



Center for World-Changing Organizations

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Strengthening organizations that make the world better

# Catalog of Services and Training Courses



We specialize in helping organizations that make a difference in the world:

- **Design ingenious ways to accomplish their missions**—through our innovative approach to *strategic planning*.
- **Increase revenues and funding**—through *strategic marketing* designed for their unique financial challenges.
- **Create great places to work**—through *organizational development* tailored to their values-driven missions and unconventional staff.

We've written *eight leadership guides* on these subjects, which you can download at [www.wcorgs.com](http://www.wcorgs.com). They describe how we adapt *corporate* planning, marketing, and organizational development to meet the challenges these organizations face.

Our clients include local-to-global nonprofits, government agencies, and companies in the U.S. and abroad. As subject-matter experts with extensive consulting experience, we offer high return-on-investment consulting, training, and other services.

**JONATHAN REED, PH.D.**, the Center's founder, has an unusual background for a management consultant. He received his doctorate in the biological sciences at the University of Wisconsin—Madison, where he subsequently served as Lecturer and Honorary Fellow. His research took him far afield: 500 miles north of the Arctic Circle, four field seasons in Kauai, Hawaii, and to Panama as a Smithsonian Tropical Research Fellow.

He then founded The University Group in 1988, a private consulting firm representing 65 leading faculty at UW—Madison. It transferred the latest advances in management and technology from universities to corporations such as General Electric and Johnson Controls.

When clients began asking for his advice, he found he preferred consulting to trying to manage professors. So he started consulting for corporations, nonprofits, and government agencies on his own. One of his projects received a National Quality Award.

He has co-authored *A Systems Handbook: An Introduction to the Systems Age for GE Medical Systems*, consulted for federal Science Centers for seven consecutive years, and helped lead the Conservation Science Division of The Nature Conservancy.

He served as a consultant to the U.S. Agency for International Development in Afghanistan and the former Soviet Union Republic of Georgia, and the Inter-American Development Bank in Trinidad and Tobago. He also has taught mindfulness meditation at maximum-security prisons.

To see the results his clients achieved and read their testimonials, see the Experience section of our website.



**Center for World-Changing Organizations**

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# OUR SERVICES

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## Consulting services

**Consulting** is at the core of what we do. We offer a full range of consulting services in all phases of planning, marketing, and leadership development—guidance, surveys, design, facilitation, and implementation. We have consulted on strategic planning for many organizations whose reach extends from local communities to 30 countries.

As we stated on our Home page, **we believe the keys to world-changing success are effective strategies, marketing, and leadership.** Though we can consult on a broad range of topics, these three subjects are the core of our expertise. That's why we've written eight guides and workbooks on them.

- **Strategic planning.** One of our primary services is helping organizations design breakthrough strategic plans using our unique approach to strategic planning.
- **Strategic marketing.** We also help our clients better understand, engage, and serve those who determine their success—their target audiences. Most world-changing organizations should be able to make major gains in performance by adopting our approaches to strategic marketing and branding.
- **Organizational development.** It is the art and science of making organizations more effective at delivering on their missions and creating great places to work. Although strategic planning and marketing are discrete management fields, organizational development (OD) is not.

Instead, it draws from various disciplines to enhance an organization's human, operational, and structural resources. The best way to unlock the power of OD is through our consulting and training services. We tailor them to the unique circumstances and challenges of each of our clients.

## Training programs

We offer a wide range of highly rated training courses on many subjects crucial to world-changing organizations.

### Planning and facilitating retreats and board meetings

Retreats and board meetings are often the best times to gain strategic insights and forge strong bonds among leaders. We help leaders plan these gatherings and then facilitate them. We help them set strategic goals, design creative ways to achieve them, and ensure discussions are both honest and respectful. Topics range from emerging opportunities to resolving underlying issues.

## Keynote addresses

But perhaps the best topic is “*How can we make our organization more successful?*” We’d welcome the opportunity to explore this question with your leaders and board from an hour-long meeting to a weekend retreat. Participants would consider what success means to their organization; what supports, produces, and drives it; and how to strengthen the forces behind it.

## Printed guides and workbooks

We print our guides and workbooks on 28-lb paper and 80-lb cover stock. We punch and spiral bind them using heavy industrial punch binders. You could help **us defray our 'opportunity costs'** associated with the years we spent researching and developing the ideas and tools in these guides by buying our printed leadership guides. We charge \$25 for each printed guide and workbook you order, which includes free shipping in the US and Canada.

# OUR TRAINING COURSES

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## STRATEGIC PLANNING

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### Introduction to Strategic Planning

This course is based on our *Strategic Planning Guide: How to Design More Effective Strategies to Deliver on and Support Your Mission*. It is a practical, "how-to" course. It will help those who lead or participate in planning formulate much more effective plans. Plans that will make their organization or unit more successful. For most world-changing organizations, this means *improving current or devising better strategies to promote, fund, and deliver on their missions*.

As far as we know, this is the first training course on strategic planning designed for companies, nonprofits, and governmental agencies committed to making the world better. It represents *a new way to plan*. For starters, it focuses on strengthening *the factors that support, produce, and drive organizational or unit's success*. It also incorporates strategic marketing into planning, so planners can better understand those who determine their organization's or unit's success—and design better strategies to engage and serve them.

This training course will help planners:

- Gain a deeper understand of what a strategic plan needs to accomplish as well as the thinking behind each of the seven steps of our planning process.
- Understand who or what drives their organization's or unit's success.
- Design better—and often ingenious—ways to advance and support their mission.
- Strengthen their brand and marketing.

**Key topics** are organized by six questions in Steps 2-7 in our seven-step planning process:

1. **Planning to plan.** We review what needs to be in place before planning begins: Leadership setting the goals for planning. Choosing the right consultant and recruiting the best planning team. Reviewing the planning process. Deciding when and how the planning team will split into smaller groups to investigate specific subjects. Setting a timetable for planning. And determining when the team will share its interim findings and decisions with leadership and the rest of the organization.
2. **How successful is your organization or unit?** Some of the planning questions and issues covered in this step include: How does your organization define “success?” What’s the best way to commission a performance review as well as external and internal surveys? Determining what your organization or unit excels at? And identifying strategic opportunities and challenges that the plan needs to address?
3. **What supports your success?** We explore how seven key factors of success support the success of most organizations and units. They are: Guided by your core values and intentions, a distinctive and compelling brand, focused on what you excel

at, highly motivated staff, an outward-looking and target-audience mindset, sufficient capabilities, and efficient operations. Participants start drawing the *success map* of their organization or unit beginning with the factors that support success. They'll also begin drawing its *strategic framework*.

4. **What produces your success?** This step presents a new and, we believe, more accurate model of how organizations and units can become more successful by designing better strategies or improving current ones. We examine 1) the core functions that your organization or unit must carry out to succeed, 2) its strategies to perform them, 3) the implementation steps to put strategies in place, which are usually done once, and the operational steps to perform them on an on-going basis.
5. **What drives your success?** Next, we focus on your key drivers of success—the results and conditions produced by your core functions that determine your ability to deliver on and support your mission. Examples of these drivers are *exceeding both clients' expectations to fulfill their needs* (associated with your mission) and *funders' and investors' expectations of you to help them achieve their goals*.
6. **What remaining strategic issues and opportunities do you still need to address?** The previous steps should have addressed most of the strategic opportunities and issues identified in Step 2. For those that haven't and for new ones that came up since then, address them now.
7. **What do you need to do better or different to be more successful?** In this last step, participants complete their success maps and strategic frameworks. We then describe how to review and rank the strategic importance of the findings and insights from previous steps. We discuss the importance of distilling them down to the “vital few” **strategic initiatives** that the organization or unit will pursue for the next five years or so. They are the key things that need to be done better or different to be more successful in the future.
8. Last, we review the content and organization of the strategic plan itself, including incorporating action plans into the plan and what to put in the appendix. We conclude by reviewing our **strategic review model**. Leadership can use it to annually review progress on the plan's implementation and adapt it to changing conditions.

“Hands-on” group breakout activities focus on completing a success map and strategic framework diagram for the organization and units represented in the course. By creating these diagrams, participants gain a deeper understanding as well as visualize, probably for the first time, how the elements of strategic planning fit together into a coherent, integrated plan. They also “see” how success arises and could be strengthened in their organization and units.

***Please see our Guide to Strategic Planning for more information about our unique approach to strategic planning.***

**Course length, audience, and prerequisites.** Preferably a two-day course. Designed for those who lead, facilitate, and work in planning. But anyone can take it. No prerequisites.



# STRATEGIC MARKETING

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## Introduction to Strategic Marketing

We designed this course around our *Strategic Marketing Guide: How to Better Understand, Engage, and Serve Those Who Determine Your Success*. It is the first training course ever designed for strategic marketing of world-changing companies, nonprofits, and governmental agencies. It translates corporate, for-profit strategic marketing into ideas and strategies that make sense for organizations that are making their communities, regions, and the world better places to live and thrive.

As the title indicates, the course describes the best ways to understand, engage, and serve those who determine your organization's success. We divided the course into two parts: first an introduction to the ideas behind strategic marketing and then an overview of our five-step approach to market strategically.

**Key topics** in this one- or two-day course include:

- **Introduction to strategic marketing.** Strategic marketing's origins, impact on organizational success, key terms, markets and audiences, core marketing strategies, and differences between world-changing versus profit-driven marketing models.
- **Marketing review.** Assemble your marketing team, review your organization's guiding statements, assess its knowledge and attitudes about strategic marketing, and analyze your current marketing strategies and success.
- **Marketing research.** Survey your audiences' impressions of your organization and what it offers. Research and seek new marketing opportunities.
- **Marketing targets.** Identify your best individual and organizational targets.
  - Segment markets into audiences to distinguishes good from bad prospects.
  - Target your best prospective audiences (or individuals). Assess merits of mass marketing, targeting one vs. several audiences, and marketing to individuals.
- **Marketing strategies.**
  - Position your brand and offerings to stand out from the herd.
  - Develop a more compelling brand.
  - Offer the most appealing and valuable products and services—your offerings.
  - Develop and launch effective marketing communications.
  - **Marketing success.** Build an audience-focused organization.

*Please see our Strategic Marketing Guide for more information about this course.*

**Course length, audience, and prerequisites.** One- or two-day course, depending on your organization's needs. Open to anyone interested in strategic marketing. No prerequisites.

## Introduction to Branding

This course is based on our *Branding Guide: How to Stand Out from the Herd of Organizations in Your Field*. Branding has emerged as the most powerful strategy and tool of strategic marketing. It is best understood within the context of strategic marketing, particularly *target audiences* and *positioning*.

Just as cowboys brand cattle to separate their herd from other cattle on the open range, organizations brand themselves to distinguish themselves from competitors and highlight what their intended audiences find most compelling about them. A strong brand positions an organization and what it offers in audiences' minds as the only or best one to fulfill their needs and solve their problems.

We demystify what a brand is in a unique way: we define it from two perspectives—those who design it and those it intends to influence. A *real brand* is target audiences' collect impression of the organization and what it offers. This is an organization's actual brand, which its target audiences carry around in their heads. An organization's *desired brand* is the image it tries to project of itself and what it offers. This ideal brand is one that leaders and marketers carry around in their minds.

We recommend participants brand their organizations based on what their audiences find most compelling and distinctive about their organization. In branding, more is less. We advocate distilling a brand down to its essence, even if all but one of the great ideas for it is left on the cutting room floor. That's the best way to stake a claim to the idea you want to "own" in your audiences' minds. We recommend tightly focused brands.

We introduce our unique branding model for world-changing organizations in this course. The three key elements of a brand are 1) the organization's audiences, 2) its key attribute, and 3) its icon. Our branding model has these five steps:

- Decide what you want your brand to do.
- Conduct a branding survey or include the topic of branding in your broader external survey.
- Decide if you're satisfied with your brand and, if not, how to improve it.
- Design your brand strategy (hint: it's more than just coming up with a new brand).
- Implement your branding strategy and monitor its success.

*Please see our [Guide to Branding](#) for more information about our unique approach to branding a world-changing organization.*

**Course length, audience, and prerequisites.** One-half or one-day course, depending on your organization's needs. Open to anyone interested in branding, but those who have taken our strategic marketing course will understand the course at a more intuitive level. No prerequisites.

# LEADERSHIP AND MANAGEMENT

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## Introduction to Leading a World-Changing Organization

The job of leading a world-changing organization comes without a manual. Most management authors write books for profit-driven leaders. Their focus is increasing shareholder value; not changing communities, regions, or the world. This course is based on our *Leadership Guide: How to Build a More Successful World-Changing Organization*.

World-changing companies, nonprofits, and governmental institutions have different missions, core functions, and employees than their for-profit counterparts. This course explores these differences and how world-changing leadership should reflect them. The rest of the course is organized around these seven guidelines for effective leadership:

- **“Be the change.”** This quote from Gandhi captures the importance of aligning one’s values and behavior with the organization you lead.
- **Adopt a participative leadership approach.** In contrast to what we see as a profit-driven company’s *autocratic* and nonprofit *laissez-faire* leadership styles, we advocate a *participative leadership* for world-changing organizations. We explore what this style is, how it empowers and motivates staff, and how to adapt it to different situations (hint: it’s not always the best approach). But in the end, you need to discover your natural leadership style and then adapt it to the culture and circumstances of your organization.
- **Strengthen your leadership team and professional relationships.** To do this, we advise putting talented people in the right positions, help managers discover their strengths, enhance teamwork with your leadership team, and focus on *overall team*, instead of individual, performance. We address in some detail the “sticky” issue of dealing with and “letting go of” underperforming members of your leadership team. Last, we cover strengthening professional relationships and deep listening.
- **Improve your organization’s strategies to fulfill, fund, and strengthen support for its mission.** We describe how organizations *support, produce, and drive* their success. The content of this guideline reflects our approach to strategic planning.
- **Help your organization better understand, engage, and serve those who determine its success.** This guideline is based on the five marketing strategies from our approach to strategic marketing for world-changing organizations.
- **Build a flywheel for success.** This guideline is the heart of our leadership model. It has three parts: 1) Improve an organization’s ability to fulfill its audiences’ needs and make advances in its field, 2) Make every program a success and one a star, and 3) Build sustainable funding streams and strength support for your organization.

*Please see our [Guide to Strategic Planning](#) for more information.*

**Course length, audience, and prerequisites.** Two-day course. Open to anyone interested in leadership and particularly members of your leadership team. No prerequisites.

## Introduction to Managing World-Changing Staff and Projects

This course is based on our *The Manager's Survival Guide: Five Keys to Guide World-Changing Staff and Projects*. It is a practical, "how-to" course to, among other things, rein in the "cat herding" tendencies of managers who must guide highly independent and intelligent staff as well as manage complex projects—and try to leave some time left over to work on their projects.

Our *participative management model* meets the unique management challenges of local-to-global corporations, nonprofit organizations, and public institutions working to make the world better. We built it around five management themes that we believe are critical to their success: *clarity of mission, talent, empowerment, teams, and performance*.

We believe that neither the current plan-organize-lead-control management system nor a more hands-off, laissez-faire management approach of many nonprofits is appropriate for these organizations. Mission-driven, authority-averse employees bristle under command-and-control management systems but, if left to their own devices, tend to work on projects of most interest to them instead of those crucial to their organizations. Our five management keys are:

- Clarify your unit's mission and how it measures success.
- Develop your staff's natural abilities into talents.
- Empower and coach your direct reports. Push decision-making down to the lowest appropriate level.
- Build a collaborative and team-based work environment.
- Improve your unit's performance by helping your staff better understand and fulfill their clients' needs and make advances in their field.

The Gallup Organization has done extensive research on management practices. Its researchers have conducted *millions* of employee surveys and a large number of organizational assessments. Whenever possible, we base our management practices on their findings.

*Please see our [Manager's Survival Guide](#) for more information on our approach to managing world-changing staff and projects—and protecting your time so you can work on your projects.*

**Course length, audience, and prerequisites.** One- or two-day course, depending on the needs of your organization. Open to supervisors, managers, team leaders, and leaders—or anyone aspiring to these positions. No prerequisites.

# QUALITY IMPROVEMENT

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## Introduction to Quality Improvement

This course is a practical guide to quality improvement (QI). While some organizations have excelled due to QI, others have been frustrated with how some practitioners adopt an overly formalized, dogmatic approach to it. In this course, we focus on the most beneficial principles and practices of QI. Our QI model is similar to that of Joiner & Associates.

*This is one of our most popular courses.*

**Key topics** include:

- How quality is measured through the eyes of customers.
- A commitment to providing high-quality products and services is key.
- Almost everyone in an organization has customers and suppliers—for most staff they are internal customers and suppliers.
- The need to focus improvement efforts on high-leverage points in an organization, typically critical work processes.
- Eliminating complexity and reducing variation through the scientific approach.
- Overview of the basic tools of quality improvement such as flow charts, cause-and-effect diagrams, Pareto analysis, run charts, and other tools.
- Why teams are usually the best organization unit to make improvements.
- The importance of teamwork in an organization or work unit.
- The need for the organization to be "All One Team."

**Course length.** One day.

## Scientific Tools for Process Improvement

This course is designed to provide participants with the tools to understand and make significant improvements in their work processes. This course is highly interactive. Participants practice using the tools by working together in small groups to solve work-related problems. Past participants have especially enjoyed this course.

**Key topics** in this one-day course include:

- Introduction to the scientific approach and problem-solving techniques.
- Brainstorming, multi-voting, and affinity diagrams.
- Operational definitions, stratification, benchmarking, and pilot tests of potential solutions
- Flow charts, check sheets, and time plots.
- Pareto charts.
- Cause-and-effect diagrams.
- Histograms, scatter diagrams, and statistical process control charts.
- External customer surveys.

**Course length.** One day.

# STATISTICS

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## Practical Statistics in the Workplace

Surprising as it may seem, participants rave about this course. Some have taken it twice! We present this course as a set of philosophies and tools to better understand and make sense of the world, particularly the world of work. This course is a lot more than just learning to calculate the mean, mode, and median of a data set. You may leave it a changed person (for the better—we hasten to add).

Throughout this course, individuals, groups, and sometimes the class are challenged to apply what they have just learned to solve work-related problems. Sometimes this requires working through a calculation with a calculator, other times we challenge groups to respond as a supervisor or manager to case histories involving unusual variation in work processes or results—in other words, when to act and when doing so will make matters much worse.

**Key topics** include:

- Statistical approaches to improving processes, products, and services.
- Types of variables one encounters at work: Continuous vs. discontinuous measurement variables and attribute variables.
- Understanding the meaning and importance of data, sample, population, random sampling, precision, and accuracy.
- Calculating central tendency (arithmetic mean, median, and mode) and dispersion (range, variance, and standard deviation).
- How to display data dispersion through frequency distributions. Understanding the significance of the normal distribution.
- Understanding when managers, supervisors, and staff need to act on changes in a process and when doing so is the worst thing you could do (distinguishing between common-cause and special causes of variation).
- Creating a simple statistical process control chart.
- Understanding how ignorance of variation causes people to make serious mistakes in response to variation. Problems arise when supervisors and staff tamper with stable processes or fail to take immediate action to special-cause variation.

**Course length.** One day. Open to anyone (not just the brave). No prerequisites.

# TEAM BUILDING

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## Introduction to Teams: How to Use Teams to Improve Organizational Performance and Enhance Employee Satisfaction

We designed this course as an introductory course to our flexible approach to using teams and being a team member. Participants will learn when to use teams and what type of team is most appropriate for a given situation. These teams range from temporary single-issue task team to permanent self-managed ones.

**Key topics** include:

- What's unique about teams? — And how they differ from committees and work units.
- Using different types of teams for different purposes.
- Critical success factors for teams.
- How to implement teams, so they succeed and thrive.
- What new team members can expect from being on a team.
- Examples of how and why teams improve organizational performance.
- Stages of team development and normal cycles within them.
- Roles and responsibilities of team members.
- New leadership roles for supervisors and managers.
- What to do for teams that flounder or are "just having problems."
- Superior work teams: Just how rare are they and how do you foster them?

**Course length, audience, and prerequisites.** One-day course. This course is open to anyone who wants to learn more about teams. Prospective or current team members, as well as managers and supervisors who are designing or work with teams are encouraged to attend.



## Self-Managed Work Teams: What They Are, How They Operate, & How to Implement Them

This course introduces participants to one of the most effective and fastest-growing approaches to improving organizational performance. Self-managed work teams (SMWTs) are small groups of people who manage themselves and their work on a day-to-day basis.

The critical question of whether to design SMWTs around current work units or form them around re-engineered work processes will be addressed in detail. The course draws on examples of self-managed teams, many of which are from the instructor's consulting practice on SMWTs. Depending on the nature of the audience, more advanced topics can be addressed.

**Key topics** include:

- Characteristics and advantages of SMWTs.
- Five phases of SMWT implementation and challenges of implementation.
- Attributes and skills of successful SMWT members.
- Roles and responsibilities of team leaders and members.
- Job rotation.
- The new leadership role of supervisors and managers.
- The gradual transfer of decision-making authority to SMWTs.

**Course length, audience, and prerequisites.** One-day course. Open to anyone interested in SMWTs. The course is designed for new or recent SMWT team members as well as managers and supervisors who are interested in learning more about SMWTs or how to design and implement them. No prerequisites.

## Team First Aid: Team Revitalization

This is a highly interactive training course designed to improve teamwork in existing or newly created teams. Sometimes sensitive topics or inter-personal issues build up over time that prevent teams from functioning at their full potential.

Other teams enter periods where enthusiasm for the team wanes. This training course is a combination of general techniques to get a team back on course. It also introduces several approaches to build high-performance teams.

**Key topics** include:

- Assessment and discussion of communication within a team and between it and the rest of the organization.
- Administering the Team Development Assessment tool and discussing its results.
- How to assess and improve team meetings, completing work assignments, and improving team performance.
- Importance of clarifying the team's purpose and expectations of its members.
- Exploring the strengths and advantages of teams to an organization as well as team members.
- Assess team development based the four stages of team development (forming, storming, norming, and performing) as well as to independence, dependence, and interdependence of team members.
- Practicing active listening and feedback skills.
- Techniques for conflict resolution in teams.
- Brainstorming and voting via nominal group technique of team issues.
- Categorizing issues as misunderstandings, insensitivities, different points of views, or personal issues unrelated to work.
- Capitalizing on differences in skills, experiences, and perspectives of fellow team members to evolve into a high-performance team.

**Course length, audience, and prerequisites.** One- or two-day course. Open to all teams. No prerequisites.

# TEAM SKILLS TRAINING PROGRAM

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If your organization is serious about moving to a team-based structure, our team skills series may hold the key to its success. Far too many organizations jump onto the *team* bandwagon, only to realize in retrospective that it jumped into the deep end of the pool and nearly drowned. *Teams can be wonderful but never easy.*

Without thinking through your administrative policy, operating procedures, and ground rules, your teams and organization could lose their way quickly. And unless teams and their leaders understand how they fit into the broader organization, how they work, deliberate, make decisions, and resolve conflicts, they're apt to wander about without progressing.

**Our team skills training courses and modules are the best resources we know of on teams and how to adopt a team-based organizational structure—and revitalize existing ones.**

## Team Skills 101: Team Awareness Training

### **Module 1. Introduction to Teams for New Team Members (2 hrs.)**

We designed Module 1 to introduce new team members to teams and how they operate. It addresses how teams differ from committees and what it means to be on a team. It covers team charters, ground rules, agendas, team meetings, consensus decision making, and minutes. It also describes the benefits of being a team member and the initial stress that often goes along with it.

### **Module 2. Teamwork and Team Dynamics (2 hrs.)**

This module describes how to develop a high level of teamwork within a team. It covers beneficial team behaviors; the importance of a clear team mission, goals, and action plans; roles and responsibilities of team members, team leaders, and facilitator; stages of team development and the roller-coaster of ups and downs; and other factors.

### **Module 3. Effective Communication, Active Listening and Feedback Skills (2 hrs.)**

Module 3 is designed to help participants become better communicators on teams. It outlines the principles and practice of active listening skills; how to give and receive constructive feedback; what to do when emotions rise to the surface in team meetings; the role of facilitator, team leader, and team members in communication; and how to make conflict situations opportunities for learning.

**Audience and prerequisites.** This course is open to anyone who wants to learn more about teams. It is designed, however, for prospective or current team members and is part of our series of modules on team skills. Modules can be presented individually or *a la carte* day-long trainings from modules selected from Team Skills 101-105.

**Course length.** One day.

## **Team Skills 102: Team Preparation Training**

### **Module 4. Team Administration: Team Charter, Administrative Policy, Operating Procedures, and Ground Rules (1.5 hrs.)**

Module 4 reviews of how a team charter can be used to clarify team mission, membership, outside resources, operating procedures, administrative policy, ground rules, and other issues.

### **Module 5. How to Run Effective Meetings (2 hrs.)**

This module introduces a step-by-step approach to assuring that meetings are well planned, how to use of agendas and minutes, roles of team members and facilitator, stages of a meeting, and effective follow through of assignments.

### **Module 6. Brainstorming, Multi-voting, Nominal Group Technique, and Consensus Decision Making (2 hrs.)**

This module introduces a practical approach to using different group-problem solving tools and team decision-making models.

### **Module 7. Problem Solving Strategies (1 hr.)**

Module 7 presents our seven-step problem-solving method along with stand-alone strategies for problem-solving. Flexibility and creativity in problem-solving is stressed.

**Audience and prerequisites.** We designed these modules for new or current team members. Familiarity with modules 1-3 is preferable but not required.

**Course length.** One day.

## **Team Skills 103: Basic Process Improvement Training**

### **Module 8. Mapping and Streamlining Work Processes (2 hrs.)**

In Module 8, we present different ways to map and analyze work processes with inputs from suppliers, outputs to customers, and feedback loops. We introduce the four types of flow charts that participants would commonly use as well as how to use them to streamline most work processes.

### **Module 9. Improving Internal Supplier and Customer Relations (1.5 hrs.)**

This module describes how to improve relationships and interactions among internal suppliers and customers. We introduce techniques for assessing the quality of information and materials flowing into and out of work processes. We also explore specific techniques for improving the interactions between people or teams involved in supplier and customer interactions.

### **Module 10. Basic Scientific Tools for Process Improvement (3 hrs.)**

In this module, we introduce check sheets, histograms, stratification, cause-and-effect diagrams, and Pareto analysis. Participants will get a chance to use most of these tools.

**Audience and prerequisites.** We designed these modules for both new and current team members. Familiarity with modules 1-7 is preferable but not required.

**Course length.** One day.

## **Team Skills 104: Advanced Process Improvement Training**

### **Module 11. Advanced Scientific Tools for Process Improvement (3 hrs.)**

In Module 11, we introduce advanced tools, such as operational definitions, benchmarking, customer surveys, pilot testing, stratification, sampling techniques, run charts, and SPC control charts. Participants will get a chance to use some of these tools.

### **Module 12. Basic Statistics for Process Improvement (3.5 hrs.)**

The principle focus of this module is the understanding and description of variation. We introduce the statistical approach to data collection and analysis, random sampling in a population, types of variables, frequency distributions, different types of averages, variance, and standard variation in this module.

**Audience and prerequisites.** We designed Modules 11 and 12 for new or current team members. Familiarity with modules 1-10 is preferable and familiarity with the material in Module 10, Basic Scientific Tools for Process Improvement, is recommended.

**Course length.** One day.

## **Team Skills 105: Advanced Team Skills for Long-term Teams**

### **Module 13. Conflict Resolution for Long-term Teams (4.5 hrs.)**

Long-term teams often need a system to deal with conflict in a constructive manner. This module presents a systematic approach to conflict resolution based on five integrated strategies. They include looking for shared goals and win/win solutions; clarify, sort, and value differences; gain commitment to change; analyze recurring cycles; and unilaterally demonstrate change. We base our model of conflict resolution on the work of Dr. Kenneth Kaye, which he describes in his book *Workplace Wars and How to End Them*.

### **Module 14. The Inner Game and Subtle Issues of Long-term Teams (1.5 hrs.)**

Over time, a team can develop a particular and often subtle way of not dealing with issues lurking below the surface and the behavior of some team members. What often prevents a team from evolving into a truly superior work team is an inability to address the attitudes and behavior of some team members, supervisors who consciously or unconsciously hold onto authority or thwart team initiatives, and related issues. In this module, we explore the best ways to deal with these team-debilitating issues. One method we present is the progressive discipline model for poorly performing team members.

**Course length.** One day.

# CUSTOMER SERVICE

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## Understanding and Improving Customer Service

This course is designed to make everyone in an organization aware of the fact that they are, at one level or another, a customer service representative. All employees need to be acutely aware of who their customers are and what's important to them. From a customer's perspective, *how* employees provide service is often as important as *what* they provide.

Participants will learn techniques for putting themselves "in the shoes of their customers" and creating outstanding customer service.

**Key topics** include:

- An in-depth understanding that customers' perceptions of the quality of products and services are usually multi-dimensional—friendliness of staff, feeling listened to and respected, convenience, speed of delivery, cost, physical setting, and a variety of other factors.
- Techniques for assessing what is important to customers through surveys, focus groups, and other means.
- Developing a strategy to create outstanding customer service within your organization, work unit, or customer service team.
- Creating win/win relationships with customers and employees.
- Techniques for measuring the quality of customer service.
- How to deal with "difficult" customers.
- Determining whether your *system of customer service delivery* is creating dissatisfied customers and unhappy employees.

**Course length.** One day.

# CHANGE MANAGEMENT

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## Off-site Team Building Retreat for Leadership Teams and Work Units

This course is a highly interactive. We designed it to give teams the opportunity to explore critical issues affecting their performance and team dynamics. We customize this course to address specific team issues. We can employ a broad range of techniques and activities depending on what the team needs to realize and address to improve its performance and build a more enriching work environment.

Past participants have raved about this course.

**Key topics** in this one-day course may include:

- Review of team building principles and practices.
- Active listening and feedback skills.
- Conflict resolution.
- Experiential team building.
- Brainstorming and multi-voting.
- Problem-solving approaches and root-cause analysis.
- Techniques for developing assessing alternative solutions via matrix analysis.
- Interactive team building activities.
- Other topics as required.

**Course length.** One day.



# COMMUNICATION & CONFLICT RESOLUTION

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## Sharpening Your Communication Skills at Work

This course is designed to help participants, first and foremost, become better listeners. Among other things, they explore and practice more effective ways to express themselves, especially in challenging and emotionally-charged situations. This is a fun and highly interactive course.

**Key topics** include:

- In-depth coverage and practice of active listening skills.
- Removing the filters that prevent us from hearing what others are saying.
- Understand first what you are really trying to communicate.
- Importance of trust in communication.
- Actions really do speak louder than words.
- Importance of what is not said.
- Creating win/win solutions through open communication.
- Giving and receiving feedback.
- Communication openers and closers.
- Communicating with different personality types.
- Alternatives to criticisms and when negative feedback is warranted.

**Course length.** One day.

## A Practical Guide to Resolving Conflict at Work

This course is designed to give participants and groups a better understanding of the opportunities inherent in conflict situations and techniques for managing conflict constructively. We introduce and use a conflict resolution system derived from Dr. Kenneth Kaye's conflict resolution model, which he describes in *Workplace Wars and How to End Them*.

**Key topics** in this one-day course include:

- Five approaches to conflict management and their appropriate use.
- Explanation and practical use of the conflict resolution model presented.
- Identifying shared goals and win/win solutions in conflict situations.
- Active listening and feedback skills.
- Reframing a problem by filtering out misunderstandings, insensitivity, points of view, and individual issues.
- A technique to get someone to commit to change by recognizing that the only person that they have control over is themselves.
- Understand and be able to intervene in a recurring cycle of conflict within a group (think: *Who's Afraid of Virginia Woolf*).
- Understand the critical importance of demonstrating unilateral change to resolve many types of conflict.

**Course length.** One day.

*Never doubt that a small group  
of thoughtful, committed people  
can change the world.*

*Indeed, it is the only thing that ever has.*

— Margaret Mead

## OUR SERVICES AND RESOURCES

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### Consulting and Training Services

We offer a full range of consulting services on planning, marketing, and organizational development—design, surveys, facilitation, implementation, and evaluation. We offer training programs on many subjects. See our *Catalogue of Services on our website* for details.

### Planning and Facilitating Retreats and Board Meetings

Retreats and board meetings are the best times to gain strategic insights and forge strong bonds among leaders. We can help you plan and facilitate these gatherings. We also can help you set their goals, design creative ways to achieve them, and ensure discussions are honest and respectful. Topics can range from emerging opportunities to resolving underlying issues.

Probably the best topic is *“How can we make our organization more successful?”* We’d welcome the opportunity to explore it with your leaders and board from an hour-long meeting to a weekend retreat. They’d consider what success means to their organization; what supports, produces, and drives it; and how to strengthen the forces behind it.

### Keynote Addresses

Topics for our keynote addresses include world-changing strategy, marketing, and leadership, which we tailor to your organization; inspirational stories to motivate staff; and other topics.

### Your Resource Library for Making a Difference in the World

*#1 Strategic Planning Guide: How to Design More Effective Strategies to Deliver on and Support Your Mission* ~55 pages

*#2 Strategic Planning Workbook* ~40 pages (not pictured below)

*#3 Guiding Statements Guide: Core Values, Mission, and Vision* ~25 pages

*#4 Strategic Marketing Guide: How to Better Understand, Engage, and Serve Those Who Determine Your Success* ~50 pages

*#5 Strategic Marketing Workbook* ~50 pages (not pictured below)

*#6 Branding Guide: How to Stand Out from the Herd of Organizations in Your Field* ~25 pages

*#7 Leadership Guide: How to Build a More Successful World-Changing Organization* ~75 pages

*#8 Manager’s Survival Guide: 5 Keys to Guide World-Changing Staff and Projects* ~30 pp.

