

## Leadership Breakfast

Certificari pentru capabilitati interne de  
leadership development

**Monica Nicolescu**  
Senior Consulting Associate  
International Master Trainer  
Coach PCC  
Human Invest

**Viorel Panaite**  
Managing Partner  
Human Invest



 **Bucuresti**

 **17 Iunie**  
**9:30 - 12:30**



**Peste  
50 de membri  
in comunitatea  
trainerilor interni  
din Romania pe  
care i-am  
certificat si  
instruit in ultimii  
10 ani!**

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ultimii 10 ani!

## Invitati:



Carmen Iliescu  
Europe L&D Leader  
TELUS Digital



Mihai Frunza  
Learning and Development  
Consultant, Orange

**Care sunt sau ar putea fi  
beneficiile companiilor  
care adopta un astfel de  
model de lucru, beneficii  
atat pentru organizatii,  
cat si pentru cei care se  
certifica?**



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**HumanInvest**  
Leadership • Cultural Change • Teams

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**Simplificarea muncii profesionistilor din HR prin accesul la programe deja dezvoltate, validate si testate.**

- **Usor adaptabile si reconfigurabile** pentru a adresa o diversitate de teme organizationale.
- Fiecare program a fost **testat mai intai de catre noi**, intr-un numar mare de ani, intr-o diversitate de industrii, cu o diversitate de profile de participanti si contexte din cele mai dificile.
- Toate programele sunt foarte bogate in mijoace pedagogice profesionale: **“facilitator guide”** pentru recomandari privind conducerea fiecărei activitati din program, exercitii atractive si interactive, studii de caz video si scrise, PPT-uri editabile si usor de adaptat – sunt doar cateva exemple



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## Fructificarea si sustinerea pasiunii trainerilor interni pentru munca lor.

- Cei care sunt traineri interni cu adevarat pasionati si competenti in rolul lor stiu ce inseamna sa aiba **acces la programe profesionale** special concepute pentru ei.
- Ei vor sa vada ca efortul lor de instruire si indrumare (F2F sau virtual, in sala sau on-the-job) are un **impact pozitiv cat mai mare**.
- Doresc sa se concentreze cat se poate de mult pe **cresterea calitatii procesului de lucru** din program fara sa-si piarda timp prea mult in "reinventarea rotii" si in cautarea de resurse,
- **Vor sa faca parte dintr-o comunitate de profesionisti**, cu roluri similare – la fel de pasionati, si impreuna cu care sa se inspire reciproc si sa faca schimb de experienta.

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## Scalabilitatea si sustenabilitatea investitiilor de consolidare organizationala la costuri reduse.

- Programele pe care le punem la dispozitie organizatiilor lor prin certificari ofera posibilitati multiple de **integrare in curricula interna**,
- Oferă o **complementaritate** usor vizibila si o **coerenta** excelenta intre ele, lucruri care asigura **continuitatea** in construirea de solutii cu real impact pozitiv in organizatie.
- Pentru ca **eforturile de scalare sa fie sustenabile**, oferim indrumare si asistenta constanta trainerilor interni, actualizarea "for free" a programelor, inclusiv a **infrastructurii digitale solide** care le insoteste pe fiecare din ele – atat pentru lucru F2F, cat si pentru lucru in mediu virtual.

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### Promovarea si consolidarea rolului managerilor ca “Teacher and Coach”.

- Foarte multi **manageri doresc sa-si imbogateasca si sa-si diversifice rolul**, sa se implice in rol de team-coach, facilitator, ambasador al unei culturi organizationale constructive.
- **Mesaj puternic** atunci cand managerii sa implica personal in instruirea directa a altor angajati din companie.
- Ei si-au dezvoltat **competente de facilitare si instruire** (care ii ajuta enorm si in alte roluri!) si conduc anul 5 – 6 workshop-uri, in paralel cu cele conduse de colegii lor, trainerii interni.

**Certificari pentru  
traineri interni**

Cand am inceput constructia comunitatii trainerilor interni pe care i-am certificat, am avut doua intentii. Prima, pentru a extinde impactul rolului lor, creand ambasadori credibili, profesionisti si pasionati in interiorul organizatiilor. A doua, pentru a asigura un spatiu de conectare, sprijin reciproc, invatare colectiva si schimb de experienta - exact spatiul care le ofera o voce puternica si de impact in munca lor.

In acest moment comunitatea numara peste 50 de membri si este formata din traineri certificati pe programele Blanchard, Wiley si Mojo. Prin aceasta retea de profesionisti, programele au continuitate si capata inca si mai multa forta, devenind parte integranta din cultura de invatare a fiecarei companii.

Alexandra Culicovschi  
Senior Consulting  
Associate  
Product Development  
Manager  
Coach ACC





## Parteneri internazionali



Sustenabilitate, scalare,  
coerenta si impact

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## Exemple Local Clients Traineri Interni Certificati Blanchard, DiSC, Mojo



*"We provide the leadership language and models that drive the most successful organizations."*

—Scott Blanchard

## Exemple Global Clients Traineri Interni Certificati Blanchard



*"We provide the leadership language and models that drive the most successful organizations."*

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## Exemple Global Clients Traineri Interni Certificati Blanchard



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Leadership • Cultural Change • Teams



## Cele mai populare din programele noastre folosite de trainerii interni certificati

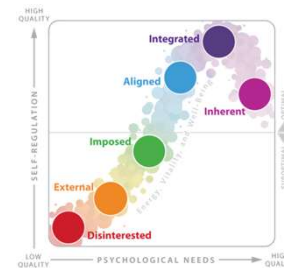


**Self Leadership**

blanchard.



**Conversational Capacity**



**MOJO  
MOMENTS™**  
Turning leadership insight-out

**Mastering Your  
Motivation**

# Prezentari sintetice ale celor mai populare programe folosite de trainer interni in Romania





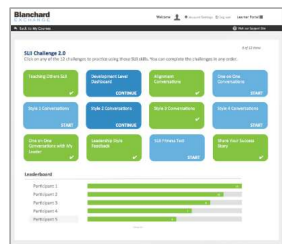
blanchard®

## SLII®

The world's most-taught leadership framework, SLII® teaches managers how to unleash the potential of their direct reports by leading situationally: giving the right support and right direction at the right time. This enables employees to develop faster, succeed more, and reach their full potential. It also gives managers a common leadership language.

### Outcomes and competencies:

- Increase the quality and quantity of conversations about performance and development
- Build leadership skills and common language.
- Use different leadership styles at the appropriate time
- Build skills in goal setting, giving work direction, encouraging self-reliant problem solving, listening, observing and monitoring performance, and giving feedback.



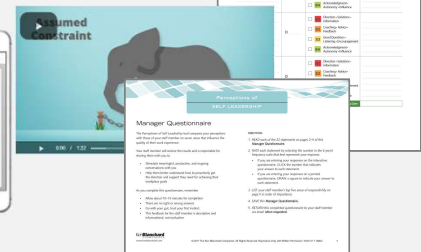
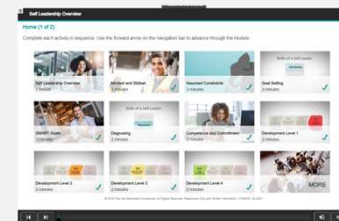
## Self Leadership

Self Leadership teaches individuals at all levels in an organization to learn the behavior required to move from being responsive to being responsible for their role in an organization's success. They learn a shared language for discussing their development and performance to have more effective conversations and build more trusting, open relationships with their managers. These skillsets and mindsets are the foundation for a culture of innovation.



### Outcomes

- Learn the mindset and skillset of Self Leadership
- Practice being proactive when asking for direction and support in conversations with your manager
- Learn how to challenge assumed constraints
- Learn how to set SMART goals
- Explore and activate personal points of power



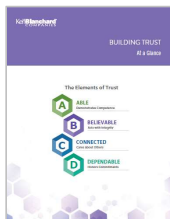


# Building Trust

Trust in the workplace is a prerequisite for success, so when it's missing, there's little collaboration and suspicion. Building Trust teaches how to cultivate trust and repair it when it's been compromised. Using the Elements of Trust Model, learners discover how to inspire engagement and commitment.

## Outcomes and competencies:

- Understand the importance of trust in the workplace
- Learn a common language from the Elements of Trust Model to create and enhance trusting relationships
- Understand what builds, sustains, and erodes trust
- Learn communication skills for strengthening trusting relationships with direct reports and colleagues
- Create a personalized action plan for becoming a more trustworthy person/leader/manager
- Understand that trust is a critical skill to be an effective leader or self-leader.

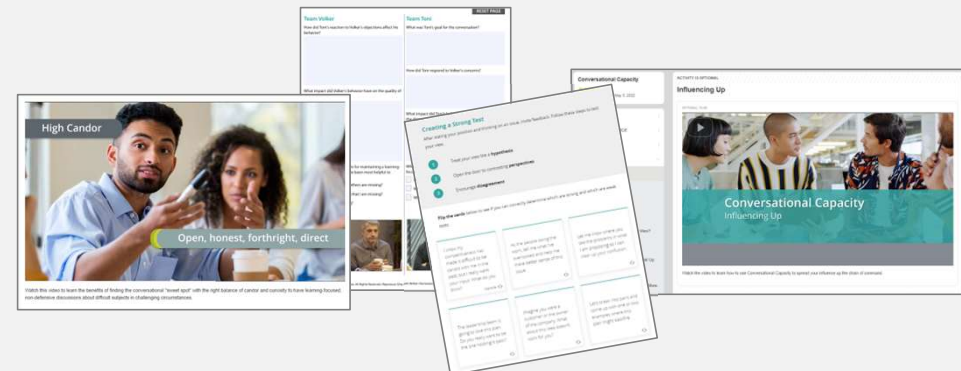


# Conversational Capacity®

Organizations move at the speed at which people communicate effectively and solve problems collaboratively. However, that can get tricky when the pressure is on or people have different opinions. We teach people how to balance candor and curiosity to get the greatest benefit out of the most challenging conversations.

## Outcomes and competencies:

- Increase your Awareness of the factors that limit your Conversational Capacity in stressful situations.
- Cultivate a Conversational Capacity mindset in stress.
- Learn and practice the Conversational Capacity Skillset.
- Plan and commit to back home actions for using the Conversational Capacity
- Communication and influencing skills.



## Coaching Essentials®

The ability to coach is one of the things that separates great leaders from the rest. Coaching Essentials® teaches managers the four key skills needed for effective coaching and provides opportunities for practice. When managers can coach effectively, their direct reports are more productive, loyal, and engaged.



### Outcomes and competencies:

- Provide a consistent method for leadership and coaching
- Accelerate the progress of teams and individuals in achieving organizational objectives
- Create an environment of trust that supports development and growth
- Use a coaching process that produces mutual understanding and spurs action
- Leverage key communication skills that improve interactions
- Determine which coaching approach will enhance an employee's performance
- Adopt a coaching mindset of service and of drawing out ideas
- Conduct coaching conversations with confidence
- Build on SLII by providing effective coaching based on the individual's needs.

## First-Time Manager (Management Essentials)

Most new managers are promoted before they have the skills to be an effective manager. Our First-time Manager program teaches the mindset, core conversations, and communication skills needed to step into their new role equipped for success, so their direct reports are engaged and productive from the start.



### Outcomes and competencies:

- Adopt a manager mindset
- Understand and use the Four Core Conversations
- Learn and practice the four essential skills managers need to balance relationships and results
- Improve communication skills
- Foundational management and leadership skills

### Listen to Learn



### Inquire for Insight



### Tell Your Truth



### Express Confidence

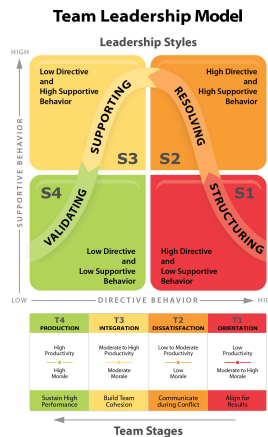


# Team Leadership

Many teams often fail to accomplish their goals due to ineffective leadership. Our Team Leadership program teaches team leaders how to provide clarity, manage conflict, and build trust to successfully grow, breakthrough barriers, and sustain high-performance teams.

## Outcomes and competencies:

- Develop a team performance mindset
- Correctly identify and diagnose team needs;
- Deliver the right balance of team direction and support
- Gain skills to improve collaboration, innovation, and team effectiveness
- Leadership and Management Skills at team level.
- Contracting - Obtain alignment regarding team purpose, roles, goals, and norms by using Team Charter Worksheets.

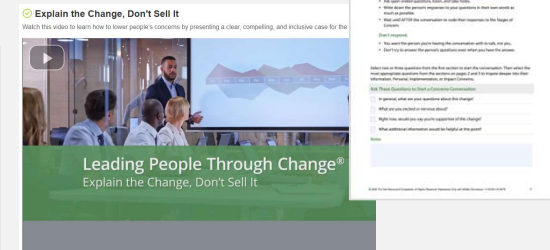
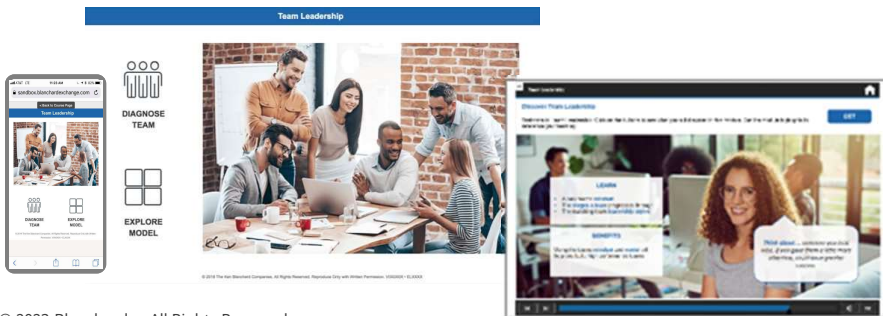
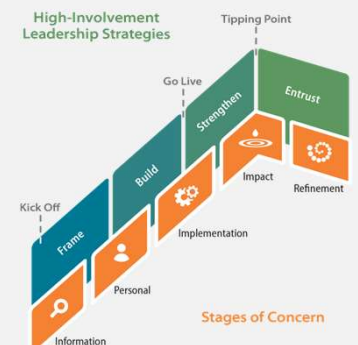


# Leading People Through Change®

Leading People Through Change® teaches executives and managers how to lead successful change initiatives by involving others throughout the change process. Collaborative conversations allow challenges and concerns to be identified early for people to understand why the change is needed, what to change, and how to do it. This decreases the feeling of being controlled and builds momentum for the change.

## Outcomes and competencies:

- Understand why change fails
- Develop strategies to minimize resistance and maintain productivity and morale
- Assess your organization's current readiness for change
- Build skills in handling predictable concerns that accompany change
- Give leaders the capability and skills to manage change



# Servant Leadership Essentials™

Servant leaders are consistently interested in providing what their people need to be successful. They want to make a difference in the lives of their people and, in the process, benefit the organization. Servant leadership is a mindset and a skillset focusing on serving others first. Blanchard's Servant Leadership Essentials™ program teaches leaders how to build trust, listen, and give and receive feedback in ways that lead to higher levels of engagement, performance, and human satisfaction.

## Outcomes and competencies:

- Build a community that people feel part of and can identify with.
- Think of others first by leading with heart and asking yourself whether you are here to serve or to be served.
- Turn the organizational pyramid upside down so that rather than employees being responsive to managers, they become responsible and able to respond.
- Leadership and communication skills.



## Giving Feedback

Feedback is a gift and should be received as one, but so often attempts to provide feedback result in tension and conflict rather than self-reflection and growth. Giving and receiving feedback offers a situational focus that helps leaders identify exactly the type of feedback that is most appropriate for the situation.



## Outcomes and competencies:

- Know when and how to give feedback;
- Learn how to create a relationship where people are open to hearing feedback;
- Understand the differences between different types of feedback:
  - - Pure Feedback on What. This is nonjudgmental, descriptive feedback that provides objective information about results or outcomes
  - - Pure Feedback on How. This is nonjudgmental, descriptive feedback that provides objective information about the activities or the way in which results are obtained
  - - Personalized Feedback—Praise. This is judgmental feedback (positive) designed to encourage desired behavior in the future
  - - Personalized Feedback—Disapproval. This is judgmental feedback (negative) designed to extinguish undesired behavior

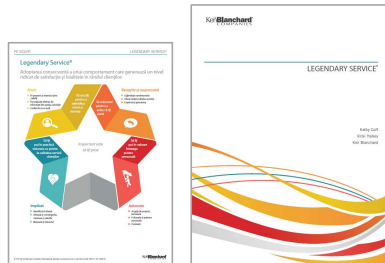


# Legendary Service

Every company knows that great service is paramount to organizational success, yet few have a proven plan to build a customer service culture. Our Legendary Service program provides a systematic approach to customer service that enables your workforce to consistently deliver ideal service that keeps customers coming back.

## Outcomes and competencies:

- Define their personal service vision;
- Identify customers' needs and wants;
- Learn and practice skills for building customer satisfaction and loyalty;
- Develop strategies to empower themselves and create an action plan.
- Customer service.
- Accountability and responsiveness.



# Courageous Inclusion

This workshop offers a framework for creating a more inclusive workplace environment, by teaching participants: a mindset that promotes diversity and inclusion a process to help people become more knowledgeable and active proponents of inclusion in their workplace.



## Outcomes and competencies:

- Understand the benefits of diversity and inclusion
- Embrace the Courageous Inclusion mindset
- Recognize the four stages of the Courageous Inclusion model
- Create a personal action plan to improve inclusivity.



# Online Platform (Blanchard Exchange): example of follow-up after SLII Experience

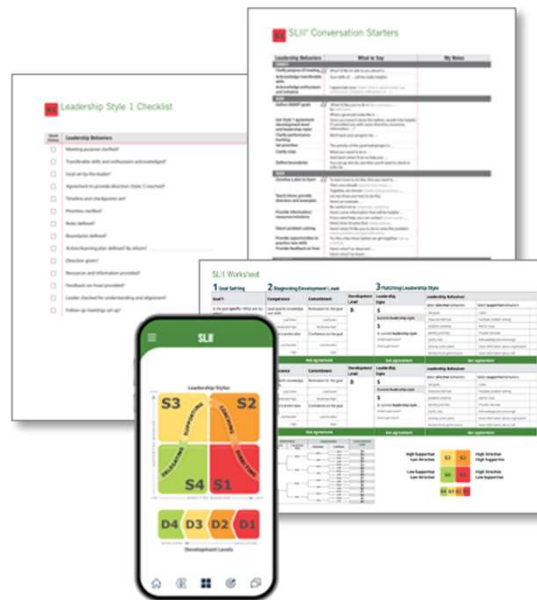
## Week 1

Teach others SLII



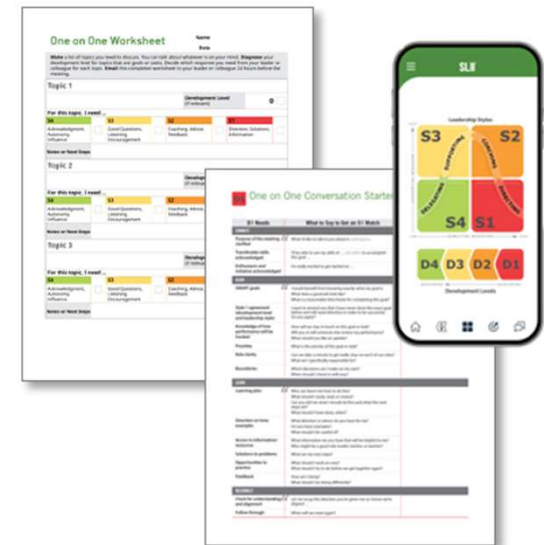
## Week 2

Practice using SLII with a team member



## Week 3

Schedule and conduct One on One Conversations



## SLII App

- SLII App - a primary learner support tool after the workshop
- Instrument to diagnose development levels on the fly and prepare for a conversation with a team member.
- Includes options such as: Goal Setting, One on One Conversations, and Videos
- Available in multiple languages



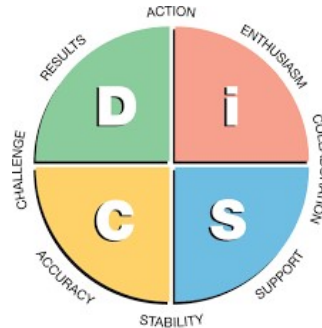


WILEY



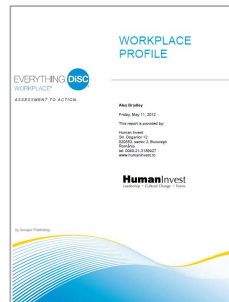
# Everything DiSC Workplace

This workshop helps participants to know themselves better and at the same time to be aware of the different priorities, preferences and values that each person brings to the workplace. With personalized strategies participants learn how to adapt to each other's style, leading to increased engagement and collaboration, with a positive influence on the quality of the workplace.



## Outcomes and competencies:

- Learn the DISC Model: Dominance, Influence, Steadiness, Consciousness;
- Understanding your personal communication style and personal approach;
- Understanding that there are differences between individuals looking at their motivations, needs, purposes, world view and working styles;
- Developing a set of communications abilities in order to obtain the desired result within the organization or team;
- Build More Effective Relationships. Learn how others have bridged their differences using DiSC®. Strategies for increasing their communication effectiveness.
- Improving the influencing skills by recognizing the needs and motivation of others.



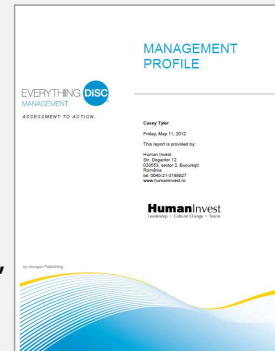
# Everything DiSC Management

Everything DiSC® Management offers a customizable development solution proven to increase the effectiveness of anyone in a management role - whether if they are managing their direct reports or the relationship with their own manager. By combining DiSC with personalized management insights, participants learn how to improve their management effectiveness in real-time.



## Outcomes and competencies:

- Learn the 4 basic management styles that people use Everything DiSC Management Map
- Understand the personal communication and management style: management priorities, management preferences, planning and organizing your own work
- Learn your style when managing your team: directing and delegating to the different styles, motivating different styles, developing your people
- Managing up - working with your manager to get results

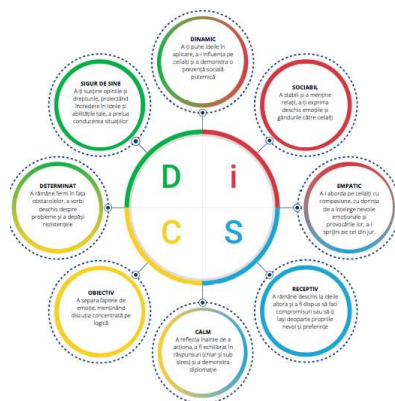
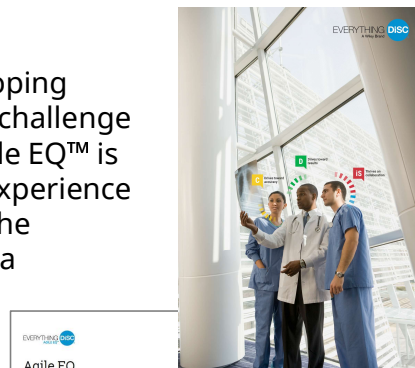


## Everything DiSC Agile EQ (Emotional Intelligence)

Being competitive today means developing your employees to adapt to each new challenge in real time. The Everything DiSC® Agile EQ™ is a training and personalized learning experience that teaches participants to interpret the emotional and interpersonal needs of a situation and respond accordingly.

### Outcomes and competencies:

- Explore and build an Agile EQ mindset that can best serve their bigger purpose.
- Have a better understanding of the different agile EQ mindset , recognize them amongst colleagues and hence support them to maximize their strengths.
- Work on an Action Plan to grow the mindset that naturally takes the most effort from them and find ways how to stretch past and expand the natural limits.

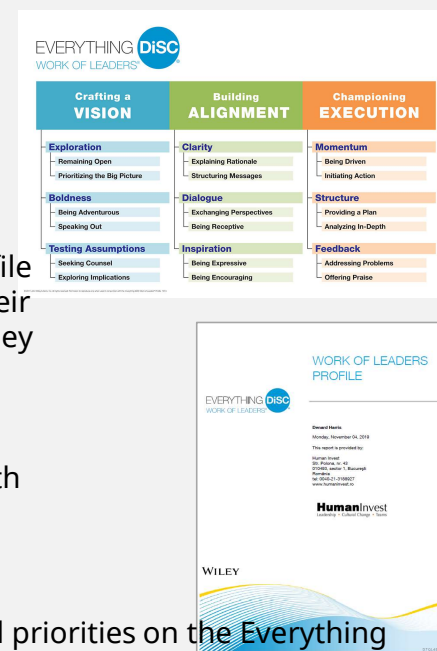


## Work of Leaders

Using the framework of Vision, Alignment, and Execution, the Everything DiSC Work of Leaders Profile encourages leaders to understand their own leadership behaviors and how they impact their effectiveness. Work of Leaders connects to real-world demands, generating powerful conversations that provide a clear path for action.

### Outcomes and competencies:

- Discover your leadership style and priorities on the Everything DiSC Leadership Map;
- Find ways to adapt your natural style to be more effective with everyone looking to you for leadership;
- Learn and understand the three fundamental responsibilities of every leader:
  - How to craft a Vision: imagine a future your organization can help make a reality
  - How to create Alignment: get everyone to understand and commit to the shared vision
- How to champion Execution: ensure the conditions are present to turn the vision into reality.
- Learn about your strengths and challenges as a leader.





# Take your organization from survive to **thrive**.

**GET CERTIFIED!**





EVERYTHING **DiSC**  
A Wiley Brand

# Be the reason someone **loves** their job again.

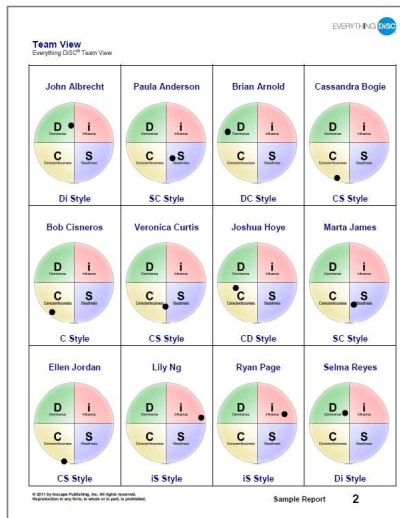
**GET CERTIFIED!**



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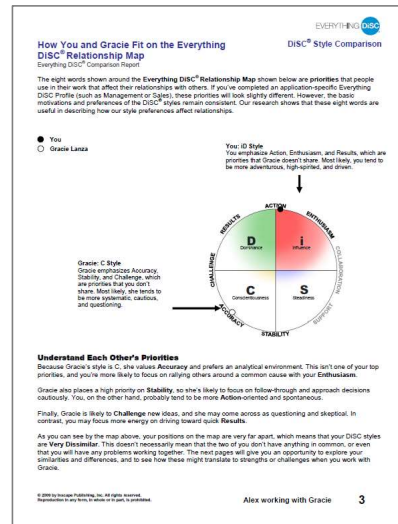
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# Additional tools that can be used in facilitation



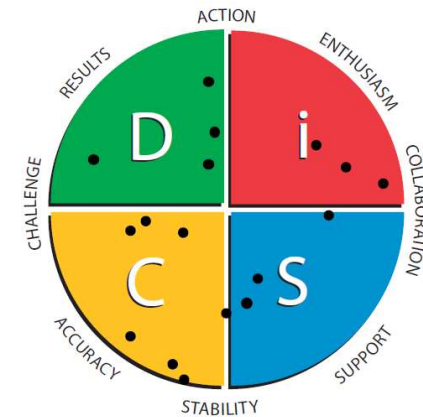
## Everything DiSC® Team View\*

An at-a-glance view of an unlimited number of respondents and their individual Everything DiSC maps.



## Everything DiSC® Comparison Report\*

Ideal for individual coaching or small group work. Insightful and robust 10-page research-validated reports can be created for any two participants—even people who have taken different Everything DiSC profiles. Reports illustrate their similarities and differences, potential roadblocks in working together, and practical tips for improving working relationships between colleagues



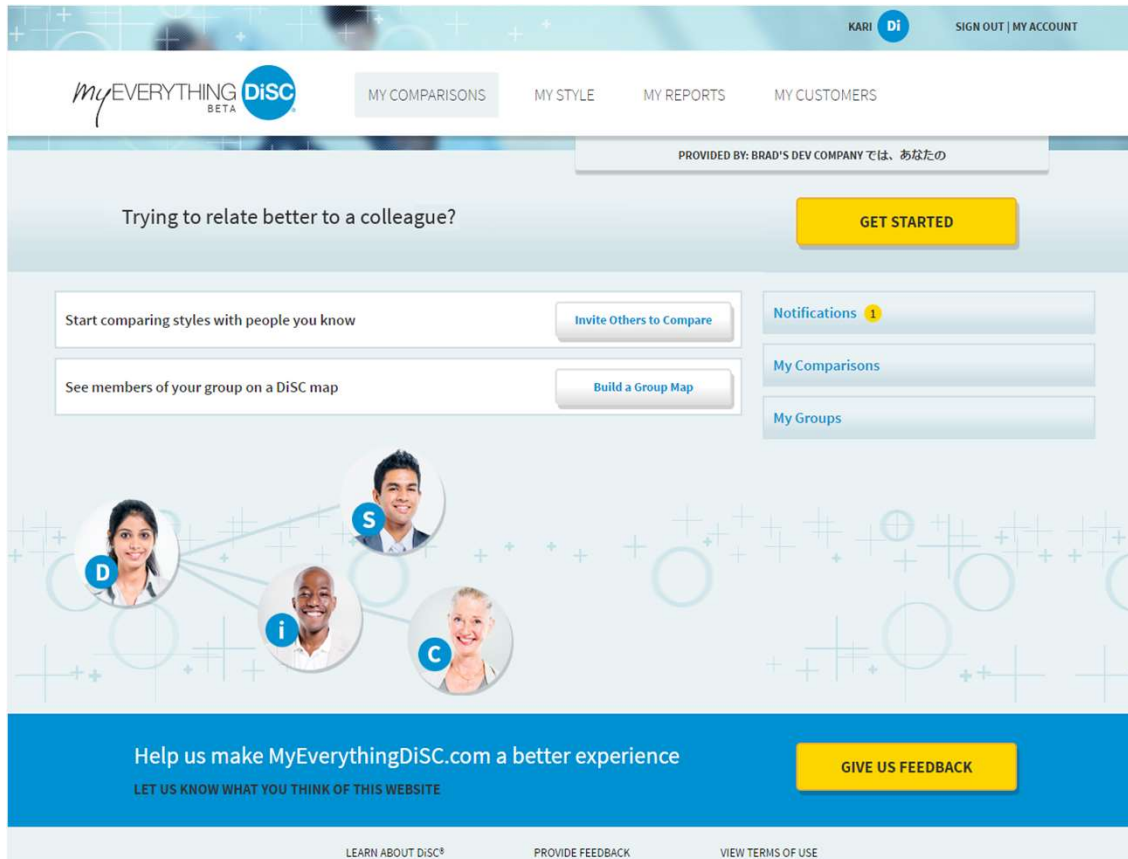
## Everything DiSC® Group Culture Report

Examines the DiSC culture of a group, exploring the advantages and disadvantages of each style, its influence on decision making and risk taking, and its effect on group members individually—based on different DiSC styles.

*Can be purchased separately.*

\*Unlimited access with all Everything DiSC profiles.

# Online platform: MyEverythingDiSC



Online platform available as a follow-up after the training that includes:

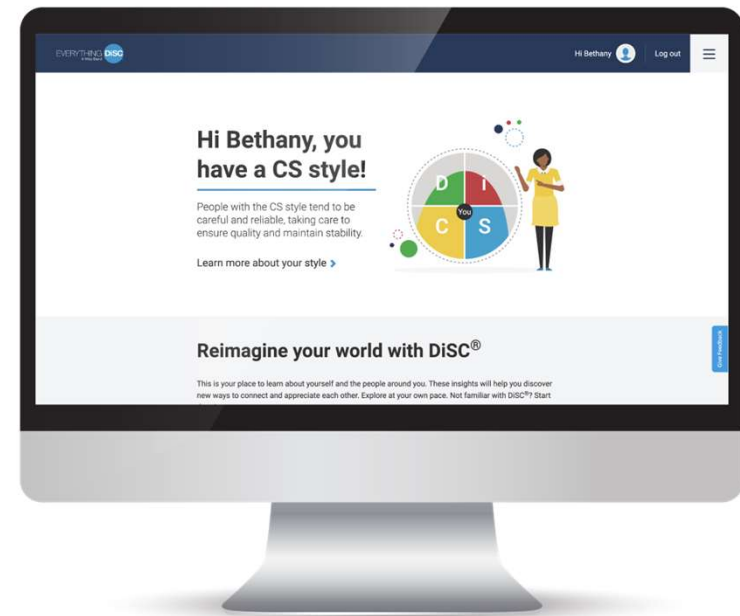
- Information about other styles to sustain learning after class
- Podcasts about your communication style
- Guidelines and specific ideas on how to approach and interact with others
- Option to invite others\* for comparison reports (\*available for people who have an Everything DiSC profile)

# Online platform: Catalyst™

Learning platform that makes reinforcement and practice possible.

## LEARNERS WILL:

- Discover and use personalized DiSC insights
- Better engage with colleagues using real-time tips
- Adapt behavior within their daily work lives

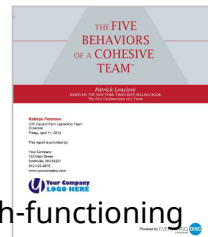


# Five Behaviors of a Cohesive Team

The Five Behaviors of a Cohesive Team™ is a learning experience that helps people discover what it takes to build a high-performing team. Bringing together everyone's personalities and preferences to develop a cohesive, productive team takes work, but the payoff can be huge—for your people, the team, and the organization.



The Five Behaviors of a Cohesive Team™ Model

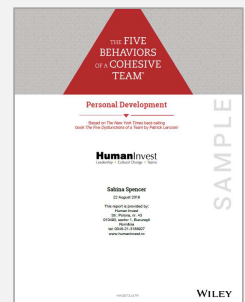
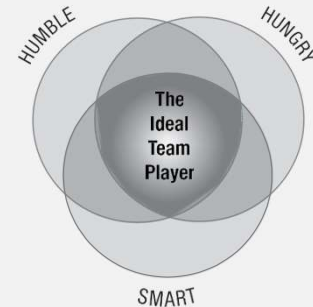


## Outcomes and competencies:

- Understand the characteristics of productive, high-functioning teams; learn the 5 behaviors behind a cohesive team model: trust, conflict, commitment, accountability, and results;
- Discover how your own DiSC® style influence the behaviors in building the team;
- Understand how trust, conflict, commitment, accountability and focusing on results impacts team productivity; explore how team members' DiSC® styles affect their approach to these key areas;
- Find specific actions and strategies to include in the team action plan where the respective areas were identified as priorities;
- Have a clear view on what it takes to build a truly cohesive and effective team in the most approachable, competent, and effective way possible.
- Team work and team development.

# The Ideal Team Player

In the modern workplace, team members must navigate an environment that is constantly changing, and they must be flexible and relationship-savvy to navigate these everyday challenges. The Five Behaviors® Personal Development can be your solution for building effective teamwork within your organization.



## Outcomes and competencies:

- Understand the characteristics of productive, high-functioning teams; learn the 5 behaviors behind a cohesive team model: trust, conflict, commitment, accountability, and results;
- Understand, internalize, and apply the principles of The Five Behaviors model and to foster communication that can be used throughout an organization.
- Understand how trust, conflict, commitment, accountability and focusing on results impacts team productivity;
- Find specific actions and strategies to include in the team action plan where the respective areas were identified as priorities.
- Proactivity and responsibility.





# **Certify Your Expertise:**

Transform Teams with  
**The Five Behaviors® Certification**



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# Explore The Five Behaviors® Certification:



**Professional  
Credential**



**Depth of  
Knowledge**



**Organizational  
Impact**





**MOJO MOMENTS®**

# Mastering Motivation & Mastering Motivation with Others

## Mastering Motivation™

Learning experiences and tools for people leaders and individuals

What do these outcomes have in common?

- Engagement and work passion
- Adjusting to new working conditions
- Achieving goals
- Sustaining high performance
- Adapting to change
- Creativity and innovation
- Sensitivity to DEI
- Resilience

**Motivation**

Motivation is at the heart of everything people do — and don't do. But not all motivation is created equal.

People need optimal motivation and vitality to embrace change, achieve results, and sustain high performance.

Take advantage of groundbreaking motivation science

Our Mastering Motivation learning experiences provide the alternative to ineffective carrots and sticks, personality-based "motivation," and obsolete command-and-control approaches to leadership.

Based on breakthrough science, leaders at all levels learn how to generate optimal motivation by creating choice, connection, and competence.

**CHOICE**

**CONNECTION**

**COMPETENCE**

**MOJO MOMENTS™**

Turning Leadership Insight-out

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**“We have the greatest opportunity, perhaps in history, to transform the way we lead—to create a workplace where producing results doesn't compromise people's health and well-being.”**

*Susan Fowler, Why Motivating People Doesn't Work... and What Does*

## RETHINKING LEADERSHIP: MASTERING MOTIVATION WITH OTHERS™

People cite three reasons for resigning and quiet quitting, according to a global study: the lack of autonomy and flexibility, to escape a toxic culture and meaningless work, and a desire for growth and learning opportunities.<sup>1</sup>

Isn't it fascinating that what people long for perfectly aligns with motivation science? For people to experience optimal motivation and thrive at work, they need to fulfill their psychological needs for choice, connection, and competence.

The good news is that Mastering Motivation with Others presents three scientifically proven capacities to promote people's psychological needs and the optimal motivation that leads to results and flourishing.

### LEADERSHIP CAPACITIES THAT PROMOTE OPTIMAL MOTIVATION IN OTHERS

**ENCOURAGE CHOICE (Autonomy)**  
Help people realize that they always have choices, have options within boundaries, and are the source of their actions.

**DEEPEN CONNECTION (Relatedness)**  
Help people feel a sense of belonging and genuine connection to others without concerns about ulterior motives, align goals and actions to meaningful values and a sense of purpose, and contribute to something greater than themselves.

**BUILD COMPETENCE**  
Help people feel effective at managing everyday situations, demonstrate skill over time, and experience growth and learning.

**CHOICE**

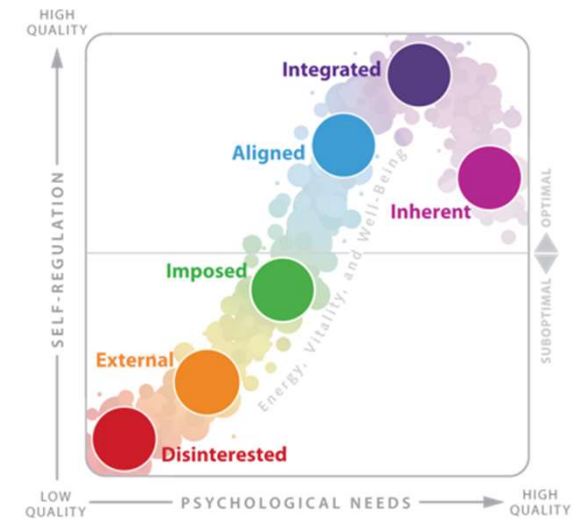
**CONNECTION**

**COMPETENCE**

1. De Smet, Aaron, Bonnie Dowling, Bryan Hancock, Bill Schermer: The Great Attrition is making hiring harder. Are you searching the right talent pools? HRMagazine.com, July 15, 2022.

**A MOJO MOMENTS® Learning Experience**

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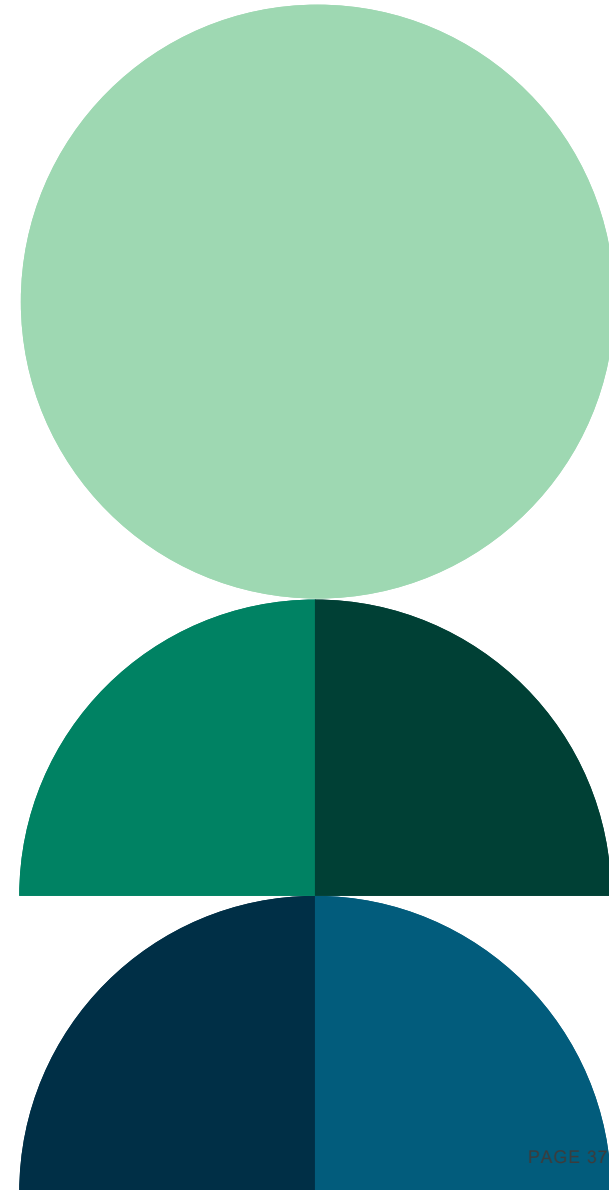
**MOJO MOMENTS®**

**HumanInvest**  
Leadership • Cultural Change • Teams

# Quality Learning Materials

## For Facilitators

**HumanInvest**  
Leadership • Cultural Change • Teams



SLII Experience - Facilitator Materials



In-Person designs

SLII® Two-Day In-Person

Day 1 Leader Notes

Activity—Soft Start

Materials:

Activity Time: 15 minutes prior to start of session

Slide Time: 15 minutes

PW Page: 3

Start/Stop Time:

Slide: 1

Facilitation Tip

Before the session, click through the PPT deck to load the slides and ensure all slide buttons are working properly and that you can play the video.

Facilitation Tip

If participants have not completed their LAUNCH assignments, ask them to work on them now or during the next break.

Tools for a team

Before the session, click through the PPT deck to load the slides and ensure all slide buttons are working properly and that you can play the video.

Facilitation Tip

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Tools for a team

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SLII®

Day 1

2. Learn a new

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Build

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5

3

SLII® Five-Session Virtual

Session 1 Training Design

Activity 1—Welcome

Tools: Chat

Activity Time: 17 minutes

Slide Time: 1.5 minutes

Front Cover

Start/Stop Time:

Slide: 2

Virtual Session 1

NOTE: There are two **breakouts** (one is optional) and **four videos** in Session 1. Virtual learning tools vary from platform to platform. Be sure to explore the tools you have available and substitute those tools for the ones we recommend if necessary. Encourage participants to log in 15 minutes early for Session 1 to resolve technology challenges and to learn platform tools.

SLII® Five-Session Virtual

Producer Guide

SLII® Five-Session Virtual Producer Guide

Virtual Platform Capabilities Required

These sessions rely on a variety of virtual platform functionalities.

- PowerPoint animations
- Audio and video streaming
- Breakout sessions
- Text chat, including private (paired) text chat
- Annotation tools, such as text and pointer for participants to use on the screen/PowerPoint slides
- Feedback/status tools, such as raise hand, green check/yes, and red X/no
- Video cameras
- Screen sharing and whiteboards in breakout

Tools vary depending on the virtual platform you use. If your virtual platform does not include all the capabilities listed above, or includes additional capabilities that you are comfortable using, work with the facilitator to revise the activities and/or adjust your instructions to the participants.

Session Setup

- Ensure permissions are properly set for attendees.
- Display the first slide at least 15 minutes prior to the start of the session.
- Be prepared to take control to play audio clips and/or video and/or start breakout sessions if your virtual platform does not allow for multiple hosts/presenters.
- Look for the best opportunity to ensure that participants have audio in and out, whether via VoIP/computer audio or phone.
- Be prepared to the annotate to by the facilitator.
- Be prepared to capture question dots lines for readability.
- Ensure that the session materials are visible to all participants.
- Support the facilitator in using annotation tools, and **facilitate the session/design**. Do not platform tools.

Broadcast Message Directions

1. Copy the entire set of instructions
2. Paste the instructions into the Be
3. Change any XOs to the number
4. Choose "Send to All Attendees"
5. Click "Send"

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SLII®

Session 1

2. Learn a new

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3

# Blanchard Management Essentials

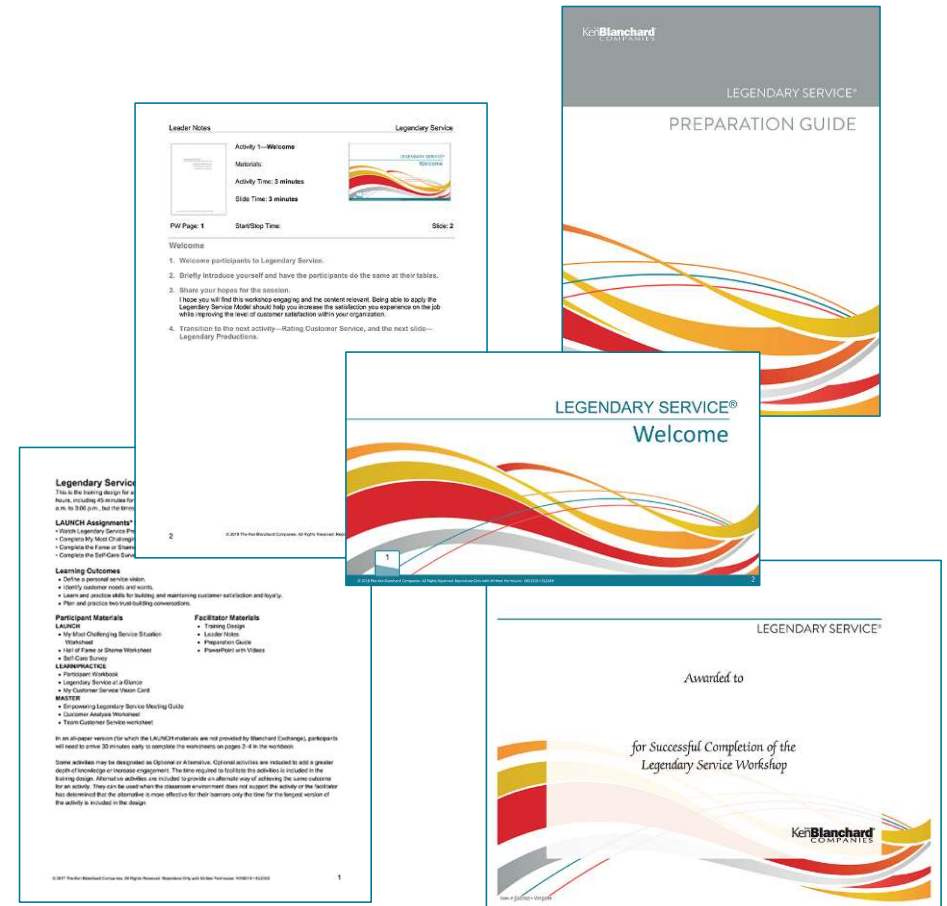
- ✓ Simple-to-follow instructional design
- ✓ Informative Leader Notes with editable format for adding notes
- ✓ Session Preparation Guide
- ✓ Key content conveyed through videos and slides

**HumanInvest**  
Leadership • Cultural Change • Teams



# Legendary Service - Facilitation Materials

- Preparation Guide
- Virtual Producer Guide
- Training Designs—In-person and Virtual
- Leader Notes—In-person and Virtual
- PPTs with Embedded Videos
- Certificates of Completion



## Coaching Essentials – Facilitation Materials



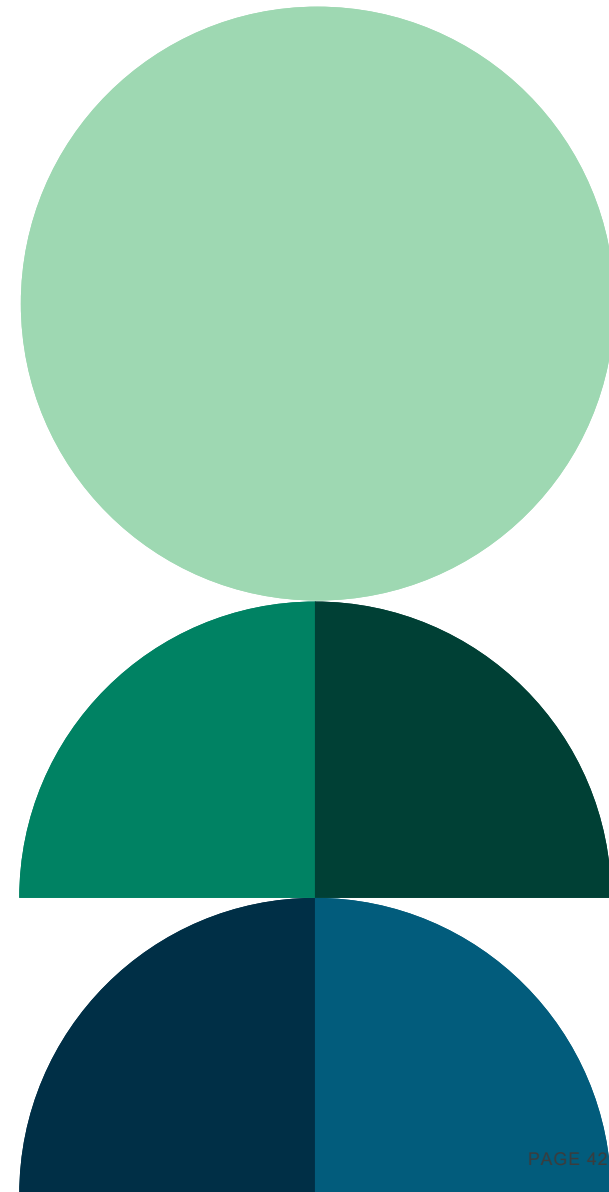
- Simple-to-follow instructional design
- Informative Leader Notes with editable format for adding notes
- Session Preparation Guide
- Key content conveyed through videos and slides



# Quality Learning Materials

## For Participants

**HumanInvest**  
Leadership • Cultural Change • Teams



SLII Experience - Participant Materials

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SLII®

Regression Conversation Starters

Steps	What to Say	My Notes
FOCUS the conversation Tell your team member what you want to talk about.	Here's what I want to talk about... (the goal where there is regression from D4 to D3, and potentially to D2).	
SHARE your observations Share the changes you've observed. Describe the gap between past and present behaviors and the impact the change has had on others.	I've observed... (changes in results, behaviors, and attitudes). In the past, you have... but now you... Your actions, behaviors, words are impacting...	
EXPLORE causes		

SLII Worksheet

1 Goal Setting

2 Diagnosing Development Level

3 Matching Leadership Style

AT A GLANCE

SLII®

Development Level Dashboard

Option 1: Diagnose multiple team members' development levels on common goals.

- Set up to three goals.
- List team members' names.
- Diagnose each team member's development level for each goal.

Goal	D1	D2	D3	D4

SLII® At a Glance

The First Skill of SLII: Goal Setting

Collaboratively aligning on what needs to be done, by when

Specifics  
What does a good job look like?  
Prioritizing  
Is it meaningful to the individual?  
Achievable  
Is it realistic and aligned with organizational goals?  
Relevant  
Is it important and aligned with organizational goals?  
Trackable  
How will progress be tracked?

The Second Skill of SLII: Diagnosing

Collaboratively assessing an individual's competence and commitment on a specific goal

D4 Self-Reliant Achiever

D3 Capable, but Cautious, Contributor

D2 Disillusioned Learner

D1 Enthusiastic Beginner

LEADER BEHAVIOR ANALYSIS II®

LEAD SELF REPORT

Learn the SLII Model

Complete this module to learn about how you and your leader can use SLII® to help you become more successful at work.

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## Blanchard Management Essentials (First-Time Manager) – Participant Materials



Participant  
Workbook



At a Glance  
job aid



Engaging  
videos



Live-action and  
animated  
videos

# Coaching Essentials – Participant Materials

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CONNECTING SLII® WITH

COACHING

ESSENTIALS®

A Guide to Using Coaching Skills  
and the Coaching Process with SLII®



Coaching Checklist

RESET PAGE

Think about your natural tendencies as you look at the checklist below.

STATEMENTS	Strongly Agree
The Mind-set	
1. I am a role model for behaviors I expect from others.	<input type="checkbox"/>
2. I behave in ways that serve and develop others.	<input type="checkbox"/>
3. I believe that developing others is as important as achieving goals.	<input type="checkbox"/>
The Coaching Process	
4. I spend time building positive relationships with others.	<input type="checkbox"/>
5. I ask others what is most important to discuss.	<input type="checkbox"/>
6. I keep meetings focused on the topic at hand.	<input type="checkbox"/>
7. I collaborate with others to determine the best course of action.	<input type="checkbox"/>
8. I encourage people to take deliberate actions.	<input type="checkbox"/>
9. I ask for a summary of the discussion and agreements at the end of meetings.	<input type="checkbox"/>
10. I encourage people to decide on next steps and set clear agreements.	<input type="checkbox"/>
The Essential Skills	
11. I am alert and focused.	<input type="checkbox"/>
12. I listen more than I talk.	<input type="checkbox"/>
13. I avoid distraction.	<input type="checkbox"/>
14. I summarize what I hear.	<input type="checkbox"/>
15. I ask purposeful questions.	<input type="checkbox"/>
16. I encourage people to take action.	<input type="checkbox"/>
17. I am willing to let go of my own ideas.	<input type="checkbox"/>
18. I share useful information.	<input type="checkbox"/>
19. I acknowledge and affirm others.	<input type="checkbox"/>
20. I express confidence in others.	<input type="checkbox"/>

Coaching Conversation Guide

RESET PAGE

**Before**

**Focus:**

- Consider your intent for the conversation and the desired impact
- Example: How can I be of service?

**During**

**Connect: Build trust and positive relationships**

☐ Greet the person ☐ Express interest in the person ☐ Show that you care

Example: Am I interested and do I care?

**Focus: Identify topics and goals**

☐ Set the context for the conversation ☐ Narrow down and discuss the key focus area(s) ☐ Confirm priorities

Example: Did we confirm the specific focus?

**Activate: Collaborate to develop a plan for action**

☐ Gather ideas from the person and consider options ☐ Prioritize action steps ☐ Specify what is needed to move forward

Example: Did we identify the specific actions to be taken?

**Review: Clarify agreements and discuss accountability**

☐ Ask for a recap of actions and commitments ☐ Confirm timelines, including follow-up meetings ☐ Reflect on what was learned or useful

Example: Are there clear agreements that include timelines?

**After**

**Reflect:**

- Identify what you learned that will be useful moving forward
- If your intent and impact were different, take action to make corrections

Example: How will I make future conversations more effective?

Coaching in the Workplace

RESET PAGE

Identify two workplace situations or conversations in which coaching may be useful. Refer to the examples on the side.

**Situation 1**

Briefly describe the situation

Goal for the conversation

**Situation 2**

Briefly describe the situation

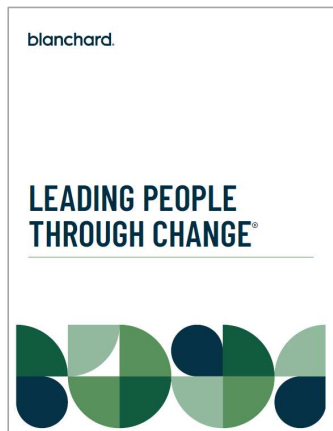
Goal for the conversation

Coaching Situation Ideas

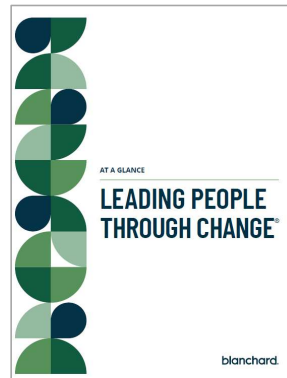
- Presenting new development opportunity or goal
- Sharing important feedback on performance
- Improving self-confidence
- Prioritizing competing projects or tasks
- Managing a change initiative
- Improving upon an item from the Coaching Checklist



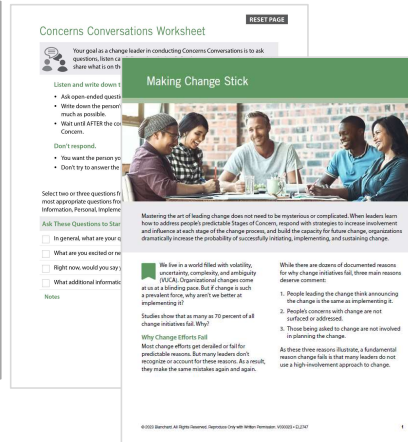
# Leading People through Change – Participant Materials



Participant workbook



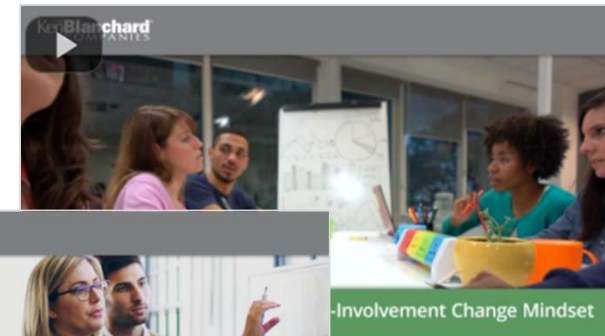
At a glance



Worksheets



Presentation slides



Videos

# Legendary Service - Participant Materials

LAUNCH WORKSHEET

Hall of Shame or Fame Worksheet

In the hearts of  
People tell the

Hall of Shame  
Think about the  
have had. Recall  
and answer the  
What did they  
Impression?

Example: Treat

How did they  
Example: Unimp

What metrics c

LAUNCH WORKSHEET

My Challenging Situations Worksheet

Take several

Situation  
Describe a cu  
the customer

Situation  
Describe a co  
your organiz  
the way you i

LAUNCH WORKSHEET

Self-Care Worksheet

Rate the li  
I = really i

1. Heal  
2. Soci  
3. Fina  
4. Wor  
5. Tim  
6. Dev  
7. Can  
8. Emo  
9. Rec  
10. Spri  
11. Purp  
12. Envi

From look  
To be man

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LEGENDARY SERVICE®

AT A GLANCE

LEGENDARY SERVICE®

Legendary Service®

Consistently behaving in a way that builds  
customer satisfaction and loyalty

Attentive

- Be present and other-focused
- Draw out information
- Confirm what you heard

Listening  
to identify  
needs and  
wants

Responsive

- Acknowledge feelings
- Offer solutions and gain agree
- Express appreciation

Taking action  
that shows  
you care

Unleashing  
the full extent  
of your power

Empowered

- Practice self-care
- Use your power
- Champion innovation

The Key Is  
to Care

Living  
your customer  
service vision

Committed

- Identify your customers
- Align your beliefs, vision,  
and values
- Measure your impact

Customer Analysis

Customer/segment:  
Needs and wants:

Empowering Legendary Service®

Track your progress and partner with your leader to empower Legendary Service in your  
organization.

Service Goals and Metrics

Progress:

The obstacles I encounter:

Innovation Suggestions

Customer Success Story

Self-Care

Personal self-care

Committed to Customers Self-Survey

Rate yourself on each of these statements.

1 = Almost Never  
5 = Almost Always

1. I understand the impact of poor service on my organization.

2. I act on my belief that service is important.

3. I perform my tasks with my customer in mind.

4. I have developed goals and metrics for providing great customer service.

5. I live my Customer Service Vision on a daily basis.

Action Items

Share your customer service vision statement with your internal and external customers.

Post your customer service vision in your work space.

Share your customer service vision statement with your leader and team members.

Research your competitor's customer service ratings.

Keep your beliefs about serving your customers in mind, especially in challenging situations.

Treat customers the way they want to be treated.

Perform tasks with customers in mind.

Use your skills to serve at every opportunity.

With customers, colleagues, and partners to improve how we do business.

In, division, and company by attending organizational events: town halls,  
your performance.


My Customer Service Vision Statement

My Customer Service Vision is to use my (1) \_\_\_\_\_ and  
(2) \_\_\_\_\_ to (3) \_\_\_\_\_  
and (4) \_\_\_\_\_ my customers,  
so they (5) \_\_\_\_\_



# Learn the SLII Model module for teaching others

## Goal Setting




The first skill of SLII is **Goal Setting**—aligning on what needs to be done, by when.

### Identifying Goals

Want to excel at work? Then you need to have clear goals. It's a trait all successful people share.

Goal Setting is so important that it's the first step in SLII. Make goal setting an enriching conversation between you and your leader. And remember that goals come in all shapes and sizes—from outcomes or results to tasks or activities.



Section 2 of 5  
Learn the SLII Model

## Diagnosing



The second skill of SLII is **Diagnosing**—collaboratively assessing your competence and commitment on a specific goal.

### Understanding Your Needs


If you want your leader's help, you first have to understand your competence and commitment on the goal. That's the purpose of Diagnosing.

After you diagnose your competence and commitment on the goal, you will understand exactly what you need. And your leader will know the right leadership style to use to



Section 3 of 5  
Learn the SLII Model


## Matching



The third skill of SLII is **Matching**—using a variety of leadership styles, comfortably, to provide you with what you need.

### Getting What You Need

You have clear goals. And you've diagnosed your competence and commitment on a specific one. Now your leader can match their leadership style to your development level on that goal.



Section 4 of 5  
Learn the SLII Model