

# Menu Options

## STORY

Assembled team members share their individual stories without interruption or distraction

### Purpose

- To know and be known. There are few things more powerful in getting to know someone than sharing of story. Sharing story builds trust, creates relational equity, and increases understanding.

### Flourishing Culture Focus

- Primary: Empathy
- Secondary: Empowerment

## ASSESSMENTS

### Purpose

- Growth in self-understanding and awareness, first; growth in others-understanding and awareness, second.
- Understanding, insight, effectiveness, and team cohesiveness. Assessments provide both individual and team insights, challenges, and growth areas.

### Flourishing Culture Focus

- Primary: Empathy (Understanding; Relational effectiveness)
- Secondary: Empowerment (Team building and cohesiveness; Finding and using one's voice)

- DISC** Offered as a 2-hour, half day, or full day experience.
- Personality wiring.
  - Understanding, appreciation, leveraging similarities and differences.
  - Understanding motivation, sources of conflict, and communication styles and preferences.

- Enneagram** Offered as a half or full day experience.
- Core motivators and demotivators.
  - Understanding the dynamics of how people respond under stress and in health.
  - Understanding natural coping mechanisms, relational triggers, and self-protection methodologies.

- LivStyles** Offered as a 2-hour, half day, or full day experience.
- Basic personality wiring and preferences.
  - Communication preferences.
  - Conflict engagement styles.
  - Decision-making effectiveness-individual and team.
  - Motivation factors.

- MBTI** Offered as a 2-hour or half day experience.
- Personality preferences.
  - Understanding preferences of energy recharging, information gathering, decision-making, and organizational preferences.

Many other team, personality, growth, and learning assessments available

## TRAINING

Offered as 2-hour, half-day, or full day experiences

### Purpose

- Skill building and enhancement.
- Greater relational and team effectiveness.
- Greater efficiencies.

### Flourishing Culture Focus

- Primary: Empowerment (Team integration; Equipping for greater efficiency and effectiveness; Finding and using one's voice).
- Secondary: Empathy (Relational growth and effectiveness).

### Communication

Effective communication model with increased clarity and removing ambiguity.

### Decision-Making

Collaborative and effective decision-making model produces process clarity, keeps team on the same page, and moves methodically through an evaluation process to ensure multiple options are explored and selecting the best solution possible.

### Delegation

Understanding the "Control and growth dichotomy" through two models for effective delegation.

### Effective 1-on-1's

A model for having effective 1-on-1's between supervisors and direct reports.

### Healthy Conflict Engagement

A model encouraging everyone's voice to be used and heard during times of conflict.

### Listening

Discover and apply more effective listening and engagement.

### Problem-Solving and Decision-Making

Two models for effective problem solving for both simple and complex problems.

### Purposeful Meetings

Learn to have purposeful, efficient, and effective meetings.

## WORKSHOPS

Offered as half-, full-, or multi-day experiences.

### Purpose

- Growth in learning, understanding and integrating concepts into relevant and simple practices.
- Greater relational and team effectiveness through relationship building

### Flourishing Culture Focus

- Primary: Empowerment (Team integration; Equipping for greater efficiency and effectiveness; Finding and using one's voice).
- Secondary: Empathy (Relational growth and effectiveness).

### Board of Directors Development

Facilitation and coaching in developing high performance, flourishing boards of directors. Whether putting in a board or catalyzing an existing board to perform at a higher, healthier level, this facilitation and coaching works directly with boards in the following areas (not exhaustive):

- vision (what)
- mission (how)
- purpose statements (why)
- oversight & governance
- accountability for boards & senior leadership
- metrics & measurements for effective organizations & boards
- means & ends of the organization

### Brainstorming Methodologies

Several models for generating many and creative ideas in just a few minutes and a process for prioritization of most beneficial ideas.

### Building a Flourishing Organization

A multi-session workshop focusing on the three pillars of building flourishing organizations: empathy, empowerment, and excellence. This workshop unpacks the pillars, explains what they are, and provides relevant and practical tools and exercises for implementation.

### Business Ethics

A deep dive into business ethics applied to the modern world. Various topics around "ethics" will be presented and explored from the perspective of relevant and practical implementation.

### Critical Thinking

A model for understanding how bad thinking leads to bad decisions, strained and broken relationships, and sub-par performance.

### Five Dysfunctions of a Team

Based on Patrick Leoncini's book, this workshop includes a robust team assessment followed by multi-session training on how to build healthy, flourishing teams by addressing the 5 dysfunctions most common in teams.

### Leadership Succession

Whether planning for leadership succession or business ownership succession, this workshop focuses on the critical dimensions, planning, and preparation necessary to make sure that the organization continues to grow and flourish in successive iterations of leadership and ownership.

### Leadership & Self-Deception

Based on the book by the Arbing Institute, this workshop unpacks the root causes of self-deception, the importance of leaders not being self-deceived, and how to exit the "box" of self-deception toward other people.

### LifePlan

Assembling an individual "LifePlan" focused on becoming the best and optimal version of oneself.

### Personal Board of Directors/Advisors Development

Developing the processes and procedures for implementing a personal board of directors or advisors. Includes training in who to recruit, cadence, KPI development, agenda, and accountability metrics and measurements.

### Toxic Triangle and Equilibrium Triangle

Two models for understanding how negativity and toxicity in relationships can turn a culture toxic...and what to do about it.

## COACHING

- Individual** • 50-60 Minute conversations
- Dyad** • Two people, usually leaders in the same area/team  
• 50-60 Minutes
- Small Team** • 3-7 people  
• 1-2 Hours
- Large Team** • <=15 people (Topics must be narrowly focused otherwise it is unwieldy)  
• 1-2 Hours

### Purpose

- Growth in self- and others-understanding and awareness.
- Growth in leadership efficacy.
- Growth in effectiveness in leadership, decision-making, processing, and relationship building.

### Flourishing Culture Focus

- Primary: Empowerment (Leadership learning and growth; Confidence; Insight).
- Secondary: Empathy (Relational growth and effectiveness).

Coaching is not "counseling"; it is fundamentally different. Focused on helping the person/team by coming alongside, asking questions, supporting, encouraging, and challenging the person figure out the answers they need to make the most effective decisions possible in the order they need to make them.

#### Helping to understand:

- What they are thinking.
- Key problems they are trying to solve.
- Learning and growth areas key to becoming more effective personally and professionally.
- Understanding self and others more.

One of the most important and difficult areas to create and implement robust, consistent, sustainable, and scalable processes is in Human Systems. Human Systems include anything related to the treatment of people in your organization.

## PROCESSES

- Recruiting
- Hiring
- Onboarding
- Performance optimization
- Aligned reward systems
- Delegation
- Leadership development
- Performance correction
- Career pathing
- Succession planning
- Firing & exiting with excellence

### Purpose

- Building of robust infrastructure for building/developing people, an organization's greatest asset.
- Clarity of communication.
- Building of repeatable processes for consistency and scalability

### Flourishing Culture Focus

- Primary: Excellence (Clarity, consistency, structure, scalability)
- Secondary: Empowerment (Culture inculcation, clarity, equipping with tools, knowledge, resources, and training).

### Four key areas of a Flourishing culture's Human Systems

#### Recruiting and Hiring

Examples:

- Hiring for values & character.
- Interviewing techniques & tools.
- Hiring processes & phases.

#### Onboarding

Examples:

- Training in culture & values.
- Day 1, 30, 60, 90 responsibilities & expectations.
- Assigning a culture coach.

#### Performance Optimization

Examples:

- Real time.
- Quarterly check-ins.
- 1-on-1's
- Annual reviews.
- Annual IDP (individual development plan).
- Career planning & pathing.
- Compensation reviews.
- Performance correction.

#### Leadership Development

Examples:

- Equipping & training current leaders to lead more effectively.

#### Emerging Leaders

Examples:

- Identifying, equipping, & training new leaders with tools, skills, & resources to be effective & transformational leaders.

#### Strategic Planning & Execution

Examples:

- Determining vision, mission, & purpose.
- Mapping out the "here-to-there" plan.
- Discovering inspired & practiced values.

\*Note: Any of the Processes above could be presented in workshops, ongoing training, or co-collaborating.

One of the most effective ways to build camaraderie and to have relational bonding is through a multi-day experience as a team.

## RETREATS

### Purpose

- Offers the opportunity to have down time, have fun together as a team, and experience team outside of the daily grind, responsibilities, and stresses of work life.
- Learning and growth opportunities focused on key areas of leadership, best practices, and organizational culture.

### Flourishing Culture Focus

- Primary: Empathy (Relationship building, listening, understanding).
- Secondary: Empowerment (Learning, growing, bonding).
- Tertiary: Excellence (Processes, commitment, loyalty).

### Leadership 101: Relationship & Team Building

2-day experience focusing on the essential elements of relationship and team building.

- Sample topics: story, assessment, communication, healthy conflict engagement.

### Leadership 201: Leadership Foundations

2-day experience focusing on the foundational elements of leadership.

- Sample topics: assessment, effective decision-making, brainstorming, delegation, purposeful meetings, effective 1-on-1s.

\*NOTE: it is highly recommended to complete Leadership 201. It is not required, however.

### Leadership 301: Leadership Effectiveness

2-day experience focusing on the essential elements of leadership efficacy and effectiveness.

- Sample topics: assessment, Five Dysfunctions of a Team, creating a healthy, flourishing culture.

### Leadership 401: Leadership Legacy

2-day experience focusing on the advanced topics of leadership and leadership effectiveness.

- Sample topics: assessment, Leadership & Self-Deception, building flourishing organizations, succession planning.

### Human Systems Intensive

2-day to 3-day experience focusing on creating and building the essential elements of human systems.

- Sample topics: recruiting and hiring, onboarding, performance optimization, career pathing, performance correction and exit planning, succession, aligned reward systems, culture coaching.

### Domestic Organization Listening and Learning Tour

3-day to 5-day experience focusing on visiting several organizations to learn about best practices in leadership, organizational culture development, and flourishing organizations.

### International Organizational Listening and Learning Tour

7-day to 10-day experience focusing on visiting several organizations to learn about international best practices in leadership, organizational culture development, and flourishing organizations.