

# SCALING UP BUSINESS TRAINING OUTLINE

The ultimate purpose of us working together is to help you achieve your professional and business goals.

The following steps outline how training is over 12 modules and 73 hours of instruction. For a more detailed explanation of each module please see **Appendix A**:

- **Two Day Training**: I will work with your leadership team to transfer the necessary skills and knowledge to develop your Grow Forward Plan.
- **Monthly Training**: I will work with your leadership team for a ½ day during these monthly training sessions.
- **Quarterly Training**: I will work with your leadership team for two full days during these quarterly training sessions.

Your program will consist of the following monthly investment:

- \$5,000 per participant
- Can be invoiced monthly for budgeting purposes and consistency.

## *Pricing, Terms & Conditions*

I extend two unconditional guarantees:

- 1) If you are not fully satisfied with your results, you can pay the amount of the invoice that you feel you have received as value to your company.
- 2) You may opt out of our agreement at any time.

The total training Hours will be 73 over the course of the 12 modules.

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Doug is a trainer and facilitation veteran, recognized as such on a world basis by Vistage/TEC. He's a certified Gazelles International trainer since 2015. In his strategic planning and team development workshops, Doug has demonstrated ability to draw the best planning teams creating intelligent and durable plans that will be implemented. Clients have reached billion dollar values.

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## Appendix A

All organizations run best when commitments are made in the following areas:

1. **Team:** Build your team's performance
2. **Direction:** Build a business model that is profitable and drives growth.
3. **Delivery:** Stay focused and implements all the critical elements of your strategy.
4. **Dollars:** Keep a strong cash flow to drive growth.
5. **Resources:** ensure the basics are secured to underpin growth.

We call these the "Catalyst Performance System".

In pursuit of your goals, we will first seek to identify them clearly and start to develop a Grow Forward Plan that will align your long-term business goals and the required short term actions.

As we develop the Grow Forward Plan, we will identify specific needs within your company related to Team, Delivery, Direction and Dollars. As opportunities for improvement arise, we will work together to transfer the necessary skills and knowledge to resolve the situation and maximize the opportunities. During this time, we will identify knowledge gaps and seek to fill them.

We will work together in the following way:

**Two Day Training:** This will be a two-day retreat for participating members of the leadership team based on the intellectual property of the Catalyst Performance system and includes individual and team exercises, resources and concepts. During the two days, we will work together to transfer the necessary skills and knowledge required to develop your Grow Forward Plan.

**Monthly Training:** These monthly, half day training sessions are designed to educate and move the leadership team forward with your "big rocks" and initiatives. We check in with each leader during the session and those who may be remote may join us via conference call or Skype. During these sessions we will also check up on the progress implementing training modules listed below to help build the leadership team's knowledge and capabilities.

**Quarterly Training:** These are full 2 day training sessions with your leadership team and will occur immediately after each quarter has been completed and we have up to date data. The intent is to look back and review the quarter with your big rocks and key initiatives. I will guide you in this process and each member of the leadership team will report how they did. We will identify what worked, what didn't and make the necessary adjustments for the next quarter. During these sessions we will also complete 3 of the 12 monthly training modules listed below to help build the leadership team's knowledge and capabilities.

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Training within The Scaling UP Program consists of 12 modules over 52 weeks. The start and end dates listed are tentative, and based on the start date of Module 1. If this date is altered for any reason, all the subsequent dates will change accordingly, with a similar amount of time spacing in between each Module maintained. Please note, this course is available on an ongoing basis. It will begin one month after grant approval.

Module	Description	Hours	Outcomes	Delivery	Assessment
1	Start Development of Grow Forward Plan	17	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn how the Five Stars (Direction, Team, Delivery, Dollars and Resources) create a foundation for business strategic planning.</li> <li>Have the knowledge to develop their Grow Forward Plan based on these Five Starpoints including 3 to 5 key thrusts for the next 3 years, 3 to 5 Objectives for the current fiscal year and 3 to 5 Rocks for the current quarter.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	Was the draft Grow Forward Plan completed with identified Key Thrusts, Yearly Objectives and Quarterly Rocks?
2	Direction - Drivers	4	<p>The team will</p> <ul style="list-style-type: none"> <li>Develop the Corporate History Chart to understand turning points and culture</li> <li>Analyse the business together coming to common ground as to which of 8 types of company they operate to ground strategy and template organization structure.</li> <li>Complete the biz model canvas to learn how the core elements add up to value creation for customers in the business.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to assess the critical shaping events of the culture and direction of the company?</p> <p>Can they describe the type of company they are and the impacts of that characterization?</p> <p>Did they understand the business model of the company and what contributes to it?</p>
3	Direction: Vision and Values	7	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn about and build together the Code - how to recognize values that are "alive" and contribute to organizational culture and growth.</li> <li>Learn how to describe the unique contributing factors that make for the effectiveness of business for customers, employees and communities.</li> <li>Learn and practice the development and execution of Foundations Projects that are in line with their Grow Forward Plan</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to identify and define the organizational code of values?</p> <p>If needed, were they able to create or redraft core values that match their vision for growth?</p> <p>Could they describe the company's differentiation?</p>

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4	Team: Talent Assessment	4	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn employee profile types (A, B, C).</li> <li>Learn and apply Strata concepts to organizational structure and positions</li> <li>Learn how matching profiles, job positions and work tasks can contribute to or detract from building the organization.</li> <li>Have the knowledge to evaluate the employees reporting to them as A, B or C players.</li> <li>Have the knowledge to place and hire employees more effectively in positions suited to their strengths.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to evaluate the relative capabilities of their team members and identify A, B, and C players?</p> <p>Were they able to identify areas of improvement in employee placement and/or hiring?</p>
5	Team: Role Accountability Chart	4	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn how to assess what are the critical functions within the organization that are critical for growth.</li> <li>Assess who is accountable for each critical function within the organization.</li> <li>Have the knowledge to identify and act on opportunities for improvement.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to determine who the accountable person is for each critical function identified?</p> <p>Were they able to identify opportunities for improvement?</p>
6	Dollars: Dollar Acceleration Strategies	7	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn about the Sale to Cash Cycle and how it impacts potential for organizational growth.</li> <li>Have the knowledge to evaluate the organization's Sale to Cash Cycle</li> <li>Have the knowledge to determine and execute the actions required to shorten it.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to define the Sale to Cash Cycle?</p> <p>Were they able to identify opportunities for improvement?</p>
7	Dollars: Power of One	4	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn how small changes (1%, 1 day) can drive more cash to the bottom line.</li> <li>Have the knowledge to review the income and expenses of the organization.</li> <li>Have the knowledge to recognize what small changes may have big impact on the organization's cash flow.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to identify the income and expense sources within the organization that could be small changes with big impact?</p>

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8	Delivery: Group to Team	4	<p>The team will</p> <ul style="list-style-type: none"> <li>Learn how interaction between the them is the hallmark of executive team performance</li> <li>Assess their culture of discussion and enhance it using Conversant concepts and the 10 laws of high collaboration</li> <li>Have the knowledge to determine and execute the actions required from this analysis.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to identify the value of interaction within an executive team</p> <p>Were they able to identify potential effects tenets of a culture of discussion that will build the organization?</p> <p>Were they able to determine potential actions required from this analysis?</p>
9	Delivery: Engaging the entire company	7	<p>The team will:</p> <ul style="list-style-type: none"> <li>Understand the importance and nature of Meeting Cadence for the company involving levels of the organization in learning, planning and execution actions to move the company forward</li> <li>Characterize quarterly drives to bring all staff into thrusts for corporate improvement</li> <li>Assess potential metrics to monitor and build real time information that all company members can be guided by</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to Identify and operate a Meeting Cadence to guide and engage the company?</p> <p>Could they build and operate a Quarterly Drive?</p> <p>Did they understand the concept of Metrics to Monitor?</p>
10	Direction: the Goal and the Program	4	<p>The team will:</p> <ul style="list-style-type: none"> <li>Assess the motivational and engagement power of goals with reference to the tier of company they aspire to</li> <li>Learn how to build a Program that will take the company there</li> <li>Translate this into the Grow Forward Plan framework to govern activity</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to Identify the organization's Goal and any shared actions needed to effectively move toward that?</p>
11		4	<p>The team will:</p> <ul style="list-style-type: none"> <li>Learn about pulling out Key Thrusts and Foundational Blocks to support strategic growth planning.</li> <li>Assess the importance and construction of Foundation Blocks to advance the Key Thrusts might be valuable for organizational growth for the next 3 to 5 years.</li> <li>Have the knowledge to identify and describe the key strategies that need to be executed over the next 3 to 5 years to meet organizational objectives.</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	<p>Was the team able to identify the key strategies that need to be executed over the next 3 to 5 years to meet organizational objectives?</p>

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Module	Description	Hours	Outcomes	Delivery	Assessment
12	Individual Plan: Priorities, KPIs and Milestones	7	The team will: <ul style="list-style-type: none"> <li>• Learn about matching individual Priorities to support strategic growth planning.</li> <li>• Learn how to use Metrics to Monitor and milestones in strategic growth planning.</li> <li>• Have the knowledge needed to develop individual Priorities, KPIs and Milestones for the upcoming fiscal year</li> </ul>	On site presentation, guided discussions, and worksheets for the team to complete	Was the team able to develop individual Priorities, Metrics to Monitor and Milestones for the upcoming fiscal year?
<b>Total Hours:</b>		<b>73</b>			