness of one’s EI competencies
- Identify emotional patterns – personal strengths and weaknesses
- Effectively manage behaviors that may limit optimal performance
- Discover how emotional intelligence can enhance work performance
- Explore EI as a leadership competency

Emotional Intelligence for Leadership and Self-Awareness

1 or 2 Day

Course Topics

What is Emotional Intelligence?

- History and perception of Emotional Intelligence
- Emotional Intelligence and leadership effectiveness
- The business case of emotional intelligence

Emotional Intelligence Model

- Introduce emotional intelligence model
- Introduce emotional self-scan model to identify and acknowledge the emotion and physical symptoms

EI Competencies

- Review the emotional intelligence competencies and the behaviors expressed in each competency

Personal Emotional Intelligence Assessment

- Review personal emotional intelligence assessment results

Values and EI

- The impact of values on emotions and feelings

Emotions and Levels of Intensity

- Heightened awareness and response to emotional situations
- Recognizing personal triggers and identifying strategies

Awareness Wheel

- Processing internal and external experiences through the dimensions of the Awareness Wheel

Building Personal and Social Competence

- Strategies to develop emotional intelligence in these areas

Emotional Intelligence for Leadership and Self-Awareness

1 or 2 Day

Course Schedule (1 day program)

	Topics
AM	• What is Emotional Intelligence? • Emotional Intelligence Models • Emotional Intelligence Competencies • Bar-On EQ-i Assessment Review
PM	• Values and EI • Emotions and Intensity • Building Personal and Social Awareness • Action Planning

Course Schedule (2 day program)

Topics	Day 1	Day 2
AM	• What is Emotional Intelligence? • Emotional Intelligence Models • Emotional Intelligence Competencies	• Ladder of Inference • Differentiating Data, Thoughts, and Feelings • Awareness Wheel
PM	• Bar-On EQ-i Assessment Review • Values and EI • Levels of Intensity • Feelings and Emotions	• Building Personal and Social Awareness • Action Planning

Emotional Intelligence for Leadership and Self-Awareness

1 or 2 Day

Field of Study	Leadership Development
Course Level	Beginner to Advanced
Credits	
Learning Methods	
Equipment	Projector and Screen, Easel and Chart, Bar-On EQ-i 2.0 Assessment
Suggested Prerequisites	None
Recommended Follow-up Courses	Conflict Management and Negotiations

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. The webinars typically don’t include the Bar-On assessment, although that can be added. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Coaching

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Coach Training
3 Days

Business Need:

CI International's Coach Training prepares leaders to serve as coaches within their organization, typically in service to participants in a leadership program. It advances participants' communication skills and shows them how to instill independent decision-making and confidence. Participants will find that they will use the skills informally on a daily basis, enhancing their ability to grow employees as well.

Course Description:

Our Coach Training Workshop makes clear the distinction between a mentoring role—where you share career lessons and provide advice gleaned from your own experience—and true coaching—where you inspire employees to find the answers for themselves. Participants will learn techniques and tools to actively encourage others to acquire a deeper level of independent thinking. Participants will also cultivate the desire to come up with original solutions to their challenges. Participants will be prepared to conduct hour-long coaching sessions with internal "clients."

Course Objectives:

- Listen deeply and intently
- Ask thought-provoking questions
- Provide clear, useable feedback
- Increase accountability
- Learn a coaching model
- Learn 20 coaching skills

Course Topics

Enhancing Communication

- Use mental models to manage our own natural inclination to make assumptions and draw conclusions
- Help clients question assumptions and better sell their ideas
- Understand the three levels of listening and significantly increase their skill level
- Learn the Socratic art of using powerful questions to grow independent problem solvers
- Conduct exercises to increase communication skills

Values

- Learn how to draw out a client's core values and how to use them to inspire and motivate the client

Extensive Practice and Feedback

- Fully one third of the class is observing a certified coach's demonstrations, practicing the skills and receiving in-the-moment feedback to hone their skills

Ready for Service

- Understand how to develop a coaching agreement with clients
- Know how to conduct a full coaching session

Course Schedule

Day	Day 1	Day 2	Day 3
AM	• Difference between coaching, mentoring, and counseling • Three levels of listening • Listening exercises	• Coaching practice using self-reflection homework • Understand the program requirements for the program in which they will serve as coaches • Values Exercise and how to use core values in coaching	• Debrief homework • Understand the 20 coaching skills and when/how to use them • Develop initial Discovery Session and practice
PM	• Powerful versus information--gathering questions • Appreciative Inquiry • Ladder of Inference • Awareness Wheel • Inquiry exercises	• 7-step Coaching ModelDemos of each step with a practice session of each step with in-the-moment feedback	• Conduct full practice coaching session with in-the-moment feedback • Understand several feedback models and the role of feedback in coaching • Set clients off ready to coach

Field of Study	Coach Training
Course Level	Intermediate Level of Listening
Credits	
Learning Methods	
Equipment	Projector and Screen
Suggested Prerequisites	None
Recommended Follow-up Courses	• Mentor Coaching • Next-level Coach Training

Delivery Formats:

We customize our delivery to meet your specific requirements. This particular workshop can also be offered in a 2-day version. The primary difference is in the amount of practice participants will be able to engage in. There is also the opportunity for hybrid delivery using both in-person and online methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Executive Coaching

10 one-hour sessions recommended

Business Need:

Today's leaders are faced with high rates of change, a workforce with great expectations, and a challenging business climate. This requires them to quickly learn new skills to adapt and thrive. Unfortunately, this is often when they have less time to devote to their own professional growth. CI International's executive coaching provides targeted, professional development designed for a leader's unique circumstances, resources, and style.

Course Description:

CI's executive coaching is designed to improve job performance and produce business results – it's about taking good leaders to the next level of effectiveness. Through the coaching sessions, and in conjunction with input from the participant's manager, participants identify strengths that need to be further leveraged, skills to be added and enhanced, and specific gaps they need to close to achieve the organization's objectives. Participants then identify clear measures of success and visible behavior changes that will be required. The coaching process, combined with real-time application, optimizes the participant's unique style, draws on previous experience and training, and ultimately creates more effective leaders to meet business needs.

By integrating current challenges into the coaching process, the participant tests new skills, behaviors, and attitudes, and experiences the satisfaction of progress made and lessons learned. Each session concludes with an agreed-on, achievable action list that moves the participant closer to the desired outcomes.

Course Objectives:

- Identify core issues behind current challenges and situations
- Apply past training and experiences to current challenges
- Utilize the participant's "best" in the area of personality, style, and skill set
- Remove barriers to success
- Identify ways to further leverage strengths
- Enhance communication, interpersonal, and leadership skills

Executive Coaching
10 one-hour sessions recommended

Course Topics

Enhancing Communication

Coaching is a highly individualized service that addresses the specific developmental needs and desires of the participant. Topics covered in coaching may include:

- Change management
- Communication
- Confidence-building
- Customer service
- Efficiency, time management, and organization
- Handling difficult people
- Image enhancement
- Leadership presence
- Mission, vision, and values clarification
- Problem-solving
- Relationship Management
- Strategic thinking
- Strategic relationship-building
- Team and Leadership Development
- Work-Life balance

Field of Study	Professional Development
Course Level	Beginner to Advanced
Credits	
Learning Methods	
Equipment	
Suggested Prerequisites	None
Recommended Follow-up Courses	

Delivery Formats:

In-person coaching sessions are typically done over the phone. For telephone coaching, a private office or conference room and a headset or speakerphone are recommended. If done in person, the sessions are conducted at the participant's location. The participant is responsible for arranging a private office, free of distractions, and an easel and pad at the coach's request. The coach's travel expenses are the responsibility of the participant.

Communications

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Interpersonal Communication Workshop

1 Day

Business Need:

The solutions to the problems that face organizations are largely found within the organizations themselves. There are individuals and teams within the organization who know what needs to be done yet whose voices often go unheard. How can great ideas be more effectively communicated? How can we better hear and understand the great ideas of others? If we can answer these questions we would markedly improve our workplaces.

"We just need to communicate better" has become a common lament in organizations. In fact, it's heard so often that poor communication starts to seem like something we just need to accept. No notion could be more dangerous. Our failure to hear and to be heard is at the heart of most organizational problems. This workshop was developed to provide individuals and teams with the communication tools necessary to achieve success.

Course Description:

Our Interpersonal Communication Workshop helps participants acquire new tools for effective interpersonal communications. A set of skills and tools are examined that can break through the barriers that typically restrict effective communications. While there is far more to clear communications than simply using a tool or following a checklist, an understanding of these communication-enhancing tools will minimize the likelihood of missed opportunities or miscommunications. Through discussion, practice, and interactive exercises participants will learn how to put these skills to use in creating an environment for effective communications to take place.

Course Objectives:

- Examine mental models and how they shape our view of the world
- Acquire new tools for effective interpersonal communications
- Learn the art and science of skillful discussion
- Develop skills for giving and receiving feedback

Interpersonal Communication Workshop
1 Day

Course Topics

Listening
- What makes it hard
- Understanding and applying the three levels of listening

Mental Models
- How we adopt beliefs
- Understanding how our "ladder of inference" impacts our view of the world
- Avoiding the "fundamental attribution error" in interacting with others

Skillful Discussion
- Balancing advocacy and inquiry
- Managing our "ladder of inference" in order to best influence others
- Being open to the influence of others

Giving and Receiving Feedback
- Application of skillful discussion
- Using "Johari Window" to understand our own and others' blind spots
- Learn and apply a 6-step feedback model

Course Schedule

	Topics
AM	• Listening • Ladder of Inference • Skillful discussion
PM	• Johari Window • Giving and Receiving Feedback

Interpersonal Communication Workshop

1 Day

Field of Study	Communication
Course Level	Beginner to Mid-Level
Credits	
Learning Methods	
Equipment	Projector and Screen; Easel, pads, and markers; Separate, small room for coach and participant to view presentations
Suggested Prerequisites	None
Recommended Follow-up Courses	• High Impact Communications • High Impact Writing • Collaboration for Enhanced Effectiveness

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

High Impact Communication
2 Days

Business Need:

Enhanced skill and newfound confidence in communication are life skills that can be applied while speaking before groups, participating in and conducting meetings, working with or leading a team, or simply communicating one-on-one. Even effective communicators will have the opportunity to learn new skills and gain experience to make them even better communicators who command respect and authority.

Course Description:

Communication at its best is a two-way process requiring not only the ability to speak so others will listen, but also the ability and discipline to listen while others speak. Listening skills are as essential as speaking skills – and are often overlooked. Individuals learn techniques to increase their comprehension and retention, and also learn to look like they are listening. Both aspects of communication need to be learned, adhered to, and practiced in order for an individual and an organization to operate at its best.

Course Objectives:

- Enhance the ability to speak so others will listen – and listen while others speak
- Learn techniques to better communicate by enhancing the ability to better connect
- Add to personal power and confidence by learning the most effective techniques to communicate with increased confidence, authority, and efficiency
- Acquire non-verbal communication skills to command presence and enhance credibility
- Learn a powerful tool that will help focus thinking and organize thoughts
- Organize and deliver high-impact, professional-level briefings and presentations
- Learn techniques to inform, inspire, persuade, and call others to action
- Learn to think and speak under pressure
- Improve the ability to make a positive impact within a diverse workforce

High Impact Communication
2 Days

Course Topics

Listing

- Understand how good listening is a core component of communication
- Identify the levels of listening

Increase Awareness to Improve Effectiveness

- Learn the three key tools for confident, compelling communication
- Put the tools into practice through 4 progressively more challenging presentations (2-4 minutes each)
- Work one-on-one with a coach viewing your 4 presentations on video
- Create an improvement plan for each successive workshop presentation

Establish Accountability and Credibility with Employees, Peers, and the Public

- Tools and practice for communicating in a succinct, targeted manner
- Action tips for dealing with Q&A sessions
- Interruptions and time wasters

Action Planning

- Identify ways to transition tools from the workshop to the workplace
- Plan specific actions and approaches to take the next step up in communication effectiveness

Course Schedule

Day	Day 1	Day 2
AM	• Psychological barriers to good speaking • Listening • Presentation • One-on-one coaching	• Exercises to enhance the 3 tools • Presentation • One-on-one coaching
PM	• Three tools for enhancing confident speaking • Tool to pull thoughts together quickly and effectively • Presentation • One-on-one coaching	• Tool to use to effectively persuade and sell your ideas • Presentation • One-on-one coaching • Tips for Q&A sessions • Practice Q&A session using real questions from your presentation

High Impact Communication

2 Days

Field of Study	Communication
Course Level	Beginner to Advanced
Credits	
Learning Methods	
Equipment	Projector and Screen; Easel, pads, and markers; Separate, small room for coach and participant to view presentations
Suggested Prerequisites	None
Recommended Follow-up Courses	• Interpersonal Communication • Collaboration for Enhanced Effectiveness • Building the Team • Leading Change

Delivery Formats:

This 2-day workshop is best offered entirely in person. However, we customize our delivery to meet your specific requirements and this workshop can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

High-Impact Writing

Business Need:

Organizational credibility and productivity are tied directly to the ability to convey ideas and concepts in easy to understand straightforward language.

Course Description:

Bearing little, if any, resemblance to English composition courses, High-Impact Writing focuses on developing professional writing skills through guided practice and personalized coaching. Even if writing doesn’t come naturally to you, our research-based techniques will quickly build your skills and confidence through a customized combination of classroom work and individual coaching. You’ll learn techniques you can apply right away to get your messages across faster and better. High-Impact Writing has made a difference at Fortune 500 companies such as Google and Starbucks, all 15 federal cabinet departments, and the White House.

Course Objectives:

- Gain insight into the keys to clear and precise writing
- Learn to organize your thoughts
- Focus your writing and write to the point for the convenience of the reader
- Review the basics, build on them, and learn new techniques
- Establish your own unique writing style and set a higher writing standard: professional, positive, pointed, powerful

High-Impact Writing

Course Topics

Content
- Understanding your audience
- Understanding your purpose
- The 3 key questions to answer before you write
- Persuasive writing

Organization:
- Making navigation simple
- How to grab and hold interest
- Effective use of headings, bullets, and tables

Wording:
- Catching the right tone
- “Punching up” weak and passive verbs
- Finding and fixing wordiness

Course Schedule

	Topics
	TBD

Field of Study	Communications
Course Level	All levels; particularly important for mid-level and senior leaders
Credits	
Learning Methods	Individual practice, Group activities, Coaching
Equipment	Projector and Screen, Flip Chart
Suggested Prerequisites	None
Recommended Follow-up Courses	Increasing Productivity with Outlook

Delivery Formats:

This 2-day workshop is best offered entirely in person. However, we customize our delivery to meet your specific requirements and this workshop can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Productivity & Efficiency

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Time and Email Management Training
1 Day

Business Need:
All organizations are challenged to effectively garner high productivity of their most valuable resource – their human resource. This challenge becomes even more critical during times of downsizing, re-organization, and other changes within organizations. Workers must be given the organizational and productivity education to assist them in reaching their full potential. Learning how to manage time, emails, and tasks effectively supports achieving job objectives and being fully accountable.

Course Description:
This is a one day workshop that will focus on the theory and application of time, task, and email management. Participants will learn how to reclaim their email in-boxes by effectively managing the daily deluge of incoming information. Clear guidance will be given on how to file and organize email information for easy filing and immediate access. In addition, email guidance on best practices for writing for efficiency and protocol will also be discussed. Participants will learn how to prioritize and manage their time efficiently, utilizing their electronic productivity tools (i.e. Outlook, Gmail, and Lotus Notes) to their full potential. Systems and options will be introduced to manage tasks to assist in accountability and completing actions in a timely manner.

Course Objectives:
- Learn how to manage, track, and organize email more effectively
- Gain strategies in creating effective email communications
- Understand the process of prioritizingand developing systems to identify priorities
- Manage action items and tasks effectively through electronic task tools
- Gain strategies on how to acquire the time to get high priority and high value action items done
- Learn to manage office interruptions successfully
- Utilize electronic productivity tools (i.e. Outlook, Gmail, and Lotus Notes) more efficiently to track calendar, tasks, and contacts
- Maintain organization through effective daily and weekly planning
- Identify and articulate participant commitments to being and staying organized and efficient

Time and Email Management Training
1 Day

Course Topics

Email Management and Efficiency

- Learn the three key strategies to managing email
- Learn the five steps to process email inboxes
- Learn strategies to tag and identify email action items
- Learn the four ways to organize, save, and file email messages
- Understand how and why to archive email messages
- Gain strategies on how to deal with large inboxes
- Learn about the search functions within the email system
- Learn how to maximize functionality with email systems to improve efficiency
- Gain skills on how to manage email with mobile devices

Creating Effective Email Communications

- Understand the purpose and reason for email etiquette and protocol
- Learn how to write effective email subject lines
- Gain strategies in getting quick email response
- Understand formatting guidelines to make email easy to read and respond to
- Review the basic contents to get quick responses and improve communications
- How to respond to inappropriate email messages
- Understand basic legality to email retention
- Learn key questions to ask before sending an email
- Review the basic international protocol with email communications

Time Management

- Understand time management principles and theory
- Understand the steps in becoming an effective time manager
- Understand the process of prioritizingand developing systems to identify priorities
- Gain strategies for successful calendar management to improve time allocation
- Learn how to utilize calendar functions in time management tools (i.e. Outlook, Gmail, and Lotus Notes) more effectively
- Learn the six steps to effectively planning your day/week
- Learn the four steps to being more proactive and less reactive
- Understand the best working zone to accomplish the right tasks in the right place
- Learn to manage office interruptions successfully

Course Topics (Continued)

Time Management (Continued)

- Learn strategies to manage procrastination proactively
- Understand how to utilize mobile devices to support time efficiencies

Task Management

- Understand how to identify, choose, and track priorities
- Learn the different types of tasks and how best to manage and accomplish them
- Review the types and benefits of different task list systems
- Understand how to track and maintain task lists
- Understand how to use the task list system in productivity systems (i.e Outlook, Gmail, Lotus Notes)
- Learn the four steps to managing task lists
- Gain tips on how to get tasks done in your day and week
- Understand the 7 reasons why task lists fail
- Learn strategies on how to focus and multi-task effectively

Course Schedule

	Topics
AM	• Email Management and Efficiency • Creating Effective Email Communications
PM	• Time and Task Management

Time and Email Management Training

1 Day

Field of Study	Productivity and Efficiency
Course Level	Beginner to Intermediate
Credits	
Learning Methods	Interactive Discussion, Classroom Exercises, Computer Training Demonstration
Equipment	Projector and Screen, Flip Chart
Suggested Prerequisites	None
Recommended Follow-up Courses	• Increasing Productivity with Outlook

Delivery Formats:

We customize our delivery to meet your specific requirements. Instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Efficiency, Productivity, and Time Management

2 Days

Business Need:

All organizations are challenged to effectively garner high productivity of their most valuable resource – their human resource. This challenge becomes even more critical during times of downsizing, reorganization, and other changes within organizations. Workers must be given the organizational and productivity education to assist them in reaching their full potential. Learning how to manage time and tasks effectively supports achieving job objectives and being fully accountable to the organization.

Course Description:

This practical, hands-on two-day productivity seminar is designed for all personnel within an organization. It is formatted with the intention of providing participants understanding of organizational theory, productivity and time management best practices through morning classroom training. To assist in implementation and customization, the afternoons are allocated for one-on-one efficiency coaching sessions for each participant. This valuable consulting time encourages participants to take action immediately and implement new organizational systems immediately during the training.

Course Objectives:

- Learn to build an intuitive filing system for paper, email and electronic documents
- Learn to sort and organize incoming data from email and paper
- Manage phone and email communications in a timely manner
- Discover how to become ‘paperless’ and be more organized electronically
- Understand the process of prioritization and developing systems to identify priorities
- Manage action items and tasks effectively through electronic task tools
- Gain strategies in how to acquire the time to get high priority and high value action items done
- Learn to manage office interruptions successfully
- Create a project timeline and action plan for any project
- Communicate delegated tasks effectively
- Conduct effective meetings to build team accountability and trust

Course Objectives (continued):

- Utilize electronic productivity tools (i.e. Outlook, Gmail, Lotus Notes) more efficiently to track calendar, tasks and contacts
- Maintain organization through effective daily and weekly planning
- Identify and articulate participant commitments to being and staying organized and efficient

Course Topics

Basic Principles of Organization

- Understand the fundamentals of organizing theory

Records Management Best Practices

- Learn to build an effective hierarchical filing system for all document management systems
- Understand records retention requirements, regulations, and guidelines
- Learn best practices for managing, organizing, and accessing information
- Learn strategies on how to purge and reduce paper and become more 'paperless'
- Learn how to create a system for managing desktop and active paper files

Organizing Electronic Records

- Learn how to organize electronic documents on local drives and cloud based systems
- Understand the various record management locations
- Learn how to effectively name documents for easy retrieval and access
- Gain searching strategies to find information quickly with electronic tips and tricks
- Learn the definition of "metadata" and how to input information to maximize search results
- Effective strategies of using the desktop to manage information

Email Management and Efficiency

- Learn the three key strategies to managing email
- Learn the five steps to process email inboxes
- Learn strategies to tag and identify email action items
- Learn the four ways to organize, save, and file email messages

Course Topics (Continued)

Email Management and Efficiency (Continued)

- Understand how and why to archive email messages
- Gain strategies on how to deal with large inboxes
- Learn about the search functions within the email system
- Learn how to maximize functionality with email systems to improve efficiency
- Gain skills on how to manage email with mobile devices

Time Management

- Understand time management principles and theory
- Understand the steps in becoming an effective time manager
- Understand the process of prioritization and developing systems to identify priorities
- Gain strategies for successful calendar management to improve time allocation
- Learn how to utilize calendar functions in time management tools (i.e. Outlook, Gmail, and Lotus Notes) more effectively
- Learn the six steps to effectively planning your day/week
- Learn the four steps to being more proactive and less reactive
- Understand the best working zone to accomplish the right tasks in the right place
- Learn to manage office interruptions successfully
- Learn strategies to manage procrastination proactively
- Understand how to utilize mobile devices to support time efficiencies

Task Management

- Understand how to identify, choose, and track priorities
- Learn the different types of tasks and how best to manage and accomplish them
- Review the type and benefits of different task list systems
- Understand how to track and maintain task lists
- Understand how to use the task list system in productivity systems (i.e Outlook, Gmail, Lotus Notes)
- Learn the four steps to managing task lists
- Gain tips on how to get tasks done in your day and week
- Understand the 7 reasons why task lists fail
- Learn strategies on how to focus and multi-task effectively

Course Topics (Continued)

Getting Projects Done

- Understand the basics of the project planning cycle
- Learn how to break down projects and large tasks
- Learn options to track projects using Microsoft Office programs
- Gain insight on how to develop timelines and estimate length of projects
- Discover key tips for leading and managing projects
- Learn strategies of how to delegate tasks and follow-up effectively
- Identify methods to maintain and track project documentation
- Learn key tips to managing multiple projects

Meeting Management

- Understand the common challenges to meetings
- Learn the 5 questions to ask before planning a meeting
- Identify the key aspects to cover when planning an agenda
- How to develop rules of engagement for high-impact meetings
- Understand the key role of a meeting facilitator
- Learn how to conduct effective meetings to build team strength and trust
- How to capture and record meeting notes for effectiveness
- Discover how to manage difficult and challenging participants in meetings

Course Schedule

Day	Day 1	Day 2
AM	• Basic Principles of Organization • Records Management Best Practices • Organizing Electronic Records • Email Management and Efficiency	• Time Management • Task Management • Getting Projects Done • Meeting Management
PM	• One on One Efficiency Consulting and Coaching Sessions with Participants	• One on One Efficiency Consulting and Coaching Sessions with Participants

Efficiency, Productivity, and Time Management

2 Days

Field of Study	Productivity and Efficiency
Course Level	Beginner to Intermediate
Credits	
Learning Methods	Interactive Discussion, Classroom Exercises, Computer Training Demonstration
Equipment	Projector and Screen, Flip Chart
Suggested Prerequisites	None
Recommended Follow-up Courses	

Delivery Formats:

This 2-day workshop is best offered entirely in person. However, we customize our delivery to meet your specific requirements and this workshop can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Becoming a Paperless Office

½ Day

Business Need:

Companies have the opportunity to not only 'green' their offices with paper reduction but also create improved efficiency and productivity. Some people waste as much as 25% of their day searching for information they need to make decisions, complete projects, or manage their business. Paper is the number one material thrown away and also one of the biggest polluting industries. The typical U.S. office worker uses about 10,000 sheets of copy paper each year. With the current projected document growth this increase is expected to double in the next two years.

Course Description:

In this training, participants will learn how to minimize paper. Through easy and simple paperless office steps, offices can reduce their paper consumption immediately by 20-30%. Participants will learn how to reduce this amount of paper by becoming more organized electronically with improved data and information management. Ideas on policies will also be introduced on how to minimize copies, printing, and duplication in the office. Printer and scanning options and strategies will also be reviewed.

Course Objectives:

- Understand the environmental, cost, and efficiency benefits of reducing paper
- Gain an understanding of why users print documents and ways to overcome the habit
- Learn how to improve electronic data management through automation and organization
- Discover other electronic format options instead of printing
- Understand other ways to manage data to reduce paper
- Learn easy and simple paper reduction measures in the office

Becoming a Paperless Office

½ Day

Course Topics

Understand the Challenges of Paper Use

- Understand the challenges of using paper
- Understand the environmental impacts of using paper
- Learn about the cost and efficiency benefits of reducing paper
- Understand the reasons why users still print documents

Ways to Reduce Paper

- Understand how to utilize available technology to reduce paper
- Learn how to reduce paper through better electronic organization of documents
- Discover other electronic ways to manage and process information instead of through paper
- Understand basic printer and scan functions options to reduce paper
- Gain strategies on tracking meeting notes electronically
- Learn easy and simple paper reduction measures in the office
- Review of key office paper policies to reduce paper consumption

Using Technology Tools

- Learn about applications that can improve efficiency and reduce paper
- Gain strategies in using mobile devises to reduce paper

Delivery Formats:

This half-day workshop can also be offered as a 2-hour webinar. We customize our delivery to meet your specific requirements. Instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Work-Life Balance

Business Need:

In today's technology and fast-paced world it is very difficult to maintain a sense of work/life balance. Work seems to penetrate into after hours and on weekends resulting in the feeling of being overwhelmed, stressed and a general lack of enthusiasm for life. The American Institute of Stress claims that stress is American's number one health problem with work being the major culprit. Today workers need clarity, skill, and education on how to attain and maintain work/life balance.

Course Description:

This half day workshop will focus on how workers can gain more work/life balance into their life. The first part will be to help participants to identify and clarify what work/life balance means to them. Then, through facilitated dialogue, the participants will discuss the challenges and barriers that impede work/life balance. In-depth instruction is provided on how participants can use their electronic productivity tool (i.e. Outlook, Gmail, and Lotus Notes) to support their work/life balancing strategies. Participants will also learn how to set attainable goals, prioritize, and manage interruptions and procrastination during their day. To support work/life effectiveness goals, participants will also learn how to prioritize and plan their day/week.
Upon completion of the class each participant will develop commitments and an action plan.

Course Objectives:

- Understand time management principles and theory
- Understand the steps in becoming an effective time manager
- Understand the process of prioritization and developing systems to identify priorities
- Gain strategies on how to achieve work/life balance

Course Topics

Achieving Work/ Life Balance

- Define “work/life” balance and how it applies to participants
- Determine accountability triggers to support achieving work/life balance
- Learn how to utilize productivity and time management tools more effectively
- Discover how to prioritize incorporating work/life balance strategies
- Gain strategies in how to acquire the time to get important personal activities integrated into the calendar
- Understand how to maintain work/ life balance through effective daily and weekly planning

Time Management Strategies

- Understand time management principles and theory
- Understand the steps in becoming an effective time manager
- Understand the process of prioritization and developing systems to identify priorities
- Gain strategies for successful calendar management to improve time allocation
- Learn how to utilize calendar functions in time management tools (i.e. Outlook, Gmail, and Lotus Notes) more effectively
- Learn the four steps to being more proactive and less reactive
- Understand the best working zone to accomplish the right tasks in the right place
- Learn to manage office interruptions successfully
- Learn strategies to manage procrastination proactively
- Understand how to utilize mobile devices to support time efficiencies

Field of Study	Productivity and Time Management
Course Level	Beginner to Intermediate
Credits	
Learning Methods	Interactive Discussion, Classroom Exercises, Computer Training Demonstration
Equipment	Projector and Screen, Flip Chart
Suggested Prerequisites	None
Recommended Follow-up Courses	

Delivery Formats:

This half-day workshop can also be offered as a 2-hour webinar. We customize our delivery to meet your specific requirements. Instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Efficiency and Productivity Coaching

8 Hour Minimum

Business Need:

Over two hours are wasted daily per employee due to disorganization. That's more than ten workweeks a year of valuable time wasted. Over 80% of filed data is never referenced again. Workers are busy, but are they getting done what matters most?

It is essential that individuals be provided with organizational and time management coaching that will allow them to strategically organize their time, email, paper, projects, computer documents, and communications so they can work effectively.

Course Description:

This one-on-one coaching for organizational and time management skills is a positive and transformative experience that offers both professional and personal benefits. It is designed with a high level of accountability in order for both the organization and the individual to receive the highest possible return on the investment of time and resources.

Course Objectives:

- Learn to organize and manage data in paper, email, and electronic formats
- Manage and respond effectively to email communications
- Discover ways to find information quickly and easily
- Discover how to manage time effectively using electronic productivity tools
- Maintain organization through effective daily and weekly planning
- Manage action items through a master electronic task list
- Identify and articulate your commitments to being and staying organized

Efficiency and Productivity Coaching
8 Hour Minimum

Course Topics

This is a highly customized service so time is focused on the specific needs of the individual that may include multiple areas of Time Management and Efficiency

- Managing email
- Prioritizing work
- Developing an email filing system
- Handling interruptions
- Electronic filing for quick access
- Identifying next steps beyond the coaching
- Maximizing the use of the client's email software such as Outlook or Lotus Notes
- Project management

Course Schedule

	Topics
AM	• Discover what systems and practices are working • Identify barriers to efficiency • Purge unnecessary information, files, emails
PM	• Develop time and information system that suits the client's type and style of information retrieval and work • Move information into the new system • Practice use of the new systems

Efficiency and Productivity Coaching

8 Hour Minimum

Field of Study	Productivity and Efficiency
Course Level	Beginner to Advanced
Credits	
Learning Methods	
Equipment	Client’s computer
Suggested Prerequisites	None
Recommended Follow-up Courses	• Time, Email, and Priority Management • Project Management

Delivery Formats:

The sessions are conducted at the client’s location. The client is responsible for arranging a private office free of distractions, and an easel and pad at the coach’s request. The coach’s travel expenses are the responsibility of the client.

Teams (workshops)

CI International

achieve long-term success today

Collaboration for Enhanced Effectiveness Workshop

2 Days

Business Need:

The 21st century requires real collaboration; a bringing together of all the knowledge, possible solutions, needs, and funding of multiple, well-informed stakeholders. This will require a fundamental shift in approach and yes, culture; a shift from being the expert authority figure in the room to an open, adaptable, equal partner operating with visible mutual respect and cooperation.

The interdependence that will be required highlights the need for new and enhanced skills in listening, understanding multiple perspectives, diplomacy, political savvy, conflict resolution, and negotiation. Collaborating to find a resolution that satisfies all or even possibly conflicting priorities can stimulate new approaches to old problems. Creativity and innovation are by-products of collaboration and well-managed conflict.

Unfortunately, many people are afraid of or avoid conflict. As a result, conflict goes underground, sabotaging projects and destroying team or cooperative spirit.

Course Description:

This workshop includes a “cost/benefit analysis” of a collaborative approach, how to find common ground while discovering each party’s perspective, and how to reach an equitable agreement on what should be done, who should do what, and when.

Course Objectives:

- Understand the personal and organizational transition process toward a more collaborative approach and where you are in it
- Understand the modes of engaging during disagreement
- Identify your preferred mode during disagreement
- Learn and gain skills in the 6 keys to successful collaboration
- Develop a personal action plan to increase collaboration
- Practice for enhanced competence and anchoring of the tools
- Discuss existing processes that may be hindering this culture shift

Collaboration for Enhanced Effectiveness Workshop

2 Days

Course Topics

Collaboration

- Understand what collaboration is
- Identify the benefits of collaboration
- Identify the cost of collaboration

Change and Transition

- Learn the stages of transition
- Conduct strength-building activities to identify and acknowledge loss in transition

Modes of Conflict

- Identify modes of conflict and how we choose to engage
- Use the Thomas Kilman Conflict assessment to learn individual conflict styles
- Small group exercises to learn and discuss conflict and engagement

Enhancing Communication Tools

- Use mental models to manage our natural inclination to make assumptions and draw conclusions
- Understand how good listening is a core component of good communication and collaboration
- Balance advocacy with inquiry to generate quality discussion
- Conduct exercises to increase communication skills

Negotiation

- Learn how to address people issues first before seeking solutions
- Help colleagues and stakeholders identify interests rather than positions
- Invent options for mutual satisfaction
- Evaluate decisions using objective criteria

Case Study

- Use enhanced tools and skills to complete a case study

Action Planning

- Identify ways to transition collaboration attributes from the workshop to the workplace
- Plan specific actions and approaches to fulfill collaboration for enhanced effectiveness

Collaboration for Enhanced Effectiveness Workshop

2 Days

Course Schedule

Day	Day 1	Day 2
AM	• Collaboration small group activity • Stages of Change • Identify the losses • Modes of Conflict • TKI	• Skillful Discussion • Listening Skills • Balancing Advocacy and Inquiry • Ladder of Inference • Skillful Discussion Practice Activities • Negotiation
PM	• Modes of Conflict • TKI Assessment	• Case Study • Action Planning

Field of Study	Teams
Course Level	Beginner to Intermediate
Credits	
Learning Methods	
Equipment	Projector and Screen, Flip Chart, Online Survey
Suggested Prerequisites	None
Recommended Follow-up Courses	• Interpersonal Communication • Emotional Intelligence

Delivery Formats:

This 2-day workshop is best offered entirely in person. However, we customize our delivery to meet your specific requirements and this workshop can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Leading Project Teams

1 Day

Business Need:

In today's business environment, managers are expected to do more with less while improving organization performance. Many managers and team leads support cross-functional projects aimed at improving performance and meeting customer needs. Implementing a project management approach uses project management as a tool for getting things done, for improving performance and productivity, and for changing the organization.

Course Description:

Today, how do managers measure the success of their projects? Do the managers and team leads in your organization have the tools to provide project leadership? This workshop will identify proven methods to increase productivity, reduce stress, and increase confidence of team leaders.

The workshop provides practical skills to enable leaders to manage projects and increase the team's performance. The session will help team leaders and team members identify their mission and vision, determine their operating standards for getting there, and provide a clear understanding of the expectations for achievement.

Course Objectives:

- Learn about the principles of project management
- Develop a project plan/charter to clarify the mission of the team and key measures that define success
- Clarify roles and responsibilities to improve team performance and accountability
- Communicate effectively with your team, management, and clients
- Run productive project meetings for planning, brainstorming, status update, and problem solving
- Evaluate the project's success and lessons learned
- Approach conflict situations with the mindset that a solution agreeable to all is possible
- Making values-based decisions

Leading Project Teams
1 Day

Course Topics

Fundamentals of Project Management
- Key activities in the life cycle
- Selecting, initiating, and chartering the project
- Defining the project

Project Planning and Reporting
- Planning and scheduling the project
- Problem-solving and decision-making techniques
- Managing relationships and team member expectations
- Closing out the project and continuous improvement

Course Schedule

	Topics
AM	• Defining project management • Fundamentals of PM
PM	• Project planning and reporting • Problem solving • Relationships and expectations • Ending the project well

Field of Study	Teams
Course Level	Beginning and mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Meeting Management; Meeting Facilitation; Collaboration for Enhanced Effectiveness

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and “hands-on” learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Meeting Management

Business Need:

The cost of ineffective meetings is staggering, not only in terms of wasted time but also in terms of lost opportunities, employee frustration, and poor morale. Most managers say the meetings they attend generally take too long, cover too little or too much, and end without specific plans, objectives, decisions, outcomes, or results. Meetings are an important business function in that they get people together to share information, ideas, problems, activities, solutions, and feelings. But poor meetings often have a negative impact and can make whatever problem they're supposed to address worse.

Course Description:

This workshop provides practical tools and skills for planning, leading, and participating in a meeting. Workshop participants will gain insight into how to craft a sound agenda, tap into the collective wisdom of the group to gather data, make decisions, and develop effective action plans to make the decisions reached in the meeting a reality.

This is a practical, hands-on workshop that participants can put to immediate use. As a direct result of this training, participants will have the tools they need to make their future meetings more effective and their organizations more successful.

Course Objectives:

- Successfully plan a meeting
- Design a practical agenda
- Keep the meeting on track
- Be a more effective meeting participant
- Increase group participation
- Make better decisions as a team

Course Topics

Cost of Poor Meetings
- Lost productivity
- Disengaged employees

Communications Models
- Ladder of Inference
- Skillful discussion

The Meeting as a Process
- Crafting an effective agenda
- Planning the meeting
- Opening the meeting
- The heart of the meeting
- Closing the meeting/action planning

Addressing People Issues
- Task vs maintenance behaviors
- Dealing with emotions
- Feelings/facts/solutions

Information Gathering Tools
- Brainstorming
- The “5 Whys”
- Contingency Diagram
- Pareto analysis

Decision Making Tools
- Multi-voting
- Nominal Group Technique
- Pairwise ranking

Course Schedule

	Topics
AM	**• Effective meeting exercise • Communications models • The meeting as a process**
PM	**• Addressing people issues • Meeting tools: ◊ Information gathering ◊ Decision making • Case study/effective meeting exercise**

Field of Study	Teams
Course Level	Beginning to mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	
Recommended Follow-up Courses	Meeting Facilitation Workshop

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Meeting Facilitation

3 Days

Business Need:

Meetings which follow a clear process lead to improved communications, stronger team dynamics, and increased ability to achieve organizational goals. Facilitators own that process.

Course Description:

This workshop is designed for individuals with an understanding of basic facilitation who want to take their skills to the next level. The key to success for a facilitator is the ability to focus on process so the group can achieve its objectives. Effective facilitators perform a number of tasks, including establishing agendas with clearly identified outcomes; capturing critical discussions, issues, solutions, and action steps; and most importantly, establishing an environment which allows for collaboration, participation, information-sharing, and creative problem-solving.

Working with a small group of fellow facilitators, and led by a highly experienced facilitator/trainer, participants in this workshop will have the chance to hone their skills in a challenging yet safe environment. The workshop examines the process behind planning and implementing effective meetings and off-sites.

Course Objectives:

- Work with team leaders to plan meetings and off-sites
- Identify goals
- Design a practical agenda
- Keep the group on track
- Initiate and maintain a collaborative climate
- Deal with difficult people and resolve conflict
- Increase group participation
- Use information-sharing and decision-making tools
- Use group problem-solving and consensus-building tools
- Help groups generate more creative solutions
- Incorporate multiple perspective to solve problems
- Effectively action-plan, listen and track actions, and increase group member accountability

Meeting Facilitation
3 Days

Course Topics

Facilitator Skills Review
- Skills
- Behaviors
- Addressing barriers to effective facilitation
- The “Facilitator Toolkit”
- 10 rules to live by

Meeting Planning
- Working with the team leader
- Effective agendas
- Identifying goals and objectives
- Room set up and logistics

Group Dynamics
- Stages of group dynamics
- Facilitator role at different stages
- Reinforcing positive behavior
- Addressing negative behavior

Communication Tools and Techniques
- Listening
- Techniques for effective questions
- Capturing the group’s memory
- 7 laws of learning

Information-Gathering Tools
- 3 levels of brainstorming
- Contingency diagrams
- Cause and effect diagrams
- Force field analysis
- 5 Whys

Decision-Making Tools
- 4 levels of decision-making
- Multi-voting
- Nominal group technique
- Pairwise ranking

Course Schedule

Day	Day 1	Day 2	Day 3
AM	• Hope to Gain • ID greatest strength/ weakness as facilitator • Review of basic facilitation skills	• Group dynamics • Reinforcing positive behavior • Addressing negative behavior	• Information-gathering tools • Decision-making tools • Effective meeting closure
PM	• The "attitude difference": 10 facilitator rules to live by • Meeting planning • Kick of a successful meeting	• Communication tools and techniques	• Case study/full group exercise • Action planning and next steps

Field of Study	Teams
Course Level	Mid-level leaders
Credits	
Learning Methods	Case study, discussion, personal reflection, and lecture
Equipment	LCD projector; easel/markers
Suggested Prerequisites	Meeting Management
Recommended Follow-up Courses	Leading Change

Delivery Formats:

This 3-day workshop is best offered entirely in person. However, we customize our delivery to meet your specific requirements and this workshop can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Team Building (facilitated with intact teams)

CI International
achieve long-term success today

Team Building to Improve Employee Engagement
2 Days

Business Need:

Leaders create the environment that motivates employees and allows them to perform at their best. By developing engagement tools and action plans as a team, your leadership group can align on your organization's vision for employee engagement and reinforce each other's efforts.

Course Description:

Your CI International facilitator will analyze your Federal Human Capital Survey and conduct pre-interviews with key leaders in your organization in order to customize this two-day facilitated session to meet the specific needs of your team. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- To understand the drivers of employee engagement, especially from a leadership effectiveness perspective
- To identify the items from your organization's Federal Human Capital Survey (FHCS) which would produce the greatest gains in engagement if scores were improved
- To develop action plans for improving employee engagement and satisfaction
- To identify key messages to report back to employees
- To unite the team under a common purpose so that one voice is heard when communicating key messages

Team Building to Improve Employee Engagement
2 Days

Course Topics

Opening
- Introductions/icebreaker activity
- Objectives and standards for the session
- "Left hand column" activity to encourage open dialogue
- Review of FHCS results

Understanding Engagement
- "Appreciative inquiry" activity to identify motivational factors
- Group discussion to assess current team in terms of engagement
- Characteristics of effective leaders (from the Hay Group)
- Discussion to build two lists: what we do best and where we need to focus attention

Action Planning
- Breakout groups to identify potential barriers
- Report out
- Covey's "circle of concern, influence and control" model to prioritize barriers
- Brainstorming session to identify possible solutions

Closing
- Facilitated group discussion to agree upon the team's top three priorities for action items
- Identification of success measures
- Key messages to report back to employees
- Closing feedback from each participant

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities • Review of FHCS results	• Breakout groups to identify barriers • Brainstorming to identify solutions
PM	• Understanding principles of engagement/effective leadership • Identifying our areas of strength and areas of focus	• Identification of top three priorities and key messages • Action steps and closing activities

Team Building to Improve Employee Engagement

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building for a Team with a New Leader • Team Building: Building Trust Within or Between Teams • Team Building for an Existing Team • Team Building to Enhance Conflict Skills • Team Building for Teams Experiencing Change

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team.   Pre-session assessments such as the Myers-Briggs Type Indicator (MBTI), DISC, or the Thomas-Kilmann Conflict Resolution Instrument (TKI) may also be included.

Team Building for a New Team

2 Days

Business Need:

When organizations throw team members together haphazardly and don't give them the tools they need to function effectively as a team, the group quickly becomes dysfunctional. New teams need time to get to know each other in a business context and align on mission, vision, values, roles, and operating standards.

Course Description:

Your CI International facilitator will conduct pre-interviews with key people in your organization in order to customize this two-day facilitated session to meet the specific needs of your new team. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- Understand the leader's expectations and leadership model
- Identify the strengths and skill sets of each team member
- Identify the team you want and potential barriers to success
- Identify roles and responsibilities of each team member
- Clarify the mission of the team
- Discuss ways to best use the collective expertise and experience of individual team members
- Get to know each other and have fun

Team Building for a New Team

2 Days

Course Topics

Getting to Know Each Other

- Leader introduction
- Objectives and professional guidelines for the session
- “Clock” activity to get to know each other on a personal level
- “Values listening” activity to identify individual values of each team member
- Discussion to identify individual strengths and skill sets

Defining Success

- “Appreciative inquiry” activity to identify ideal team
- Other’s expectations: how do the customer and other stakeholders define success?
- Discussion to develop a common understanding of the mission

Identifying Potential Barriers

- Individuals list potential barriers to the vision for success

Identifying Preventative Measures

- Breakout groups to examine top potential barriers and identify ways to prevent or mitigate them
- Report out of potential action steps
- Clarify individual roles and responsibilities

Closing

- Identify top three priorities
- Identify success measures
- Key messages to report back to employees
- Identify next steps

Course Schedule

Day	Day 1	Day 2
AM	• Getting to know each other activities and discussion	• Identify potential barriers and preventative measures • Discuss and agree on roles and responsibilities
PM	• Getting to know each other (continued) • Defining success: identify the ideal team and the mission	• Identify top three priorities, success measures, key messages, and next steps

Team Building for a New Team

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building: Building Trust Within or Between Teams • Team Building for Teams with New Leader • Team Building for Existing Team • Team Building for Teams Experiencing Change • Team Building to Enhance Conflict Skills • Team Building to Improve Employee Engagement

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team. Pre-session assessments such as the Myers-Briggs Type Indicator (MBTI), DISC, or the Thomas-Kilmann Conflict Resolution Instrument (TKI) may also be included .

Building Trust Within or Between Teams

2 Days

Business Need:

When a team stops functioning effectively the issue often reveals itself to be a lack of trust. Leaders shouldn't wait for lack of trust to become an explicit topic of conversation because that may never happen. Absence of trust is a subtle, creeping phenomenon that may derail your team before anyone notices that it's happening.

Course Description:

Your CI International facilitator may assign Patrick Lencioni's ***Five Dysfunctions of a Team*** as pre-reading for this session. The facilitator will also conduct pre-interviews with each member of the team in order to understand the trust issues and appropriately customize this two-day facilitated session. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- Get to know each other on a more personal level
- Move from a group mentality to a team spirit
- Increase accountability for all team members
- Create a sense of ownership, pride, and confidence to deal with challenges that will be faced by the individuals—and the team
- Identify and agree upon new communication norms for the team
- Improve individual relationships on the team
- Make commitments for improving trust on the team

Building Trust Within or Between Teams

2 Days

Course Topics

Opening

- Objectives and professional guidelines for the session
- "Clock" activity to get to know each other on a personal level
- "Left hand column" activity to encourage honest and open communication
- Individual introductions: greatest takeaways from the pre-reading assignment, and desired outcomes for the session

The Trust Model

- Defining trust
- Trust assessment
- Discussion to process Five Dysfunctions model
- "Skillful discussion" model and the importance of honest debate

Addressing Avoidance of Accountability

- Identify ideal leadership characteristics
- Classify as skill, attitude, or knowledge
- "Johari window" model to identify blind spots
- Feedback activity: what can I do to be more successful with you?
- "Ladder of inference" model to identify baggage that must be left behind

Closing

- Identify perceptions about the session
- Make individual commitments: what will you do differently to increase trust and accountability?

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and discussion	• Identify ideal leadership characteristics • Johari window
PM	• The trust model • Skillful discussion	• Feedback activity and ladder of inference • Closing

Building Trust Within or Between Teams
2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building for Teams with New Leader • Team Building for Existing Team • Team Building for Teams Experiencing Change • Team Building to Enhance Conflict Skills • Team Building to Improve Employee Engagement

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Team Building to Enhance Conflict Skills

2 Days

Business Need:

Teams that become stuck in a storming phase of development may never have the capacity to move forward without getting some help to develop their conflict management skills and improve trust within the team.

Course Description:

Your CI International facilitator will conduct the Thomas-Kilmann or the Kraybill conflict resolution assessment either prior to or during this session. The facilitator will also conduct pre-interviews with each member of the team in order to understand the conflict issues and appropriately customize this two-day facilitated session. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other are as appropriate.

Course Objectives:

- Understand the conflict management styles and preferences of each team member
- Move from a group mentality to a team spirit
- Learn to move relevant information into the open in ways that maintain trust between team members
- Create a sense of ownership, pride, and confidence to deal with challenges that will be faced by the individuals – and the team
- Identify and agree upon new communication norms for the team
- Improve individual relationships on the team
- Make commitments for resolving longstanding conflicts or communicating about “undiscussable” issues

Team Building to Enhance Conflict Skills

2 Days

Course Topics

Opening

- Objectives and professional guidelines for the session
- “Left hand column” activity to encourage honest and open dialogue
- Conflict assessments (may be done prior to the session)
- Individual introductions: my assessment results and desired outcomes for the session

Principles from Crucial Conversations

- Work on me first, us second
- Inquire in ways that make it safe to share
- Advocate in ways that make it safe to respond
- Silence to violence continuum

Skillful Discussion

- The “ladder of inference” and the “skillful discussion” models
- Breakout groups identify team conflicts and practice using skillful discussion
- Report out from breakout groups

Closing

- Identify perceptions about the session
- Discuss ways to modify current approaches to conflict
- Make and share individual commitments: what will you do differently to manage conflict on the team?
- Team action steps for managing specific conflicts

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and introductions • Conflict assessments	• Breakout groups to discuss team conflicts and practice skillful discussion
PM	• Training in the principles from Crucial Conversations • Ladder of inference and skillful discussion	• Closing: individual and team commitments and action steps

Team Building to Enhance Conflict Skills

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building for Teams with a New Leader • Team Building for an Existing Team • Team Building for Teams Experiencing Change • Team Building: Building Trust Within or Between Teams • Team Building to Improve Employee Engagement

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team. A pre-session assessment such as the Thomas-Kilmann Conflict Resolution Instrument (TKI) or the Kraybill assessment is strongly recommended.

Team Building for Teams Experiencing Change

2 Days

Business Need:

Research from the Hay Group has found that 70% of all change initiatives fail, usually due to lack of “people skills.” Teams need tools to adapt to change, and developing those tools as a team makes sense because team members can reinforce each other’s efforts.

Course Description:

Your CI International facilitator may assign pre-reading for this session, and will also conduct pre-interviews with key stakeholders in your organization in order to customize this two-day session to meet the specific needs of your team. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- Understand the dynamics of change and transition
- Learn to manage the emotional component of change, and understand how to reframe change in positive terms
- Identify key messages for the team regarding upcoming changes for the organization
- Unite the team under a common purpose so that one voice is heard when communicating key messages
- Improve internal communication patterns on the team, particularly regarding change
- Get to know each other better and have fun

Team Building for Teams Experiencing Change

2 Days

Course Topics

Opening

- Introductions/icebreaker activity
- Objectives and standards for the session
- “Left hand column” activity to encourage open dialogue
- Identification and discussion of current organizational change issues

Change Models

- Bridges’, Kotter’s, and Mauer’s change models
- “Skillful discussion” model

Planning for Transition

- Breakout groups to discuss issues and practice skillful discussion
- Report out of potential action steps

Closing

- Facilitated group discussion to agree upon the team’s top three priorities for action items
- Identification of success measures
- Key messages to report back to employees
- Closing feedback from each participant

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and discussion	• Identify ideal leadership characteristics • Johari window
PM	• The trust model • Skillful discussion	• Feedback activity and ladder of inference • Closing

Team Building for Teams Experiencing Change

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building for a Team with a New Leader • Team Building: Building Trust Within or Between Teams • Team Building for an Existing Team • Team Building to Enhance Conflict Skills • Team Building to Improve Employee Engagement

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team.   Pre-session assessments such as the Myers-Briggs Type Indicator (MBTI), DISC, or the Thomas-Kilmann Conflict Resolution Instrument (TKI) may also be included.

Team Building for a Team with a New Leader

2 Days

Business Need:

Even a well-oiled team that has reached the performing stage of development can be thrown back to the forming or storming stages by the introduction of a new team leader. CI International's facilitated new leader team building course is designed to help your team power through the change without missing a beat.

Course Description:

Your CI International facilitator will conduct pre-interviews with the new leader and other key people in your organization in order to customize this two-day facilitated session to meet the specific needs of your team. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- Understand the new leader's expectations and leadership model
- Identify the team you want, barriers to success, and solutions to those barriers
- Identify key messages for the team
- Clarify the mission of the team
- Discuss ways to best use the collective expertise of the group and the experience of individual team members
- Debrief past challenges and leave baggage behind
- Get to know each other better and have fun

Team Building for a Team with a New Leader

2 Days

Course Topics

Getting to Know Each Other

- New leader introduction (optional: panel interview of new leader by team members)
- Objectives and professional guidelines for the session
- Individual introductions: what each team member brings to the team
- Group discussion: what we do well (as a team and individually)

Defining Success

- “Appreciative inquiry” activity to identify ideal team
- “Vehicle/map” activity to identify the team we have
- Other’s expectations: how do the customer and the new leader define success?
- Discussion to develop a common understanding of the mission

Identifying Barriers

- Individuals list potential barriers to the vision for success
- Leaving behind” activity to process and close out team baggage

Identifying Solutions

- Breakout groups to examine top priority barriers, analyze causes, and identify potential solutions
- Report out of potential action steps
- Identify roles and responsibilities
- “Dependencies” exercise: what does each team member need from the new leader?

Closing

- Identify top three priorities
- Identify success measures
- Key messages to report back to employees
- Identify next steps

Course Schedule

Day	Day 1	Day 2
AM	• Getting to know each other activities and discussion	• Identify barriers and potential solutions • Leave baggage behind
PM	• Defining success: the team we have, the team we want, and a common understanding of the mission	• Identify top three priorities, success measures, key messages, and next steps

Team Building for a Team with a New Leader

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building: Building Trust Within or Between Teams • Team Building for Teams Experiencing Change • Team Building to Enhance Conflict Skills • Team Building to Improve Employee Engagement

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team. Pre-session assessments such as the Myers-Briggs Type Indicator (MBTI), DISC or the Thomas-Kilmann Conflict Resolution Instrument (TKI) may also be included.

Team Building for an Existing Team
2 Days

Business Need:

High performance teams have clear goals, strong relationships, and effective communication. CI International's facilitated team building sessions are designed to help your team strengthen in each of these areas and elevate performance, especially through the use of effective communication tools.

Course Description:

Your CI International facilitator will conduct pre-interviews with key leaders in your organization in order to customize this two-day facilitated session to meet the specific needs of your team. The following objectives, activities, and topics are offered only as examples. During the session, your facilitator will also offer individual feedback to team members about their participation, communication skills, and other areas as appropriate.

Course Objectives:

- Identify the team you want and guidelines/operating standards/norms to get there
- Identify key messages for the team
- Unite the team under a common purpose so that one voice is heard when communicating key messages
- Discuss ways to best use the collective expertise and experience of individual team members
- Improve internal communication patterns on the team
- Clarify leadership roles and develop a common understanding of leadership
- Get to know each other better and have fun

Team Building for an Existing Team
2 Days

Course Topics

Getting to Know Each Other Opening
- Introductions/icebreaker activity
- Objectives and standards for the session
- "Left hand column" activity to encourage open dialogue
- Discussion: characteristics of great teams
- "Vehicle/map" activity to assess the current state of the team

Defining Success
- Breakout groups to define success from different perspectives
- Report out

Identifying Barriers
- Individuals list potential barriers to the vision for success
- Stephen Covey's "circle of concern, control, and influence" model: use to prioritize barriers

Identifying Solutions
- Breakout groups to examine top priority barriers, analyze causes, and identify potential solutions
- Report out of potential action steps

Closing
- Facilitated group discussion to agree upon the team's top three priorities for action items
- Identify success measures
- Key messages to report back to employees
- Closing feedback from each participant

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and discussions • Breakout groups to define success for the team	• Breakout groups to examine barriers and identify solutions
PM	• Report out from breakout groups • Identify barriers	• Report out from breakout groups • Top three priorities, success measures, action steps, and closing activities

Team Building for an Existing Team

2 Days

Field of Study	Facilitated Team Building
Course Level	
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	• Team Building for a Team with a New Leader • Team Building: Building Trust Within or Between Teams • Team Building for Teams Experiencing Change • Team Building to Enhance Conflict Skills • Team Building to Improve Employee Engagement

Delivery Formats:

We customize our delivery to meet your specific requirements. We recommend a two-day session but depending on your objectives this session can range from one day to five. We recommend that clients contract for our facilitator to conduct team member interviews prior to the session in order to assess the needs and dynamics of your team. Pre-session assessments such as the Myers-Briggs Type Indicator (MBTI), DISC, or the Thomas-Kilmann Conflict Resolution Instrument (TKI) may also be included.

Change Management

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Change Management for Leaders

2 Days

Business Need:

Leaders of organizations and teams have a choice; they can simply let the tide of change sweep them along to an uncertain outcome, or they can grow through change with intention and purpose. The latter path helps to ensure that the change initiative is firmly anchored in the organization's culture, and that employees are focused and engaged. CI International's Change Management for Leaders provides the tools and support leaders need to achieve a fully successful change initiative.

Course Description:

This workshop is designed for up to twenty leaders and will present best practices for leading and guiding change, models for understanding the psychological aspects of change, and pitfalls to watch for in change efforts. The training will also demonstrate how a clear and elevating picture of the future and a compelling reason to become part of that future are two critical elements of helping members of an organization process through the transition period associated with change. Finally, a change management action plan for each leader and for the leader's team will be produced.

Course Objectives:

- Demonstrate the importance of change management as a key leadership skill
- Show why many strategic changes fall short of expectations
- Understand the nature of change and current successful change models for organizations
- Learn to recognize the signs and symptoms of the stages of transition
- Develop a leadership model for successful transition management including specific leadership skills, behaviors, roles, and responsibilities
- Develop individualized messages for change for each participant
- Develop a change management action plan to use with the leaders' work units based on an assessment of change readiness of the team and the organization
- Recognize different types of resistance encountered in change efforts and how to engage employees to overcome barriers
- Begin the process of identifying issues that the participant must ultimately process in order to move ahead

Change Management for Leaders

2 Days

Course Topics

Understanding Change

- Leadership and change
- Characteristics of effective teams

Establishing the Foundation For Change

- "Appreciative inquiry" activity to identify what will NOT change

Communicating the Need for Change

- Listening skills
- Skillful discussion
- Establishing a sense of urgency

Moving Beyond Resistance

- Levels of resistance
- Strategies to address resistance
- Turning resistance into support

Application of Change Models

- Kotter 8-step change model
- Bridges transition model
- Maurer 5-step change model
- Making it real: applying models to change efforts

Leadership and Change

- Creating the environment to maintain on-going change

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and discussions • Stages of personal change • Appreciative inquiry • Hearing from employees: listening skills	• Case study • Understanding motivation for change in self and others • Application of change models to current change efforts
PM	• Sources of resistance • Levels of resistance • Turning resistance into support	• Building a motivating culture • Leading in the new environment

Change Management for Leaders

2 Days

Field of Study	Change Management
Course Level	Mid-level and senior leaders
Credits	
Learning Methods	Facilitated large and small group discussion, indoor activities
Equipment	LCD Projector; easels with paper
Suggested Prerequisites	
Recommended Follow-up Courses	

Delivery Formats:

This two day workshop can be offered in an abbreviated method of two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Change Management for Employees
1 Day

Business Need:

Individuals and organizations have a choice; they can simply survive organizational change or, with the right training and support, they can grow through change. Individuals can go through change and feel powerless, or they can go through change and learn to be more powerful. This workshop provides participants with the opportunity for growth and personal empowerment.

Course Description:

One of the ways to ensure engagement and involvement is to remove as much of the mystery surrounding the change as possible. An understanding of change models and how change impacts people and organizations will help individuals make sense of confusing times. It allows people to be more patient and not feel overwhelmed by the change. Further, employees who understand and can deal with the inevitable stress associated with large change efforts are far more likely to remain productive and focused. This one-day workshop is focused on understanding – of change models, of how change effects people, of the sources of resistance, how to let go of issues and finally of how to stay productive in the midst of rapid change.

Course Objectives:

- Understand transition models and how to recognize where you and the organization are in the change effort
- Understand resistance - recognize that responding to, reacting to, and resisting change are normal
- Gain insight from lessons learned in other transitions
- Recognize signs of stress in yourself and others and learn how to respond appropriately to that stress
- Understand the business model for change—drivers, objectives, and sense of urgency

Change Management for Employees

1 Day

Course Topics

Reflection

- What can we bring from our past experience to apply to the current situation?

Change and transition

- Examine a model about dealing with change
- Understand the impact of “transition” on both organizations and individuals
- Learn to take advantage of transitions to move forward

Listening

- The 3 levels of listening, and the appropriate time to use each
- Understand how listening effectively can make one more influential

Sources of resistance to change

- All resistance is not the same; nor should the response be the same
- Understand our own resistance to change and how to manage it

Staying in control

- Examine tools for feeling in control in the midst of change

Managing stress

- Change naturally brings about stress
- Managing stress is necessary to be successful in dealing with change

Action planning

Course Schedule

	Topics
AM	• Reflection • Dealing with transitions • Listening skills • Sources of resistance
PM	• Sources of resistance (cont) • Staying in control • Managing stress • Action planning

Change Management for Employees

1 Day

Field of Study	Change Management
Course Level	Beginner to Intermediate
Credits	
Learning Methods	Interactive Discussion Classroom exercises
Equipment	LCD Projector and Screen
Suggested Prerequisites	None
Recommended Follow-up Courses	

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Telework

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Making Telework Work for You and Your Organization

½ Day

Business Need:

Much of the challenge associated with a transition to telework is a perfectly understandable fear of the unknown. Many managers and employees feel they are successful in the current environment. They may intellectually understand the advantage of telework, but moving from a successful “known” to a potentially better “unknown” is still a challenge.

Course Description:

This action learning workshop gives both managers and employees the knowledge, skills, tools, and confidence to make your telework program a success. If possible, intact teams making the transition to telework should attend the session together so they can build a common understanding and mutual support for the shift to telework. Participants will leave with action plans under each objective and with practical tools they can start to employ the day after the workshop.

Course Objectives:

- Identify the benefits and challenges of telework
- Understand the importance of performance management in making telework successful
- Learn to stay visible, responsive, and connected in a telework environment
- Establish effective communication strategies for telework

Making Telework Work for You and Your Organization

½ Day

Course Topics

Telework and Productivity

- Identify your goals for this workshop
- Understand the risks and concerns employees and managers have about telework
- Identify the characteristics of effective teams and compare those characteristics in virtual and co-located teams

Performance Management

- Understand the difference between activities and results
- Components of providing clear direction: goal, guidelines, resources, communication, consequences

Keeping Lines of Communication Open

- Discuss technological options for communication in your agency
- Identify communication preferences
- Write a communication plan
- Use "situation-action-result" to write an accomplishment report

Staying Visible

- Share best practices to stay visible to the team
- Common mistakes
- Action plan

Being Responsive

- Why it's important
- Set standards for responsiveness

Field of Study	Telework
Course Level	Beginner
Credits	
Learning Methods	Interactive discussion Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Conducting Virtual Meetings • Leading in a Telework Environment (for supervisors)

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Leading in a Telework Environment

1 Day

Business Need:

In order to take full advantage of teleworking, organizations need supervisors who can effectively create, manage, and lead telework teams. Much of the emphasis on creating telework programs has been on technology issues, particularly regarding connectivity and security of government information. However, a recent survey of federal chief information security officers showed that telework programs are not a security threat and do not hamper agencies' ability to meet Federal Information Security Management Act (FISMA) mandates. The challenge, then, comes down to leadership.

Course Description:

Many front-line leaders are anxious and uncertain about telework programs, fearing loss of control over employees' daily work and lacking trust in their subordinates' ability to work without direct supervision. This workshop will focus on building the leadership skills, trust, and confidence to manage a successful telework program. There will also be time set aside to address some of the administrative/logistics issues that could potentially impact teleworking. Particular emphasis will be placed on allowing managers to voice their concerns and providing sound strategies and approaches to address those concerns.

Course Objectives:

- Gain tools to more effectively lead in a telework environment
- Raise "hot button" concerns managers have regarding telework and identify strategies to resolve telework problems
- Learn the four best practices of successful telework and how to apply them as a manager
- Establish effective communication protocols and strategies
- Learn to give and receive effective long distance feedback and plan/manage effective virtual meetings

Leading in a Telework Environment

1 Day

Course Topics

Telework and Productivity Assessment

- Identify your current perceptions and concerns about telework
- Assessment of your current team's mobile work culture
- Identify the characteristics of effective teams and compare those characteristics in virtual and co-located teams

Performance Management

- Understand the difference between activities and results
- How to set results-focused goals
- Components of an effective delegation model: goal, guidelines, resources, communication, consequences

Keeping Lines of Communication Open

- Discuss technological options for communication in your agency
- Write a communications plan including norms, expectations, and protocols
- Accomplishment reports using "situation-action-result"
- Giving and receiving feedback
- Planning and conducting virtual meetings

Staying Visible

- Best practices for both managers and employees
- Action plans

Being Responsive

- Why it's important
- Setting norms and protocols for responsiveness

Wrap-up

- Case study and challenges discussion
- Tips for success
- Action plans

Course Schedule

	Topics
AM	• Assessment • Performance management • Keeping lines of communication open
PM	• Keeping lines of communication open (continued) • Staying visible • Being responsive • Wrap-up

Field of Study	Telework
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Conducting Virtual Meetings

Delivery Formats:

We recommend a full-day in-person session, but options include a half-day or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Conducting Effective Virtual Meetings
½ Day

Business Need:
Effective and efficient meetings are an essential part of an effective and efficient organization. It's now common for members of teams to be spread across many geographic boundaries, or to be teleworking on a regular basis. Business must continue and teams need to stay connected. Virtual meetings and web conferences are more common today than ever, and both managers and employees need to understand how to keep participants engaged and how to use the technology effectively.

Course Description:
This workshop provides practical tools and skills for planning, leading, and participating in a virtual meeting. Workshop participants will gain insight into how to maximize meeting software and tap the collective wisdom of the group to gather data, make decisions, and develop effective action plans to make the decisions reached in the meeting a reality.

Course Objectives:
- Collect ideas for successfully planning a virtual meeting
- Learn how to run an effective meeting using meeting technology
- Develop techniques to increase group participation

Conducting Effective Virtual Meetings
½ Day

Course Topics

Identifying Best and Worse Practices
- Identify your goals for this workshop
- What makes virtual meetings ineffective?
- Identify your pet peeves
- Identify the components of an effective virtual meeting

Meeting Planning
- The meeting planning checklist
- Decision-making methods
- Creating and using an agenda
- Identifying roles for the meeting
- Setting ground rules
- Meeting flow

Group Dynamics
- Tips for keeping participants engaged

Conducting the Meeting
- Using online tools such as chat and white board
- Eliminating distractions
- Using technology: video camera, web meetings, blended meetings
- Ending the meeting

Follow-up
- Meeting notes, action items

Field of Study	Telework
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises, Video
Equipment	Projector and screen, and audio speakers, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Making Telework Work for You and Your Organization • Leading in a Telework Environment (for supervisors)

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Performance Management

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Performance Management: Setting Goals

½ Day

Business Need:

Performance planning means setting goals and expectations and determining what needs to be done to reach those goals. Goal setting is the bedrock of the performance management process because it gives people direction and focus, allows them to regulate their efforts appropriately, and increases their persistence in achieving their goals.

Course Description:

This interactive workshop provides the tools supervisors need to write effective performance standards, create quantitative or qualitative measures for them, and communicate expectations through skillful, effective dialogue with the employee

Course Objectives:

- Learn to establish challenging yet attainable performance goals
- Learn how to craft measurable expectations, even for qualitative elements
- Communicate organizational goals and connect them with performance expectations
- Solicit employee input on goals for the upcoming appraisal period
- Learn to create a common understanding and resolve any disputes through effective use of a communications model

Performance Management: Setting Goals

½ Day

Course Topics

Performance Planning

- Assess your current plan
- How to use the SMART model to write effective performance standards
- Using action verbs in your standards

Measures

- Criteria for quantitative measures
- How to write effective qualitative (behavior-based) measures

Reviewing/Assessing Your Standards

- Activities versus outcome
- Defining words like “always,” “sometimes,” and “never”
- Re-write your current standards

Communication Skills for Setting Expectations

- Use the Ladder of Inference and Skillful Discussion to create a dialogue that leads to shared understanding

Documentation

- Tips for keeping performance folders
- Using accomplishment reports

Field of Study	Performance Management
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Giving Feedback • Conducting Performance Appraisals • Writing Self-assessments • Rewards and Recognition • Addressing Underperformance

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Performance Management: Ongoing Feedback & Communications

½ Day

Business Need:

Whether we recognize it or not, we are constantly providing and receiving feedback. How we provide or receive that feedback will often spell the difference between success and failure.

Course Description:

Participants in this workshop will develop communication skills for improving dialogue about performance through active listening and balancing advocacy and inquiry. They will learn and practice a six-step process for giving feedback, and will also learn to receive feedback in a constructive manner.

Course Objectives:

- Learn to communicate performance feedback through the model of Skillful Discussion:
  - ◊ Balance advocacy and inquiry
  - ◊ Identify barriers to effective listening and increase listening power
  - ◊ Provide necessary information and resources for improved performance
  - ◊ Speak so others will listen
- Learn to use a consistent six-step feedback model to communicate observations and conclusions about employee performance and achieve agreement with the employee
- Develop a plan of action for improved performance involving both the supervisor and the employee
- Learn the power of positive feedback in improving performance

Performance Management: Ongoing Feedback & Communications

½ Day

Course Topics

Communication Skills

- The case for active listening
- False listening and how to recognize the signs
- Listening on three levels
- The Ladder of Inference and how our assumptions affect our listening ability
- Skillful Discussion and the Johari Window: balancing advocacy and inquiry to bring relevant information into the open

Giving and Receiving Feedback

- The emotional impact of positive and negative feedback
- Tips for giving effective constructive feedback
- Tips for receiving feedback
- A six-step process for giving feedback
- Practice activity

Field of Study	Performance Management
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	• Setting Goals
Recommended Follow-up Courses	• Conducting Performance Appraisals • Writing Self-assessments • Rewards and Recognition • Addressing Underperformance

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Performance Management: Writing Self-assessments

½ Day

Business Need:

An effective performance management process is one in which the employee participates fully. By learning to write effective self-assessments, employees can promote their own growth and development and assist supervisors in evaluating and improving performance.

Course Description:

This workshop is for anyone, employee or supervisor, who wants to develop tools for assessing their own performance and reporting accomplishments. Participants will review examples of effective self-assessments and will practice writing their own and receiving feedback about them.

Course Objectives:

- Learn the benefits of writing effective self-assessments
- Learn to be an active participant in the performance management process
- Begin writing your own self-assessments using the “Situation-Action-Result” model
- Receive feedback on the quality of your self-assessments

Performance Management: Writing Self-assessments

½ Day

Course Topics

Performance Management Overview

- The importance of goal setting
- Stages in the performance management process
- Responsibilities of the employee
- Responsibilities of the rating supervisor
- Responsibilities of the reviewing official

Writing Self-assessments

- Identifying specific accomplishments and describing them effectively
- Linking accomplishments to objectives and making the case for why they mattered by using the Situation-Action-Result model
- Examples of topics to include
- Sample write-ups
- Practice activity with peer feedback

Field of Study	Performance Management
Course Level	Beginner to Mid-Level Leader
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Setting Goals • Giving Feedback

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Addressing Under-Performance

½ Day

Business Need:

Addressing underperformance is one of the most critical and yet most neglected of supervisory responsibilities. There are many reasons why supervisors don't address underperformance; this workshop will ensure that a lack of skill and knowledge is not one of those reasons.

Course Description:

Supervisors attending this workshop will learn to distinguish between misconduct and underperformance, and will analyze possible causes of performance problems. They will build tools for giving feedback, effectively delegating tasks, and documenting underperformance.

Course Objectives:

- Understand the importance of determining the cause of underperformance
- Learn to distinguish between misconduct and under performance
- Learn steps for providing and receiving effective feedback
- Effectively use a delegation model for assigning tasks
- Review guidelines for documentation
- Understand when and how to rely on HR for support

Addressing Under-Performance

½ Day

Course Topics

Causes of Underperformance

- Examining causes of underperformance within the employee and within the environment, including lack of resources, lack of motivation or appropriate incentives, and policy or procedure issues

Misconduct vs. Underperformance

- Won't vs. can't
- Examples of misconduct and underperformance
- Corrective action for each
- Documentation guidelines
- Using HR support appropriately

Giving Effective Feedback

- The Johari Window: addressing an employee's blind spots about performance
- Steps in the feedback model, and tips for delivering feedback effectively
- Tips for receiving feedback

Delegation as a Tool for Performance Improvement

- Setting results-focused goals
- Steps for effective delegation: goal, guidelines, resources, communication, consequences
- Activity: delegation role play

Field of Study	Performance Management
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	• Setting Goals • Giving Feedback • Conducting Performance Appraisals
Recommended Follow-up Courses	• Writing Self-assessments • Rewards and Recognition

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Performance Management: Rewards and Recognition
½ Day

Business Need:

Supervisors often focus on extrinsic rewards when trying to motivate employees, such as extra time off, awards, cash, etc. But for most of us, intrinsic rewards such as a feeling of purpose, meaning, accomplishment, or competence are what actually motivate us on the job. Supervisors need to learn that employees are motivated by the same intrinsic elements they themselves are motivated by.

Course Description:

Participants in this workshop will learn how motivational theories such as Maslow's Hierarchy of Needs and Herzberg's Two-factor Theory apply to rewards and recognition. They will explore options for creating personalized recognition programs, and learn a model for increasing employee empowerment through effective delegation.

Course Objectives:

- Understand the difference between extrinsic and intrinsic motivation
- Identify what motivates you and your employees at work
- Apply Maslow and Herzberg's theories to employee motivation
- Identify personalized recognition options for your employees
- Learn to use effective delegation as a tool to increase trust and empower your employees

Performance Management: Rewards and Recognition

½ Day

Course Topics

Motivation

- What motivates you and your employees?
- Motivation survey results
- Maslow's Hierarchy of Needs
- Herzberg's Two-factor Theory: motivational factors and hygiene factors

Rewards and Recognition

- Recognition that works: praise, thanks, opportunity, respect
- Recognition self-survey
- How to deliver personalized recognition

Delegation as a Tool for Empowerment

- Building trust through delegation
- Steps for effective delegation: goal, guidelines, resources, communication, consequences
- Activity: delegation role play

Field of Study	Performance Management
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	None
Recommended Follow-up Courses	• Setting Goals • Giving Feedback • Conducting Performance Appraisals • Writing Self-assessments • Addressing Underperformance

Delivery Formats:

We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Performance Management: Conducting Performance Appraisals

½ Day

Business Need:

Performance management is the process of evaluating how well employees do their jobs compared with a set of standards, and then communicating that information to the employees. Supervisors must have tools for the job.

Course Description:

Participants in this interactive workshop will revisit the communication skills learned in the Giving Feedback workshop and learn to apply them throughout the steps of conducting an appraisal meeting. They will also learn documentation guidelines to help facilitate the appraisal process.

Course Objectives:

- Learn the importance of data to the appraisal process and learn how to keep performance folders
- Implement weekly emails to track accomplishments
- Improve the accuracy of the appraisal process by becoming aware of common rater errors
- Learn to skillfully handle tough questions and objections from the employee
- Revisit and practice tools for giving effective feedback in the context of an appraisal meeting

Performance Management:
Conducting Performance Appraisals
½ Day

Course Topics

Performance Management
- What is performance management?
- Steps in the process: planning, monitoring, developing, rating, rewarding

Documentation
- Guidelines for keeping performance folders
- Weekly accomplishment report emails

Conducting Performance Reviews
- Common rater errors
- Guidelines for preparation
- Steps for conducting the review meeting
- Handling tough questions and objections from the employee
- Practice activity: feedback triads

Field of Study	Performance Management
Course Level	Beginner to intermediate
Credits	
Learning Methods	Interactive discussion, Classroom exercises
Equipment	Projector and screen, Flipchart and markers
Suggested Prerequisites	• Setting Goals • Giving Feedback
Recommended Follow-up Courses	• Writing Self-assessments • Rewards and Recognition • Addressing Underperformance

Delivery Formats:
We recommend a four-hour in-person session or a two-hour online session. We also offer an option for a follow-up one-hour online coaching session. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Diversity and Inclusion

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Diversity and Inclusion: Introduction to Diversity

e-Learning Module

Business Need:

This short, self-paced e-learning module will assist your organization in establishing a baseline of understanding in introductory diversity concepts for all employees.

Course Description:

Participants will learn what diversity means, how various diversity dimensions can matter in the workplace, and why diversity is important to business success. More importantly, they will learn to view diversity as something to be valued, sought after, and leveraged, rather than just tolerated.

Course Objectives:

- Create a baseline of understanding in basic diversity concepts
- Make the case for why diversity is important to the agency
- Develop a common definition of diversity
- Raise awareness for what culture consists of and how it influences workplace behaviors and business effectiveness
- Develop a personal action plan for supporting diversity initiatives in the agency

Diversity and Inclusion: Introduction to Diversity
e-Learning Module

Course Topics

Overview
- Why is diversity important?
- Diversity awareness
- The business case for diversity

Role of Culture
- What is culture?
- The framework of culture
- Cultural context

Key Concepts
- Understanding diversity
- Understanding frame of reference
- The diversity wheel (dimensions of diversity)

Diversity as an Asset
- Benefits of diversity
- Promoting diversity
- Personal action plans

Field of Study	Diversity and Inclusion
Course Level	Introductory
Credits	
Learning Methods	Self-paced online learning module
Equipment	Computer for each participant
Suggested Prerequisites	None
Recommended Follow-up Courses	• Creating a Culture of Inclusion • Micro-messaging • Examining Individual and Cultural Bias • Communicating Across the Generations • Diversity on Stage

Delivery Formats:
This is a self-paced e-module.

Diversity and Inclusion: Creating a Culture of Inclusion

1 Day

Business Need:

Employee engagement depends upon the organization’s ability to foster a culture of inclusion. Creating an inclusive environment allows us to take advantage of different points of view, leverage the power of difference, and sustain a workplace where everyone can contribute to his or her fullest potential.

Course Description:

This workshop helps employees understand what diversity and inclusion are and why they are critical to accomplishing the mission. Participants will be introduced to concepts that allow them to explore their own unconscious biases and how they show up in workplace behaviors. They will develop a working definition of diversity and how it applies to the organization, examine the language of diversity, and suggest ways to be more inclusive in communication. Participants will also develop a personal action plan.

Course Objectives:

- Identify changes in the workplace and how they impact us
- Analyze how your socialization influences your interpersonal skills and behavior at work
- Learn how to avoid inappropriate stereotypes that can create a culture of exclusion
- Learn how to respond appropriately to diversity-influenced situations and challenges
- Understand the components of cultural intelligence and how they can help us create a culture of inclusion
- Develop a communications plan that supports a culture of inclusion

Diversity and Inclusion: Creating a Culture of Inclusion

1 Day

Course Topics

The Business Case

- Examining the trends that impact your agency, including demographic, technological, legislative, competitive, and trends related to organizational change and stakeholder expectations

Terminology and Definitions

- Diversity
- Inclusion
- Workforce and marketplace diversity
- Valuing, managing, and leveraging diversity

Socialization

- What is culture?
- Sources of socialization
- The components of cultural intelligence: drive, knowledge, strategy, action
- The tolerance scale

Strategies for Inclusive Communication

- Breakout groups to discuss ways to become an advocate for inclusiveness
- Guidelines for use of specific language to promote inclusion
- Personal action plans

Course Schedule

	Topics
AM	• Making the Business Case • The role of leaders in creating culture
PM	• How socialization drives behavior • Tolerance scale exercise • Strategies for moving forward

Diversity and Inclusion: Creating a Culture of Inclusion
1 Day

Field of Study	Diversity and Inclusion
Course Level	Introductory
Credits	
Learning Methods	Full day interactive instructor-led workshop, or two-hour webinar
Equipment	Projector and screen for workshop
Suggested Prerequisites	None
Recommended Follow-up Courses	• Micro-messaging • Examining Individual and Cultural Bias • Communicating Across the Generations • Diversity On Stage

Delivery Formats:

We recommend a full day instructor-led workshop or 2 two-hour webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Diversity and Inclusion: Micro-messaging

½ Day Workshop

Business Need:

The term micro-inequity was coined by MIT professor Dr. Mary Rowe, who used it to describe a pattern of negative, devaluing, and often semi-conscious messages sent from one person to another. There is a growing concern about the impact of micro-inequities on employee morale and productivity in the workplace. Micro-inequities inflict damage on a person's self-esteem, confidence, and performance. Once people lose their ability to be confident, they tend to lose the ability to do their best work.

Course Description:

Participants in this workshop will learn what micro-messages are composed of and how they form patterns that can become micro-inequities or micro-affirmations. Through examples and breakout group discussions, they will learn the potential impacts of micro-inequities and micro-affirmations on workplace relationships and performance, and develop strategies for becoming more aware of micro-messages in order to manage those impacts.

Course Objectives:

- Understand what micro-messages are and how they impact our communication patterns and relationships in the workplace
- Increase awareness of micro-inequities at work
- Develop and practice skills to help minimize the impact of micro-inequities in the workplace

Diversity and Inclusion: Micro-messaging

½ Day Workshop

Course Topics

Diversity Basics

- Common terms and definitions
- Agency diversity and inclusion initiative: what's working and what's not?
- Understanding what micro-messages, micro-inequities, and micro-affirmations are

Why Does it Matter?

- The impact on individual confidence and performance
- The impact on agency recruitment, selection, and retention programs

Tools for Eliminating Barriers

- The diversity wheel
- The ladder of inference
- Reward and recognition as micro-affirmations

Strategies

- Group discussion to identify ways to minimize micro-inequities and maximize micro-affirmations
- Personal action plans

Field of Study	Diversity and Inclusion
Course Level	
Credits	
Learning Methods	Group discussions, exercises, and role play
Equipment	Projector and screen for workshop
Suggested Prerequisites	Creating a Culture of Inclusion
Recommended Follow-up Courses	• Communicating Across the Generation Gap • Examining Individual and Cultural Bias • Diversity on Stage

Delivery Formats:

We recommend a half-day instructor-led workshop or a two-hour webinar. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Diversity and Inclusion: Examining Individual & Cultural Bias

1 Day Workshop

Business Need:

High performance teams use their differences to be more creative, make better decisions, and stay relevant and flexible. This requires an awareness of where biases come from, how to identify them, and how to manage them.

Course Description:

Participants will examine how each individual approaches a given situation with many different life experiences, values, long-held biases, and perhaps prejudices that need to be checked. These biases can impact workplace behavior in ways that may create unintentional conflict and negatively affect performance.

Course Objectives:

- Understand the origins of unconscious bias
- Examine different types of bias and stereotyping
- Learn and practice tools for managing unconscious bias
- Determine appropriate reactions/responses to diversity issues

Diversity and Inclusion:
Examining Individual & Cultural Bias

1 Day Workshop

Course Topics

Understanding the Terminology

- Individual bias
- Cultural bias
- Implicit stereotype
- Explicit stereotype
- Unconscious bias

Understanding the Origins of Bias

- Framework of culture
- Frame of reference
- What's in your "bag," and how did it get there?
- The ladder of inference

The Tolerance Scale

- Rating our attitudes toward difference: appreciation, acceptance, tolerance, avoidance, repulsion

The Impact of Bias

- Individual impact: recruitment, hiring decisions, mentoring, training, promotional decisions, performance reviews
- Organizational impact

Strategies

- Use the Implicit Association Test (IAT) to create awareness
- Encourage discussion

Course Schedule

	Topics
AM	• Understanding bias • Socialization
PM	• Tolerance scale • Organizational impact of bias • Implicit Association Test • Next steps; moving forward

Diversity and Inclusion: Examining Individual & Cultural Bias
1 Day Workshop

Field of Study	Diversity and Inclusion
Course Level	
Credits	
Learning Methods	Half day interactive instructor-led workshop, or two-hour webinar
Equipment	Projector and screen for workshop
Suggested Prerequisites	Creating a Culture of Inclusion
Recommended Follow-up Courses	• Micro-messaging • Communicating Across the Generations • Diversity on Stage

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Communicating Across the Generations
½ Day Workshop

Business Need:

Generational difference is a powerful framework for discussing what binds some individuals together in the workplace and what drives others apart. This workshop gives participants an understanding of the shaping influences, values, and behaviors of different generations and provides strategies for communicating across potential barriers.

Course Description:

Participants in this workshop will examine the Traditionalist, Baby Boomer, Generation X, and Millennial generations, discussing the major events that shaped them and identifying ways in which their values show up in the workplace. Then the discussion will turn to how best to improve communication by identifying, understanding, and meeting each generation's communication preferences.

Course Objectives:

- Understand the distinct characteristics of each generation, the influences which helped to create their values, and the likely impacts on workplace behaviors
- Identify generational communication preferences and obstacles
- Develop strategies to address communication obstacles for each generation

Communicating Across the Generations
½ Day Workshop

Course Topics

Diversity Basics
- Common terms and definitions
- Understanding frame of reference
- The diversity wheel

Defining the Generations
- Traditionalists: central influences, characteristics, and values
- Baby Boomers: central influences, characteristics, and values
- Generation X: central influences, characteristics, and values
- Millennials: central influences, characteristics, and values

Generational Perceptions
- Group discussion of generational stereotypes, especially for the Millennials
- Group discussion of the benefits of having a multi-generational perspective in the workplace

Strategies
- Communication preferences for each generation, including technology
- Identification of best practices for communicating with each generation
- General best practices
- Personal action plans

Field of Study	Diversity and Inclusion
Course Level	
Credits	
Learning Methods	Half day interactive instructor-led workshop, or two-hour webinar
Equipment	Projector and screen for workshop
Suggested Prerequisites	Creating a Culture of Inclusion
Recommended Follow-up Courses	• Micro-messaging • Communicating Across the Generations • Diversity on Stage

Delivery Formats:

We recommend a half-day instructor-led workshop or a two-hour webinar. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Diversity and Inclusion: Diversity on Stage
½ Day Workshop

Business Need:
Diversity on Stage provides an engaging new venue for extending your agency's diversity and inclusion mission and messages. These two-to three-hour sessions provide an opportunity to focus the dialogue on a broad range of diversity issues relevant to your organization, stimulate discussion about them, and build diversity and inclusion skills and knowledge throughout the agency. This is a fun, experiential, and interactive way to jump-start or re-energize your diversity awareness efforts.

Course Description:
CI International, in consultation with our clients, creates a set of scripts to illustrate common diversity issues and challenges in your organization. Then we bring in professional actors to deliver a performance, using experienced CI International facilitators to lead discussion and debrief of each scene. Scenes are re-played after each group discussion to illustrate a preferred approach to the issue that supports agency values.

Course Objectives:
- To illustrate, examine, and discuss real-world diversity situations from your workplace, workforce, and the public you serve
- To provide facilitated discussion of challenges and opportunities that occur around difference, and encourage behaviors that reinforce the agency's diversity and inclusion objectives and policies
- To encourage employees to speak for diversity
- To provide tools for better communication and teamwork in situations influenced by diversity
- To increase awareness of your organization's diversity and inclusion initiatives and encourage dialogue about your diversity strategy
- To identify actions each employee can take to further your diversity efforts

Diversity and Inclusion: Diversity on Stage

½ Day Workshop

Sample Topics/Scenes

- A group of employees struggle with a dimension of diversity that makes them uncomfortable due to their own personal beliefs, e.g. Islamism or sexual orientation. A manager must counsel them on appropriate behavior and/or support of agency programs.

- A group of employees planning a new agency initiative inadvertently create a culture of exclusion by failing to consider the needs of a group, e.g. accessibility considerations for disabled employees, or religious observance needs.

- An interview panel misses opportunities to cast a wider net in the recruitment and selection process because they have not examined their selection criteria for unintended bias.

- A team derails and misses an important deadline because of miscommunication caused by behavioral style differences. MBTI, DISC, or any other personality or behavioral style model may be used for debrief and discussion.

Field of Study	Diversity and Inclusion
Course Level	Introductory (this can also be mid-level learning as a refresher or to take a deeper dive into diversity after an introductory course)
Credits	
Learning Methods	Theater-style presentations followed by large or small group facilitated discussion
Equipment	A stage or open area with table group seating. LCD projector and screen.
Suggested Prerequisites	None
Recommended Follow-up Courses	• Creating a Culture of Inclusion • Micro-messaging • Examining Individual and Cultural Bias • Communication Across the Generations

Delivery Formats:

This half day workshop is best offered entirely in person due to the interactive nature of the content and delivery. It can be combined with one of our other diversity offerings in either a hybrid delivery or a full day of in-person training.

Customer Service

CI International
achieve long-term success today

CARE Customer Service Workshop
1 Day

Business Need:

Providing high-quality and consistent customer service is the key to organizational success because quality service promotes customer satisfaction, which in turn supports business revenue. The most valuable assets an organization has are its customers. Good customer service is more than giving the customer what they need. It is about the kind of relationship you create with the customer that keeps them coming back, or taking their business elsewhere.

Course Description:

Participants in this workshop will learn the CARE customer service model and how to apply that model to providing quality customer service. Participants will use their experience in serving customers as well as their experience in being served as a customer. Those experiences will help participants explore approaches to customer service-those that work well, plus those to avoid.

Course Objectives:

- Learn communication tools and techniques to meet customer needs
- Develop a deeper understanding and empathy of the challenges and issues facing customers in order to serve their needs
- Develop skills to meet customer expectations
- Learn service management strategies, including how to turn “difficult” customers into partners
- Learn partnering and negotiating tools and techniques in order to understand and respond quickly to customer needs
- Learn time management tools and techniques
- Understand the cost and benefit of customer service

CARE Customer Service Workshop

1 Day

Course Topics

CARE Model of Customer Service

- Learn the core components of customer service

Listening

- Understand how good listening is a core component of outstanding customer service
- Identify the levels of listening
- Conduct strength-building activities to increase listening skills

Increase Awareness to Improve Effectiveness

- Use mental models to manage our natural inclination to make assumptions and draw conclusions
- Balance advocacy with inquiry to generate quality discussion

Establish Accountability and Credibility with Clients

- Action tips for dealing with difficult people, complaints, aggression, and other common customer service problems
- Conduct exercises to increase discussion skills
- Role-play difficult client scenarios to practice learned skills and receive peer feedback

Negotiation

- Learn how to address people's issues first before seeking solutions
- Help customers identify interests rather than positions
- Invent options for mutual satisfaction
- Evaluate decisions using objective criteria

Time Management and Efficiency

- Learn to focus on preparation, prevention, and relationship-building
- Manage crises, pressing problems, interruptions, and time wasters

Action Planning

- Identify ways to transition CARE attributes from the workshop to the workplace

Plan specific actions and approaches to fulfill Customer CARE

Course Schedule

	Topics
AM	• **Examples of Customer Service** • **CARE Model** • **Listening** • **Increasing Awareness** • **Establishing Accountability and Credibility**
PM	• **Customer Interactions** • **Negotiation** • **Time Management and Efficiency** • **Action Planning**

Field of Study	Customer Service
Course Level	Beginner to Intermediate
Credits	
Learning Methods	Theater-style presentations followed by large or small group facilitated discussion
Equipment	Projector and Screen, Flip Chart, Online Survey
Suggested Prerequisites	None
Recommended Follow-up Courses	• Interpersonal Communication • Time, Information, and Priority Management • Collaboration for Enhanced Effectiveness • Courageous Decision Making

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Customer Service as a Strategic Advantage
2 Day Workshop

Business Need:
Targeted to organizations for which customer service is a strategic choice, this workshop addresses the important relationship between customer and provider, which will help you determine what your customers want and the best way to give it to them.

Course Description:
This workshop is designed for the organization's senior leadership team and is focused on leadership's role in creating a culture of customer service. This is NOT the customer service at the customer facing level. The workshop introduces your leadership team to the foundational, operational, and leadership-level concepts of customer service and engages them in exploring their role in ensuring exceptional service for both internal and external customers.

Course Objectives:
- Understand customer service as a competitive strategy to differentiate one organization from another
- Learn to listen for customers' needs and desires and understand how to meet their needs when you cannot provide what they desire
- Learn how to plan, measure, and improve customer service throughout your organization
- Learn the 4 Cs to success: Culture, Customers, Competition, and Cognition
- Learn how to measure and use Loyalty, Value, and Relationships
- Case study learning

Customer Service as a Strategic Advantage

2 Day Workshop

Course Topics

Customer Service as a Competitive Advantage

- Competitive strategies
- What do all customers want
- 4 P's of marketing
- Building blocks of great customer service

Culture, Customers, Competition, and Competition

- Function vs essence
- Defining moments in customer service
- Biases in customer orientation
- Customer alternatives

Loyalty, Value, and Relationships

- Customer attitude and orientation
- Why customers leave
- Quantifying the cost of customer loyalty
- Importance/performance assessment

Customer Service as Strategy

- Customer service as a reflection of the organization
- Leveraging the power of employee engagement
- Moving from where we are to where we want to be

Course Schedule

Day	Day 1	Day 2
AM	• Opening activities and discussions • What all customers want • Building blocks of great customer service	• Understanding the heart of customer loyalty • The "cost" of customer loyalty • Performance vs importance
PM	• Function essence • The power of culture to drive behavior • Biases in customer orientation	• Leveraging the power of employee engagement • Moving into the future: customer service as a strategic objective

Field of Study	Customer Service
Course Level	Current or potential senior organizational leaders
Credits	
Learning Methods	Case studies, Group activities, Instructor-led discussions
Equipment	Projector and Screen, Flip Chart,
Suggested Prerequisites	None
Recommended Follow-up Courses	

Delivery Formats:

We recommend a one-day workshop, or two 2-hour online webinars. We customize our delivery to meet your specific requirements; instructor-led workshops provide the most interaction and "hands-on" learning, but when there are travel restrictions and/or the need to limit the amount of time people are out of the office, consider our online workshops and training or hybrid delivery using both methodologies. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Moving Beyond Customer Service: Creating a Consultant Mindset

3 Days

Business Need:

The nature of the marketplace has fundamentally changed many customer relationships. Organizations ready to move beyond seeing themselves purely as a provider of goods and services and more as a long-term partner with customers will have a market advantage over their competitors by significantly deepening the customer relationship. While many organizations have grasped this new dynamic, they may lack the skills and tools to effectively serve as consultants.

Course Description:

This workshop explores the fundamental nature of consulting. Participants will learn the three fundamental skill sets of consulting, specifically:

- Alignment: establishing the customer/consultant relationship
- Discovery: gathering data to support appropriate recommendations
- Implementation: putting recommendations into action

They will have the chance to practice consulting skills in a safe workshop environment and receive detailed, specific feedback on their performance. Upon completion of the workshop participants will be able to enter into, manage, and conclude consulting projects of all degrees of complexity.

Course Objectives:

- Gain a basic understanding of what it means to be a consultant and what skills are necessary for success
- Learn how to deepen the relationship with clients using a proven consulting model
- Enhance communications and other inter-personal skills, including:
  - ◊ Listening
  - ◊ Skillful discussion
  - ◊ Effective presentations
  - ◊ Negotiations
  - ◊ Conflict management
  - ◊ Understanding change models

Moving Beyond Customer Service: Creating a Consultant Mindset

3 Days

Course Topics

Consultant Model

- Alignment
- Discovery
- Implementation

The Consultant Skill Set

- Listening
- Skillful discussion
- Effective presentations
- Negotiating agreement
- Dealing with resistance

Increase Awareness to Improve Effectiveness

- Use mental models to manage our natural inclination to make assumptions and draw conclusions
- Balance advocacy with inquiry to generate quality discussion

Establish Accountability and Credibility with Clients

- Role play client scenarios

Negotiation

- Learn how to address people's issues first before seeking solutions
- Help customers identify interests rather than positions
- Invent options for mutual satisfaction
- Evaluate decisions using objective criteria

Conflict Management

- Sources of conflict
- Conflict styles

Presentation Skills

- Look and feel of confidence
- Communicate persuasively

Change Models

- Application to client needs

Moving Beyond Customer Service: Creating a Consultant Mindset

3 Days

Course Schedule

Day	Day 1	Day 2	Day 3
AM	• Introduction to consulting • Case study part 1: customer needs and requirements	• Effective client communications: ◊ Ladder of inference ◊ Skillful discussion ◊ Communicating	• Conflict management • Case study part 2: deliver as promised
PM	• Effective client communications: ◊ Listening challenges ◊ Levels of listening	• Effective presentations • Negotiating Agreement • Dealing with client resistance	• Conclude case study • Data collection • Change models

Field of Study	Customer Service; Strategic planning
Course Level	Mid-level leaders
Credits	
Learning Methods	Case studies, Group activities, Instructor-led discussions
Equipment	Projector and Screen, Flip Chart
Suggested Prerequisites	
Recommended Follow-up Courses	

Delivery Formats:

This 3-day workshop can be customized to meet your specific requirements and can be delivered in a hybrid (mix of in-person and online) version. We are familiar with most online technology platforms and can deliver sessions using the platform that best fits your organization.

Appendix

Assessments for Use in Workshops and Team Sessions

Tool	Leadership	Teams	Coaching	Personal Development	Conflict	Career Choice	Dealing w/ Change	Commun-ication
MBTI	x	x	x	x	x	x	x	x
MBTI Step II	x	x	x	x	x	x	x	x
FIRO-B	x	x	x	x	x		x	x
EQ-i 2.0	x	x	x	x	x		x	x
EQ 360	x		x	x				x
TKI	x	x	x	x	x		x	x
DiSC	x	x	x	x	x		x	x
Birkman	x	x	x	x	x	x		x
Strength Finders	x	x	x	x		x		
True Colors	x	x	x	x	x	x		x
CCL 360	x		x	x				
SKILL-SCOPE 360	x		x	x				

This is an interactive PDF (portable document format) file. By clicking on a Tool in the left hand column in the Assessment Overview Chart, you will be directed to said item. To return to this chart, click on the blue header.
To return to the table of contents at any time, click on the blue footer.

MBTI

MBTI Step I

The Myers-Briggs Type Indicator (MBTI)® is a self-report questionnaire designed to help individuals identify their preferences for information-gathering and decision-making. In particular, MBTI measures our preferences in four areas:

- Where we get our energy: Extraversion or Introversion
- How we prefer to take in information: Sensing or Intuition
- How we prefer to make decisions: Thinking or Feeling
- How we orient ourselves to the world: Perceiving or Judging

The MBTI provides insight into the normal differences between people. The MBTI is based on Carl Jung's theory of psychological types which explains some of the apparently random behavior differences in people. Although each individual is unique, these differences fall into patterns that we can see and understand. With this understanding, we gain insight into ourselves and into others. An abundance of research supports the use of the MBTI. No other indicator has been as thoroughly studied and tested for validity and reliability. The MBTI assesses preferences, not skills.

Requires certification to administer.

Pros: Widely recognized as reliable and valid; in common usage; relatively quick to administer (20 minutes). Very "non-judgmental"…all types are shown to have value and be appropriate in the workplace and in relationships.

Cons: Many people have taken it and feel jaded by it. Some participants will be looking for something "new."

MBTI Step II

The Myers-Briggs Type Indicator (MBTI)® Step II provides the same information shown above in Step I, along with additional depth and clarification within each of the four MBTI preference pairs. It identifies some of the unique ways individuals express their personality type by breaking each of the four preference pairs into five additional facets. These 20 facets help individuals understand their personality type more completely. Step II also clarifies the differences that are often seen between two persons of the same type.

As with MBTI Step I, the Step II can be used for personal growth, leadership development, coaching, and understanding team dynamics. It is particularly useful in working with individual and teams who are familiar with MBTI Step I and would like to expand their understanding of their personality type. It is also used to help individuals clarify their MBTI Step I best fit type.

Requires certification to administer.

Pros: Takes MBTI to the next level; can be helpful for those who want to learn more or are tired of taking Step 1. Provides much more nuanced data.

Cons: Longer to administer (30 minutes). The amount of data it provides can be overwhelming to some folks, making it harder to process in a classroom setting. More suitable for 1-on-1 coaching.

FIRO-B

The FIRO-B (Fundamental Interpersonal Relations Orientation - Behavior) assessment is based on the theory of interpersonal relations developed in 1958 by Will Schutz. According to Schutz, most human interaction can be explained by three dimensions of interpersonal relations – Inclusion, Control, and Affection; and whether these needs are expressed or wanted. The following gives a brief description of each aspect of interpersonal behavior:

- Expressed (E): how much the person wants to initiate the action
- Wanted (W): how much the person wants to be the recipient of the action or wants others to initiate the action
- Inclusion (I): being recognized, feeling a sense of belonging, participating in actions
- Control (C): having influence and responsibility and leading others
- Affection (A): achieving closeness, warmth and showing sensitivity

The FIRO-B assessment reveals how our preferences impact our interactions with others.

Requires certification to administer.

Pros: Well validated instrument; can be nice change from those tired of taking MBTI. Focuses on relationships and how to best deepen them. Good for established teams. Relatively quick to administer (20 minutes).

Cons: Can come across as judgmental; e.g. it is possible to get a score of “0” in the areas of inclusion, control and affection. That doesn’t mean a person has no capability in these areas, but it can come across that way. Consequently it can be difficult to process for some participants.

BarOn EQ-i 2.0

Respondents complete an assessment that provides insight into key areas of emotional skill that relate directly to professional and personal effectiveness. There are 5 scales and 15 subscales that are measured. The five scales are:

- Intrapersonal
- Interpersonal
- Stress management
- Adaptability
- General mood

The assessment identifies areas of strength that can be leveraged to achieve full potential. It also shows areas that need improvement and provides tools to address those areas. The Emotional Quotient Inventory (EQ-i®) is the first scientifically validated and most widely used Emotional Intelligence assessment in the world.

The BarOn EQ-i 2.0 is a self-report assessment of 125 or 133 questions that takes approximately 20 minutes to complete.

Requires certification to administer.

Pros: EQ is becoming increasingly acknowledged as a key leadership attribute. Unlike MBTI, EQ focuses less on "our preferences" and more on our emotional intelligence traits, and provides ideas on how to do that.

Cons: As with FIRO-B, it can come across as harsh to some people. Receiving a low score in "empathy" can sting. That's not the intent, and if someone is low on empathy and it's holding them back as a leader, it's good to know that. Still, there can be some processing challenges.

BarOn EQ 360

The EQ 360 provides a more in depth analysis of the individual's emotional and social skill by having those people that work with the individual provide information on the 5 scales and 15 subscales that are measured. This could include peers, direct reports, the boss, the boss's peers, family and friends. The observers ratings are compared to the results of the individual's standard EQ-i 2.0 self-report for a more complete 360-degree view. The EQ-360 identifies key employee strengths that can be leveraged to the benefit of the organization, as well as impediments to high performance that could be improved.

BarOn EQ 360 is a new 360 assessment and a multi-rater survey of 135 questions.

Requires certification to administer.

Pros: Takes the standard EQ to the next level in providing input on how others see us. A much more thorough and comprehensive look at EQ and how we are perceived.

Cons: Requires multiple raters, each of whom will require 30 minutes to complete the survey. Can be a drain on a team that is taking this assessment, as it can quickly add up to several hours apiece as people complete their own and others assessments. As with the "basic" EQ, it has the potential to come across as punishing. Best done in a coaching 1-on-1 relationship rather than in the classroom.

Thomas-Kilman Conflict Mode Indicator (TKI)

TKI provides insight into our preferred method of dealing with conflict and deepens our understanding of why others may prefer a different approach. By knowing our personal preferences for addressing conflict, we are empowered to act counter to those preferences when the situation calls for it. The TKI model is based on a five-category scheme for classifying interpersonal conflict-handling modes:

- Competing
- Collaborating
- Compromising
- Avoiding
- Accommodating

The TKI has been used for more than 35 years and is the leading measure of conflict-handling behavior. The TKI assessment is a simple tool that provides practical situational approaches dealing with conflict. It takes approximately 20 minutes to complete.

Does NOT require certification to administer.

Pros: Relatively quick assessment. Can be a nice complement to MBTI if the facilitator is familiar with both instruments and can show how our type can play out in how we deal with conflict. Can be incorporated into a half-day workshop with ease. Very helpful for team understanding of one another.

Cons: Some participants find the categories off-putting (competing, accommodating, etc) although that is readily handled by a good facilitator.

DISC

The DISC Profile is a multi-purpose learning instrument that helps individuals assess to what degree they utilize each of four dimensions of behavior in a given situation. The instrument then provides feedback designed to help people in your organization to better understand themselves and their colleagues. The assessments classify four aspects of behavior by testing a person's preferences in word associations. DISC is an acronym for:

- Dominance – relating to control, power, and assertiveness
- Influence – relating to social situations and communication
- Steadiness – relating to patience, persistence, and thoughtfulness
- Conscientiousness – relating to structure and organization

The DiSC is assessment focuses on a specific situation, such as work. The assessment takes approximately 20 minutes.

Does NOT require certification to administer.

Pros: Quick, easily done right in the classroom. Self-scored. Is a nice alternative to those who are tired of the MBTI. Can appear more immediately applicable to participants as it deals with communications and relationship challenges everyone faces and is familiar with.

Cons: Is becoming “common” and many will be familiar with it.

BIRKMAN

The Birkman Method assessment is a personality assessment designed to identify an individual’s normal, interpersonal style of behaviors dealing with relationships and tasks. This assessment provides insight on underlying motivations and needs and the behaviors expressed when underlying motivation and needs are unmet. Interests serve as drivers to behavioral and occupational preferences. This extensive analysis combines motivational, behavioral, and interests in five major perspectives:

- Usual Behavior – an individual’s behavioral style of dealing with relationships and tasks
- Underlying Needs – an individual’s expectations of how relationships and social situations should be governed in context of the relationship or situation
- Stress Behaviors – an individual’s ineffective style of dealing with relationships or tasks; behavior observed when underlying needs are not met
- Interests - an individual’s expressed preference for job titles based on the assumption of equal economic rewards
- Organizational Focus - the perspective in which an individual views problems and solutions relating to organizational goals

Birkman method is a trait based instrument that measures personality. This extensive instrument takes approximately 30 to 45 minutes to complete. The Birkman method is used for Improving team dynamics, coaching, training, employee engagement, employee selection, and organizational alignment.

Requires certification to administer.

Pros: Very in-depth and comprehensive, using 298 questions. Best used, at least initially, in coaching vice team settings. With familiarity, can then be used effectively in a team setting.

Cons: Done right, takes a long time to process. 1-on-1 coaching on the assessment itself can last up to a full day.

StrengthFinders 2.0

StrengthFinders is an assessment created by Gallup to measure an individual's talents. The assessment is based on the notion that people have more potential for growth when they invest their time and energy in developing their strengths. The concept allows individuals to uncover their top 5 talents from 34 themes of talents. This assessment helps individuals find the areas where they have the greatest potential to develop strengths.

StrengthFinders 2.0 is a well-known assessment that ranks in individuals strengths and talents. This assessment takes approximately 20 minutes.

Does NOT require certification.

Pros: Very inexpensive and easy to administer. Participants pay for a book and get both the book and the assessment which they take online. Results are immediately available. Can be very affirming, in that it (as the title says) focuses on strengths. Can also be very helpful in a team setting as individuals gain insight into one another's strengths and how to leverage them.

Cons: Some may find it "soft" in that it focuses on strengths and not much on areas for improvement.

True Colors Personality Test

The True Colors Test is a simple personality survey designed to can help individuals understand their own and others' personality and behaviors. It provides insights that allow the individual to better understand how others see them. The assessment takes Temperament Theory and applies it to color categories, then introduces the concept of a person's Color Spectrum - that each individual has a unique color order of the temperaments, including the intensity of each color. The assessment identifies the individual's strongest and secondary color. The model has its origins in Temperament Theory. Temperament Theory also undergirds MBTI.

The assessment can stand alone or be woven into programs such as: team building, leadership, communication, interpersonal skills, conflict management, collaboration, etc.

Requires certification to administer.

Pros: Can be used as a shorthand alternative to MBTI. The 4 colors are easy to remember, and are less confusing (at least for those new to the model) than the 16 MBTI types. As with MBTI, it is very non-judgmental. Each of the 4 colors has strengths needed in the workplace.

Cons: The use of the colors, while helpful as a memory aid, can come across as "gimmicky" to some clients.

CCL 360 by Design

CI has partnered with the Center for Creative Leadership to administer and interpret 360-degree assessments. 360-degree feedback is a method of systematically collecting opinions about an individual's performance from a wide range of coworkers. This could include peers, direct reports, the boss, or the boss's peers — along with people outside the organization, such as customers. The benefits of collecting data of this kind are that the person gets to see a panorama of perceptions rather than just self-perception, which affords a more complete picture. CCL 360-degree instruments provide a consistent reporting format to help organizations create a common leadership language and consistent feedback process at multiple levels throughout the organization. This assessment provides feedback on core competencies along with written feedback on the individual's areas of strengths and areas of weaknesses.

This 360-degree assessment takes approximately 30 minutes to complete for the individual and the raters.

Certification is required to administer and provide feedback.

Pros: The 360 by Design can be customized to address an organization's core competencies, so it feels very focused on the needs of a particular organization. As with any 360, it provides insight from multiple perspectives. Can be processed in both an individual and group setting, but individual coaching is more effective. Results are presented in a clear and easy to understand manner.

Cons: Many find the number of questions to be cumbersome. If done in a team setting, it can involve an investment of time amounting to several hours for each team member.

SKILLSCOPE 360

SKILLSCOPE is a 360 assessment that assesses 15 job related skills that are essential for supervisor or manager success. This is a straightforward feedback tool that identifies managerial job-related strengths and weaknesses. The 15 job related skills fall under the following categories:

- Information Skills
- Decision-Making
- Interpersonal Skills
- Personal Resources
- Effective Use of Self

The SKILLSCOPE 360 is a quick, simple assessment that focuses on supervisory job related skills. This 360 takes approximately 20 minutes to complete by the individual or raters.

Certification is required to administer or provide feedback.

Pros: Assesses similar topics to the 360 by Design, but is quicker and easier to administer. As with any 360, it provides insight from multiple perspectives. Can be processed in both an individual and group setting; individual coaching is more effective. Results are presented in a clear and easy to understand manner.

Cons: Can't be modified, although the questions address the most common leadership competencies. Although shorter by comparison to other 360s, it can still be cumbersome. If done in a team setting, it can involve an investment of time amounting to several hours for each team member.

Workshop by Catagory	Workshop Duration	Webinar or Hybrid Option Available?*
Leadership Programs		
Leadership for New Supervisors	3 days	Hybrid
Mid-Level Leadership Program	10 days	Hybrid
Senior Executive Leadership Program	10 days	Hybrid
Leadership Sessions		
Fundamentals of Leadership	1 day	Webinar
Leading without Formal Authority	1 day	Webinar
Influencing Upwards	Half-day	Webinar
Why Good Leaders Fail	1 day	Webinar
Courageous Decision Making	1 day	Webinar
Tactical to Strategic Thinking	1 day	Webinar
Mentoring Skills	1 day	Webinar
Managing Conflict and Negotiating Agreement	1 day	Webinar
Emotional Intelligence for Leadership and Self-Awareness	1 day	Webinar
Coaching		
Coach Training	3–5 days	Hybrid
Executive Coaching	10 sessions	N/A

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Workshop by Catagory	Workshop Duration	Webinar or Hybrid Option Available?*
Communications		
Interpersonal Communications	1 day	Webinar
High Impact Communications	2 days	Hybrid
High Impact Writing	2 days	No
Productivity and Efficiency		
Time and E-Mail Management	1 day	Webinar
Efficiency, Productivity, and Time Management	2 days	Hybrid
Becoming a Paperless Office	½ day	Webinar
Work-Life Balance	½ day	Webinar
Efficiency and Productivity Coaching	In-person	N/A
Teams (workshops)		
Efficiency and Productivity Coaching	In-person	N/A
Collaboration for Enhanced Effectiveness	2 days	Hybrid
Leading Project Teams	1 day	Webinar
Meeting Management	1 day	Webinar
Meeting Facilitation	3 days	Hybrid

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Workshop by Catagory	Workshop Duration	Webinar or Hybrid Option Available?*
Team Building (facilitated with intact teams)		
Team Building to Improve Employee Engagement	2 days	Hybrid
Team Building for a New Team	2 days	Hybrid
Team Building to Build Trust within or between Teams	2 days	Hybrid
Team Building to Enhance Conflict Skills	2 days	Hybrid
Team Building for a Team Experiencing Change	2 days	Hybrid
Team Building for a Team with a New Leader	2 days	Hybrid
Team Building for an Existing Team	2 days	Hybrid
Change Management		
Leading Change	2 days	Hybrid
Change Management for Employees	1 day	Webinar
Telework		
Making Telework Work	½ day	Webinar
Leading in a Telework Environment	½ day	Webinar
Conducting Virtual Meetings	½ day	Webinar

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Workshop by Catagory	Workshop Duration	Webinar or Hybrid Option Available?*
Performance Management		
Setting Goals and Objectives	½ day	Webinar
On-going Feedback and Communications	½ day	Webinar
Writing Self-Assessments	½ day	Webinar
Addressing Under-Performance	½ day	Webinar
Rewards and Recognition	½ day	Webinar
Conducting the Performance Appraisal	½ day	Webinar
Diversity and Inclusion		
Introduction to Diversity and Inclusion: e-module	2 hour e-module	N/A
Creating a Culture of Inclusion	1 day	Webinar
Micro Messaging	½ day	Webinar
Examining Individual and Cultural Bias	1 day	Webinar
Communicating across the Generations	½ day	Webinar
Diversity	1 day	No

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Workshop by Catagory	Workshop Duration	Webinar or Hybrid Option Available?*
Customer Service		
CARE Customer Service	1 day	Webinar
Customer Service as a Strategic Advantage	2 days	No
Moving Beyond Customer Service	3 days	Hybrid

*Hybrid is primarily in-person, with some elements delivered online. Webinars are delivered entirely online.

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MOBIS

CI International, a certified small business, has been awarded GSA's MISSION ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS) schedule 874. The MOBIS program offers a full range of management and consulting services that can improve your performance, and your endeavors to meet your mission goals. All of the services outlined in this e-catalog are available through our MOBIS contract number GS-10F0034J. For more information, visit GSA's E-Library site at: www.gsaelibrary.gsa.gov/ElibMain/home.do

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