

“ The Foundational Leadership Workshops are delivered in modular form. This allows for flexibility, tailoring and the option to build knowledge over a period of time that is suitable to the participant. The modules capitalise on the success of our engagements in consulting and leadership development. They are the fruition of a proven approach. Participants can build a program that varies from half-a-day up to five days. ”

# Foundational Leadership Workshops

## Modules

Each module is made up of sessions. Each session is 1.5 hours. 1 day is made up of four sessions. Full day is 8 hours, extra time is intro, margin/buffer, action planning and summary.

## Development Category

## Workshop Modules

### Personal Disciplines & Character

Developing a Personal Vision  
Worldviews and Paradigms  
First Things First  
Problem Solving & Innovation  
Harmonised Passions

### Conversations that Matter

Dialogue (Theory U)  
Listening  
Asking the Right Questions  
Having Difficult Conversations  
Telling to co-creating  
Emails  
Coaching  
Feedback  
Public Speaking

### Working in Organisations

Cultivating a Clear Vision  
ARO  
Leading Teams  
Change  
Meetings  
Systems Thinking  
Staying in Touch with Reality  
Generative Organisations  
Communication & Collaboration Tools

### Working on Projects

Leadership vs. Management  
Project Lifecycle Overview  
Project Lifecycle Stages & Gateways  
Project Vision Document  
Engaging Stakeholders  
Project Context  
Risk Assessment  
Planning & Monitoring Tasks  
Quality & Change Control  
Project Reporting

### Frameworks & Tools

Intro to Frameworks  
Myers Briggs Type Indicator®  
Emotional Intelligence (EI)  
Generative Assessment Survey  
Six Thinking Hats

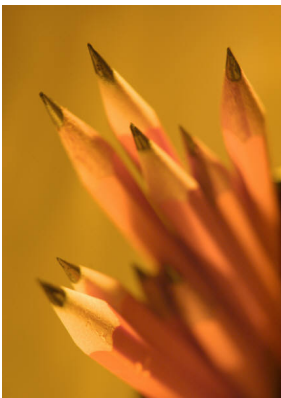
## Ask Yourself:

Who are the people that will shape your organisation's future?

What are the behaviours & competencies that need to change for this to happen?

What plans do you have to make this happen?

# Personal Disciplines & Character



## Developing a Personal Vision (I session)

Fundamental to being a leader is movement. Not ad hoc random movement, but sustained, resolute movement in a predetermined direction. Leadership is about rallying other people in that direction. Unless a leader stands for something as a person and in terms of organisational direction, leadership is simply a position and ineffective in delivering organisational imperatives. This module therefore provides the foundation for all leadership competencies.

## World Views & Paradigms (I session)

One of the most powerful realisations a leader can come to is that their view of the world is not objectively true, it is rather a subjective perspective. This module explores the powerful axiom that, 'Every point of view is a view from a point.' The wisdom associated with this realisation liberates leaders to engage other people in meaningful dialogue rather than the frustration associated with typical stakeholder communication.

## First Things First (I session)

Put simply, the single thing that most effectively undermines the success of people's work performance is the inability to spend their best energies on the activities that deliver long term positive outcomes. This module provides participants with the opportunity to examine their work habits against what has been described as the tyranny of the urgent; the relationship between activities that are urgent and those that are important. As a result of this module participants will be better equipped to spend their time on things that matter in the long term.

## Problem Solving & Innovation (I session)

In today's fast moving world, many of the challenges people come across cannot be overcome by solutions that have worked in the past. This module includes some tools and processes that can be used to help people navigate through complex problems that cannot be solved by simple, predetermined responses. It also includes a section on decision making.

## Harmonised Passions (0.5 session)

Successful leaders are continually plagued by maintaining work/life balance. This module proposes a new approach that challenges the helpfulness of balance as an appropriate measure. Simply spending less time in the office, it turns out, is not the answer.

Participants will explore what it means to get a life that harmonises what they enjoy, what they are good at, and what works economically.



# Foundational Leadership Workshops

## Conversations that Matter

### Dialogue (Theory U) (I session)

This module introduces a methodology for individuals and groups to solve complex problems. It is fundamentally about deep, intuitive, collective listening and the discipline of working with emergence rather than predetermined knowledge. Without this approach, discussion is a series of mini 'presentations' rather than genuine dialogue. Our inability to dialogue means that cross functional/interdepartmental meetings rarely create new knowledge and wisdom, they simply decide on which pre-held view gets adopted. This module equips participants with tools and approaches that enable leaders to facilitate innovative responses to challenges that typically get thrown in the 'too-hard' basket.

### Listening (I session)

In most workplaces, listening means 'waiting to make my contribution'. At the core of leadership competencies is the capacity to work with people. Much effort is spent on communication skills, but relationships are two-way. This module equips leaders with tools and approaches that better enable them to stay in tune with where their people are really at. Improved listening skills help build trust and rapport as well as provide a foundation for business decisions that will get sustained traction.

### Asking the Right Questions (0.5 session)

How do you as a leader stay in touch with what is really going on? How do you draw out the information that lies beneath the surface of polite workplace conversation protocol? This module dives into the often ignored skill of enquiry and gives participants a framework that enables them to develop their capacity to ask the right questions at the right time. Improved enquiry skills mean that meetings are more effective, relationships are stronger and people become more engaged in their work, resulting in higher performance.

### Having Difficult Conversations (0.5 session)

One of the fundamental differences between high performing and ineffective leaders is their capacity to engage difficult conversations in ways that respect the people involved and yet don't compromise business imperatives. Improved competency in this area is insurance against future regret. This module explores the typical scenarios that require difficult conversations and will equip leaders to make better choices about engaging them.

### Public Speaking (I session)

It has become folklore that most people rate public speaking higher on the list of most feared events than death. For positional leaders, shrinking from being up front is not an option. This module gives participants practical tips on preparing for and facilitating group conversations and delivering presentations. It also includes a section on effective use of Microsoft PowerPoint (or equivalent).

### Emails (0.5 session)

If ever there was a business tool that has become a blessing and a curse simultaneously, email is it. How do we manage 'inbox addiction', for ourselves and our teams? Our organisations are experiencing a huge productivity hit due to our inability to make wise choices regarding email. This module includes practical ideas that empower leaders to make the most of email and internet technologies for improved productivity rather than out of control time wasting.

### Coaching (I session)

The changing dynamics of workplaces have put increased expectation on leaders to be mentors and coaches. Indeed, the competition for talent puts pressure on employers to ensure their best people are supported in their personal and professional development. This module gives leaders a simple and proven framework for coaching relationships so that the organisation's investment in people is rewarded with improved performance, an outcome that is satisfying for all parties.

### Feedback (I session)

Everyone needs feedback. Feedback is the missing dimension in a work-life where all I've got is my own perspective on my performance. But it's hard to see when my eyes are on me'. Giving and receiving negative feedback is one of the most de-prioritised leadership activities. Instead we complain to our peers, cross our fingers behind our backs and hope that things will get better. On the positive side, a timely word of encouragement can literally change someone's whole self perception and career. This module explores the barriers and incentives associated with giving and receiving feedback, and empowers leaders to get on with it.

### Telling to Co-Creating (0.5 session)

Our personality style typically becomes the default authority for us in engaging groups of people in decision making. Unfortunately, to effectively drive our organisations forward and recruiting stakeholder buy-in in the process, we are required to adopt a variety of postures. Sometimes it is right to simply 'tell'. Other scenarios require greater 'consultation'. This module introduces a simple yet powerful model that allows leaders to appreciate the business impact of inappropriate engagement postures and become better at choosing the most appropriate one for any given context.

# Working in Organisations

## Cultivating a Clear Vision (I session)

Effective leadership delivers defined outcomes that are aligned with a clear and compelling vision. This workshop facilitates a process whereby participants clarify what exactly it is that they are intending to achieve, arrive at some definitions of measurable success and a communications strategy that optimises the possibility for buy-in from stakeholders. Without a compelling vision, leaders lack the compass that orientates and informs decisions, this session provides the opportunity to avoid directionless leadership.

## Staying in Touch with Reality (0.5 session)

Leaders make decisions based on what they know at the time. Unfortunately the data that decisions are based on is incomplete in both qualitative and quantitative ways. This workshop helps leaders examine the mechanisms they use or could use, both formal and informal that allow them to glean an accurate picture of their organisation's realities.

## Generative Organisations (I session)

Generative organisations have a special capacity to engage the best energies of people so that the work environment is vibrant and the very experience of working there is life giving. Further, the nature of the products and services means that the success of the organisation helps create a better society. This module introduces the theory of Generative Organisations and a new assessment methodology that can be used to diagnose the health of an organisation on 16 different dimensions.

## Meetings (I session)

People famously complain about how many meetings leaders end up sitting in. But for many leaders, meetings are the core medium via which they do their job. It is therefore a travesty that so many of our meetings are inefficient and in too many cases a waste of time. This module equips leaders to reclaim meetings as a sharp tool of their trade. It will address facilitation and participation as well as exploring the implications of different approaches such as teleconferencing.

## Systems Thinking (I session)

Arguably the most influential business book in the last 10 years, Peter Senge's 'The Fifth Discipline' argues that Systems Thinking is a fundamental organisational leadership skill. This module will introduce the concepts and tools that enable leaders to think in terms of whole systems, rather than simply the interaction of parts. Applied wisely, systems thinking will improve a leaders capacity to make decisions that will result in the desired outcomes, rather than experiencing the frustration associated with unintended consequences undermining their best intentions.

## Change (I session)

It has been wisely said that change is not what causes people pain, it is the transition. This module helps leaders understand the phases associated with any transitions and provides tools and tips to lead people through them. It includes a discussion of organisational grid lock and effective strategies to move forward.

## Communication & Collaboration Tools (I session)

How do leaders keep their teams updated and resourced with the information they need? How does an organisation maintain quality control over their brand and the proliferation of documents that get sent around? Isn't there a simple and effective way for documents to be stored, accessed and tracked electronically? This module engages and explores these and other questions related to communications and collaboration. Participants will examine their own needs and will be introduced to possible solutions, along with pitfalls to be avoided and tips for effective use.

## Leading Teams (0.5 session)

All leaders achieve their objectives through collaboration with other people. When people come together to work, they form a team. Teams can serve a huge variety of purposes and can operate with different sets of protocol. This module helps leaders appreciate how to form and lead teams in ways that suit the context with regard to; size, decision-making, communication media, geography, timelines and purpose. At the end of the day, the time people invest in working together is too precious to waste, this workshop will equip leaders to be better team members and more effective team leaders.

## ARO (I session)

In today's increasingly complex workplaces, employees and leaders often complain of a lack of clarity in their roles. Successful organisations cannot afford for their people to be fluffing around doing busy work instead of persevering through adversity to deliver key outcomes. This module introduces a framework to liberate organisational leaders and their teams from the irrelevance of three page job descriptions and the lack of accountability associated with working to the clock. The framework differentiates personal accountability, mutual responsibility and shared ownership. Integrating the framework into existing processes will improve focus and discipline across the whole organisation resulting in higher performance against organisational strategic objectives.

# Foundational Leadership Workshops

## Working on Projects

### Project Lifecycle Overview (I session)

There are numerous project management methodologies. We have chosen not to focus on a single methodology. Instead we use a generic framework derived from the principles or concepts that have proven to be most effective and consistent across the different methodologies. This framework allows us to adapt our workshops to address your specific methodology or provide you with an effective framework for the successful delivery of your projects. This module will provide an overview of the key components for each stage.

### Planning & Monitoring Tasks (I session)

Many project managers live their life in this area. Often they will create very impressive detailed project plans. They will often live and die by their plan. One very important fact to keep in mind is that the plan is not the project. The purpose for creating a project plan, or as we will refer to as a task list, is to maintain focus, coordinate efforts and ensure that the project outcomes are achieved. It does not matter if you create it in Microsoft Project or write it on a white board. What does matter is that they are accurate, effective and accessible by those who are accountable for execution. This module will guide you through techniques for accurately constructing the list of tasks and strategies for monitoring them through to completion.

### Quality & Change Control (I session)

It is a fairytale to believe that any project will progress without requiring some changes along the way. Change does not necessarily mean the original plan was wrong. Occasionally the business environment external to the project may change during the life of the project, or new information may bring greater clarity, regardless of the reason, plans need to be modified and implemented. This module will provide you with a framework that will help you adapt and make any required adjustments to the project relatively smoothly and setting checkpoints to ensure the quality that is demanded.

### Engaging Stakeholders (I session)

Stakeholders are people who either will have influence over the project or will be influenced or impacted by the project. It is critical to get the perspective from each of your key stakeholders. They will see things that you cannot. Listening and understanding their perspectives will substantially help you to define, design and deliver your project more effectively. Working with your stakeholders may seem to be time consuming, however, effectively working with them will save you time and money. This module will provide strategies for effectively engaging stakeholders and define typical roles and responsibilities.

### Project Context (I session)

Projects cannot stand in complete isolation! If it is important enough for the organisation to define it as a project and allocate resources to it, the project must fit within a larger context than just itself. Isolation can be deceptive and costly. This module will guide you through key questions to help place the project in the proper context and aligned with other company strategies and initiatives.

### Risk Assessment (2 sessions)

Every project will be faced with various risks that could prevent it from being completed successfully. It is the role of the Project Leader to identify the potential risks and help navigate the team through various obstacles making adjustments as necessary. This module will work through a proven technique of identifying risks, assessing the level of risk based on their likelihood of occurrence and severity of consequence, and creating a contingency action plan for risks that exceed the acceptable risk threshold.

### Project Reporting (I session)

Communication throughout the life of a project is essential. There are a variety of communication methods that need to be employed, but one very important method is status reports. This module will provide you with techniques and templates to simplify the reporting process and help it to be most effective.

### Leadership vs Management (0.5 session)

In the context of projects, we have the choice of moving from the basis of a leader or a manager. Although aspects of managing are beneficial throughout the life of a project, learning to operate from the basis of a leader will provide greater benefits for the projects and everyone involved. Leadership requires maintaining clear vision and communicating in a way that empowers others to contribute their best to make projects successful. This module lays the foundation for looking at the various aspects of Project Leadership.

### Project Vision Document (2 sessions)

Quite often the vision or scope of a project is defined in a document at the beginning of the project. It is usually worked on, signed off, and then filed away—never to be seen again. This should never be! The vision document should be visible and dynamic. It should be referred to constantly, because it should clearly define the destination—the vision. We will work through the various components of the document together focusing on the participants specific project, which provides additional context and relevance.

### Project Lifecycle Stages & Gateways (N/A)

Understanding the various stages the project must progress through is critical for the project leader, team and stakeholders. Each stage has various roles and activities that must be executed for the project to progress successfully. There are decisions at each stage by key stakeholders that form gateways, which ensures the project progresses healthily and prevents a paralysis of analysis. The methodology or framework that we utilise is flexible, based on the best components of various methodologies and consists of the following 5 stages: Envision, (Re)Design, Explore & Build, Evaluate & Reflect, Review & Close. These 5 phases create the structure for our Working on Projects modules. Therefore, the duration of this module will be the accumulation of all other included modules. We will typically include other leadership modules to augment the Working on Projects content

## Foundational Leadership Workshops

# Frameworks & Tools



### **Intro to Frameworks (0.5 session)**

It doesn't take long in corporate land to come across a psychometric test of some kind. Why do these tools get used? How can they be assessed? How do they get abused? This module includes a short 'psychometrics for dummies' section to allow leaders to understand some basics and empower them to make good choices about these instruments.

### **Myers Briggs Type Indicator® (3 sessions)**

MBTI is the most popular and arguably the most potent personality typing instrument in use. Ergo's approach to teaching the language of difference, ensures that when people use the MBTI framework they become liberated rather than constrained, which is the unfortunate result of much MBTI training. Participants in Ergo's unique MBTI workshops report clearer understanding and greater applicability. Applications include: leadership development, conflict resolution, work-syles, planning and management, decision-making and problem solving and much more. (It also includes an assessment and report.)

### **Emotional Intelligence (EI) (2 sessions with report)**

Why do some people just seem to get ahead and succeed at work while other, equally intelligent people don't. An increasingly volume of research suggests that the answer can be found in the level of emotional intelligence, the capacity to be aware and manage one's own emotions and those of others. There are strong correlations between effective leadership and high EI. This module introduces the concepts. (An assessment and report is optional.)

### **Generative Assessment Survey (I session)**

Ergo's own proprietary tool assesses organisational health on 16 different dimensions by comparing 3 sets of data: leadership aspiration, all staff experience and employee values. The GAS report gives leaders important feedback on employee motivation, productivity capacity and organisational resilience.

### **Six Thinking Hats (I session)**

Edward deBono's Six Thinking Hats is a simple yet powerful tool to assist leaders facilitate conversations that require objective analysis and creative problem solving. It is especially helpful when emotional responses are likely to hinder a productive engagement. This module introduces the tool and provides participants an opportunity to experience it's utility.

