



PROFESSIONAL DEVELOPMENT SERIES

A MULTI-YEAR, QUARTERLY 1 DAY TRAINING EXPERIENCE FOR IMPROVING
THE LEADERSHIP PERFORMANCE OF MANAGERS & HIGH POTENTIALS

Need and Topics Defined by Vistage Members

The Professional Development Series (PDS) training program was designed in response to a request from a group of Vistage <www.vistage.com> members, a CEO peer advisory group, who recognized the need to provide ongoing support and development for their senior executives, mid-level and first time managers and supervisors. Vistage members realized that the success of their company depends in large measure on these new leaders who have deep technical knowledge and experience, most likely received “battlefield promotions,” but have limited preparation or training to be successful in leadership and management positions.

An initial list of topics were identified by Vistage members with priorities defined for the multiple years to be delivered in a one day quarterly format that allows for both education, application and accountability. A listing of PDS’ first, second and third year topics begins on page 4. The following sections highlight the focus, approach, benefits, relevance, support and approach of the PDS program.

Emphasis on Leadership and Emotional Intelligence (EQ):

Throughout the PDS a primary focus is to develop in participants an appreciation of Daniel Goleman’s insights from his Harvard Business Review article on Emotional Intelligence, *What Makes A Leader*:

“IQ and technical skills ... do matter, but mainly as “threshold capabilities” ... entry-level requirements for executive positions ... But research shows that emotional intelligence is the sine qua non of leadership. Without it, a person can have the best training in the world, an incisive, analytical mind, and an endless supply of smart ideas, but he still won’t make a great leader.”

The PDS begins with and emphasizes throughout the:

- Importance of effective leadership as a set of skills that can be developed,
- Ways in which leadership differs and complements management authority, and,
- Challenges and benefits of balancing maintaining one’s authority while still eliciting collaboration from direct reports, peers, and upper management.



Throughout the various PDS sessions we repeatedly highlight the importance of self awareness and self management, and awareness and understanding of others in order to influence people constructively and to produce the best results

Discovery Learning & Application to Real Life Situations

The PDS does not follow the stereotypical curriculum approach of “telling them what we are going to tell them, tell them, and then tell them what we told them,” or creating fictitious role play situations or games. Content has been carefully developed by PDS trainers over many years through experience with thousands of participants that encourages the discovery or awakening of a concept within the mind of the participant, thereby increasing both ownership and comprehension. Participants are facilitated to use real work situations to apply what they are learning. The program’s worksheets, discussions and activities guide participants to focus on how to apply a specific model or technique to a specific work situation and to plan for addressing similar situations in the future.

Learning and Feedback from Other Participants

It is assumed in the PDS that the most important learning a participant receives may not come from the trainers, but from another participant in the class. Participants learn to benefit from each another’s experience, which can transfer to greater ability to learn from their co-workers in general as well. The PDS ensures participants have exposure to supervisors from different companies, and different levels of management experience. Each program ends with employees from the same company having time to debrief how they plan on using what they’ve learned in their work together as well as what they will communicate with their own manager.

Connected to Performance and Involving Participant Supervisors

PDS assumes everything participants learn should be directly connected to their performance management expectations. Too often employees go to a training, are exposed to ideas and techniques, and then put the manual on the shelf and forget it all. To connect training experience to performance management the PDS process includes the following vital steps:

1. An email is sent to each person’s direct supervisor, encouraging a meeting before each training to discuss performance expectations related to the current topic (delegation, decision making, communication etc.). An email is also sent to each participant encouraging them to make sure this meeting with their supervisor happens.
2. Each session begins with participants reviewing their own and their supervisor’s expectations.
3. Each session ends with time for participants to think about what they’ve learned, and how they will link it to their supervisor’s expectations.
4. Participants are asked to meet with their supervisor sometime within the next two weeks following each session to review what they learned, discuss how this meets previously defined expectations, and to explore in what way this should reflect on the participant’s annual performance/development plan.



Individual Coaching: After every session each participant has a one-on-one coaching session with RI's Trainers, who have been developing leaders for 40 years in a wide range of industries, government and healthcare. Trainer/Coach profiles available at: <http://www.resource-i.com/PDFs/RIProfiles2018.pdf>

Participant Selection and Commitment: Each participating organization identifies an executive sponsor of the PDS program who facilitates the selection of PDS participants based on the strategic development needs of the individual company. Each year companies commit to: (1) 4 quarterly sessions for each identified participant, and, (2) agree to support a before/after development meeting between participants and their immediate supervisors each quarter relating the programs' topic to development needs.

Training Materials: Training manuals are provided for each session. A private password-protected webpage is available for program participants with links to all PDS resources, techniques and methodologies presented, including worksheets, templates, handouts, recommended articles, audio/video and pre/post reading assignments for all participants to access anytime over the Internet.

Annual Participant Survey: An initial anonymous online survey engages all new participants in providing input on their needs and objectives relevant to the identified topics being presented. Whenever employees are required to attend a new training, being able to express their concerns in order to influence what is addressed simultaneously increases motivation while reducing any resistance to full participation.

Fees: \$2000/participant paid at the beginning of the year to cover:

1. Trainer fees
2. Annual participant survey and summary report
3. All participant training materials, e.g., binders, handouts, worksheets, articles, audios/videos and articles
4. Online and paper/pencil assessments
5. Dedicated program webpage
6. Catering: breakfast, lunch and afternoon refreshments.
7. Individual Coaching sessions with RI Trainers following each PDS Session.

Topic Descriptions for each of the twelve PDS programs in 2023 follow on pages 4-5.



QUARTERLY PDS TOPICS FOR 2023

FIRST YEAR TOPICS

Feb 16 - What Makes A Leader / Motivating Others / Coaching for Development

Understand the difference between coaching employees to develop competencies and managing performance to achieve business objectives. Gain insight into ways to balance one's authority to make decisions with a process of collaboration for increased employee engagement and ownership by knowing how and when to facilitate disagreement and when to acknowledge risks.

Apr 20 - Effective Delegation

Participants follow a model to: Decide what to do and what to delegate / Identify what information to provide / Determine who has the skills, and resources to contribute to the task / Fit the assignment into an employee's other priorities / Establish feedback channels for reporting & monitoring progress.

July 20 - Understanding Financial Information and Decision-Making

Participants discover: how their company/division makes money and how this is reflected in the P&L, Balance sheet, and Cash Flows; how their performance impacts the overall financial outcomes, how to use numbers to make decisions; what key financial metrics to watch; and how to present recommendations with financial support.

Oct 19 - Accountability & Driving for Results

Participants learn how to establish a positive work environment to motivate employees to deliver agreed upon results. Course covers how to set performance goals, monitor performance, redirect off-task behaviors, and give constructive feedback, aligning productive behaviors with personal and professional goals.

SECOND YEAR TOPICS

Feb 23 - Team Decision Making - Balancing Authority & Collaboration

How to involve employees and team members in the decision process without relinquishing authority. The resulting respect and cooperation reduces resistance and increases creativity.

May 18 - Critical Thinking & Decision Making

Understand how your department goals align with your organization's strategy. Develop strategies and tactics to make the most effective decisions that achieve goals at any level of the business.

Aug 17 - Dealing With Difficult Customers, Exceeding Customer Expectations

Be able to anticipate customer needs, resolve complaints and objections quickly, gain greater customer confidence and satisfaction and end every encounter on a positive note.

Nov 16 - Productivity and Continuous Improvement

Know how to choose the right metrics to measure what you should, not just what you can, in order to provide the most relevant feedback necessary to gauge progress and success on milestones and goals.



THIRD YEAR TOPICS

Mar 16 - Managing Time, Tasks & Priorities

Manage your time around activities that help you achieve your most important values and personal and professional priorities.

Know how to focus your time on priorities of greater urgency and importance, and how to choose which tasks and responsibilities to delegate.

Jun 15 - Turn Emotional Conflicts Into Success

Stand firmly for your viewpoint while providing support and understanding for others. Provide productive feedback without blame that leads to productive results. Use a 6 stage process to develop the skill of timing – when to listen, when to speak, how to reach consensus when possible and, when disagreements exist, how to build agreements that everyone will support.

Sept 21 - Build a High Performance Culture

Participants explore current behaviors that support company values and those that need to be developed and selecting one to develop as a habit. As leaders, processes are presented for establishing productive behaviors, redirecting off-task behaviors and correcting unproductive behaviors.

Dec 14 - Build High Functioning Teams

(Authorized Partners of 5 Behaviors of a Cohesive Team). Participants learn the importance of building a culture in which productive conflict and trust co-exist, and how both are required to produce accountability and results. Each of the five behaviors highlights an essential function within an effective team, each one building upon the other. Failure to develop one function, such as trust, would not only hinder accomplishing productive conflict but would negatively impact all those functions that follow such as clarity, accountability and expected results.

Common themes repeatedly addressed throughout multiple topics include:

- How to earn respect and build trust.
- How to create a culture in which it is safe for employees to let managers know when there is a problem or they don't know or understand something, without them feeling judged negatively.
- The challenges of being an objective authority figure and being friendly.
- How to communicate empathy and still maintain expectations.
- How to respond to people who are defensive and resistance.
- How to keep people on task without being disrespectful.
- How to respond constructively when others are defensive as a result of receiving challenging feedback.
- Know when to take action and when to consult an authority figure for input.

Additional RI Resources

Overviews of RI principles and approaches to leadership and team development along with executive coaching with video testimonials from RI clients are available at:

http://www.resource-i.com/leadership_development.html

<http://www.resource-i.com/teambuilding.html>

<http://www.resource-i.com/coaching.html>