Welcome to the next phase of your Leadership Development Program.

Objectives and Outcomes
- Develop strategic & critical thinking skills
- Confidence in financial analysis competency
- Improve collaboration with peers to establish plans
- Evaluate and improve processes
- Align organizational systems

Time Line & Homework

- Launch
  - Business Case Preparations
  - Leadership Team Pre-work
  - Save the Date & Homework
- Event 1
  - Training
- Event 2
  - Months 2-4
  - Group Coaching, Internal Project Meetings, & Internal Mentor Meetings
  - Shark Tank Session

Visit Business Acumen & Strategy for Managers Training online. For a complimentary consultation and to learn more about our Shark-Tank-Like corporate competition, please call us at 281-469-4244 or email Leader@TurnKeyCoachingSolutions.com
Components

**Business Cases**
- Leadership Team defines four specific projects
- Each team will be assigned a project that is related to a high level strategic company goal

**Capstone Projects**
- Develop an Important Business Case
  - Project group/team driven meetings
  - Group coaching
  - Internal mentoring
  - Business case coaching and feedback
  - Video presentation
  - Pre-presentation dress rehearsal

**Training**
- Business case analysis
- Strategic & critical thinking
- Cost management or finance fundamentals

**Shark Tank Competition**
- Teams Present to Investor Panel
  - One-day coach facilitated Assessment
  - Matrix defined
  - "Investor Panel" evaluate and rate projects
  - Awards ceremony

**Homework**
SAMPLES: The assigned reading may change pending program customization:

---

Visit **Business Acumen & Strategy for Managers Training** online. For a complimentary consultation and to learn more about our Shark-Tank-Like corporate competition, please call us at **281-469-4244** or email **Leader@TurnKeyCoachingSolutions.com**
Mentors vs. Investor Panel

Mentors

1. Mentors are members of the Leadership Team and assigned according to project knowledge.
2. Mentors will receive an orientation and specific “rules of the road.”
3. Mentors meet with their project teams to review and provide feedback on their business case.
4. There will be at least two mentor/team meetings (self-initiated).
5. Mentors will not be on the investor panel.

Investor Panel

1. The projects will be presented to a panel of executives.
2. The panel will use a matrix to score projects based on their strategic fit, financial value, benefit to customers, market attractiveness, and level of effort put into the business case analysis and presentation.
3. Presentations will be 60 minutes followed by 30 minutes for Q&A.
4. All projects will result in a Go, No-Go, or Change rating. Additional acknowledgments will include overall presentation, innovation, and teamwork.

Visit Business Acumen & Strategy for Managers Training online. For a complimentary consultation and to learn more about our Shark-Tank-Like corporate competition, please call us at 281-469-4244 or email Leader@TurnKeyCoachingSolutions.com
1. What are the components of the program?

**Training:**

- Business case analysis
- Strategic and critical thinking
- Finance fundamentals

**Capstone Projects ~ Real Work Business Cases:**

- Team driven project groups
- Facilitated group coaching
- Internally driven mentor/group feedback
- Competition via Shark Tank

2. What are the objectives of the program?

**Objectives ~ Organizational**

- Strategic human resource development
- Align development with the Mission, Vision and Strategic Plan
- Learning retention & increased competency
- Business competency development designed to impact the bottom-line
- Team projects with tangible strategic impact to business

**Objectives ~ At the Cohort Level**

- Encourage participants to routinize the sharing of best practices in management
- Expose the leaders to cross-functional problem solving with minimal risk to the business
- Build alliances across functions that can develop into concrete linkages for future collaboration
- Healthy competition and collaboration in Shark Tank challenge

**Objectives ~ At the Individual Level**

- Develop strategic and critical thinking skills
- Ensure a foundational confidence in financial analysis competency
- Develop strategic agility
- Develop the ability to ask questions that generate new thinking and solutions
- Set effective team goals
- Collaborate with their team to establish plans
- Evaluate and improve work processes
- Align organizational systems
- Engage in systems thinking/integrate continuous improvement focus

3. How are participants selected?

Criteria for selection is defined by analysis of performance / potential vs. future role demands. Each strategic business unit (SBU) or support office may nominate participants based on its unit-specific strategy, goals, and current and future leadership needs. Alternatively, an application process may be established.
4. What is the overall objective of the project teams?
   Combine learning and real work projects to produce strategic solutions while developing leadership competency and teamwork effectiveness.

5. Are the projects assigned to specific teams or does the team get to select their project?
   The executive team will identify high-level projects and provide the project team with the specific strategic goals and an overview of their perspective of the challenges.

6. Who approves of the project outline?
   The project overview is defined by the executive team. The details of which will be further refined by the project teams. Each team will have the opportunity to receive feedback from an assigned senior leader mentor.

7. How are the teams made up?
   Each team will be cross functional and include members from each functional business area.

8. How are team leaders selected?
   Each team will designate their own team leaders.

9. How do the project groups purchase resources, if needed?
   Each team will have a small budget ($500 is typical) to spend, at their discretion, in support of their business case project and presentation. Examples include external consultant, a graphic designer, marketing or presentation materials, computer modeling, etc.

10. How often do the teams meet?
    Each team can determine its own meeting schedule, time commitment, etc. It is expected that teams will have two meetings per month at a minimum.

11. How are the mentors selected?
    Mentors are members of the Leadership Team and assigned according to project knowledge area. Mentors will not be on the Investor Panel.

12. Who will facilitate the meetings?
    Each team will be autonomous and self-facilitate internal team meetings. There will also be coach facilitated group coaching sessions and at least two mentor/team meetings.

13. How are the projects measured?
    The Investor Panel will use a matrix to score projects based on their strategic fit, financial value, benefit to customers, market attractiveness, innovativeness, and level of effort put into the business case analysis and presentation.

14. Are there guidelines for participants?
    The guidelines will be communicated to all participants both verbally and in writing during the two day training session.
15. What are participants required to do in preparation?
   Complete the assigned reading: "Thinking Strategically", "Developing a Business Case", and "Understanding Finance".

16. Who judges the team projects?
   The projects will be presented to an "Investor Panel" comprised of executive stakeholders.

17. Will the projects actually be implemented?
   The projects are intended for implementation pending a variety of factors including costs, viability, timing, marketplace condition, competitive analysis, etc.

18. Will there be support from functional areas?
   Yes, the project group will have structured and fair support from functional areas.

19. Will each team have designated contacts?
   One or more primary contacts will be designated for each functional area.

20. Are there guidelines for mentors?
   There are very specific guidelines and “rules of the road” for mentors:

   **MENTOR RULES OF THE ROAD**

   **Fair**
   - Mentor = Not on Shark Tank Panel
   - At least Two Mentor/Team Meeting
   - Mentor may not:
     - Solve the problem
     - Do the work/Build the case
     - Initiate resources
     - Direct a preferred solution
     - Conduct the presentation
     - Overrule the team decisions

   **Supportive**
   - Mentor = Coach
   - The mentor's role is to:
     - Coach
     - Question
     - Play the devil's advocate
     - Provide feedback
     - Share experience
     - Confidential: The mentor is not to discuss or share opinions about the project/team outside the mentor meeting.
21. Will there be a practice session?
   Each team will have the opportunity to present their project to the team mentor and the team coach prior to the final presentation.

22. How much time will be available for presentations?
   Presentations will be 60 Minutes for each team and 30 minutes for Q&A.

23. Is participation mandatory?
   Yes. Our program manager will work with your designated key stakeholders to ensure buy-in and engagement in the program.

24. What if participants cannot make all of the events or meetings?
   Participants need to make every effort to make all of the events. Peer surveys are administered to ensure peer accountability and encourage fair contribution.

25. How is the training designed?
   The training employs the best-practices in adult learning theory.

---

**Adult Learning Retention**

- **Lecture:** 5%
- **Reading:** 10%
- **Audio Visual:** 20%
- **Demonstration:** 30%
- **Discussion Group:** 50%
- **Practice by Doing:** 75%
- **Teaching Others:** 90%

Research Study: National Institute for Applied Behavior Science

---

TurnKey Coaching Solutions is ready to design your program. Let us know how we can make this an outstanding learning experience that produces results!

For more information on our better than business simulation competition training, visit us online. For a complimentary consultation and to learn more about our commercial acumen training, call us at 281-469-4244 or email Leader@TurnKeyCoachingSolutions.com