



## Certified Transformative Advisor Program

### Management Advisory

#### Syllabus

- I. Section One - Section One - Foundations and Level Setting
  - Foundational Concepts
    - Beginning with WHY – Vision, Mission, Purpose
    - Personalities and Saboteurs
    - 5 Dysfunctions and Leadership Styles
  - The Nature of the Work
    - What is Management Advisory?
    - Incorporating Management Coaching into your Advisory Engagements
  - Client Identification and Recruitment – Ideal Client for Management Advisory
- II. Section Two – The Human Resource Strategy
  - Brand and Culture
  - Servant Leadership
  - Leadership and Personnel Assessments
  - Responsibilities Inventory – Defining Roles
  - Hiring Strategies
  - Roadmap to Client Application – A Field Exercise
- III. Section Three – Structuring, Building, Nurturing and Pruning Teams
  - Team Alignment to VMP
  - Brainstorming and Innovation Processes
  - Goal Setting
  - Measurements and the AAR
  - Roadmap to Client Application – A Field Exercise
- IV. Section Four – Managing Teams: Execution, Scale and Accountability
  - Accountability and Incentivization
  - Meeting Strategies –
    - Maximizing Effectiveness and Execution
    - Focus
    - Meeting Team Composition
  - Healthy Tension & Confrontation
  - Mechanics of Team Excellence
  - Steps in the Review and Advisory Cycle
  - Understanding How to Drive Value
  - Putting it All together in a Monthly Engagement
  - Roadmap to Client Application



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#### Course Schedule

Session 1	2/2/21 Tuesday	3:00-5:00pm Eastern
Session 2	2/9/21 Tuesday	3:00-5:00pm Eastern
Session 3	2/16/21 Tuesday	3:00-5:00pm Eastern
Session 4	2/23/21 Tuesday	3:00-5:00pm Eastern
Session 5	3/2/21 Tuesday	3:00-5:00pm Eastern
Session 6	3/9/21 Tuesday	3:00-5:00pm Eastern
Session 7	3/16/21 Tuesday	3:00-5:00pm Eastern
Session 8	3/23/21 Tuesday	3:00-5:00pm Eastern
Session 9	3/30/21 Tuesday	3:00-5:00pm Eastern
Session 10	4/6/21 Tuesday	3:00-5:00pm Eastern