



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 and Optional Study Halls

Session 1	7/6/21 Tuesday	12:00-2:00 PM
Session 2	7/13/21 Tuesday	12:00-2:00 PM
Session 3	7/20/21 Tuesday	12:00-2:00 PM
Session 4	7/27/21 Tuesday	12:00-2:00 PM
Session 5	8/3/21 Tuesday	12:00-2:00 PM
Session 6	8/10/21 Tuesday	12:00-2:00 PM
Session 7	8/17/21 Tuesday	12:00-2:00 PM
Session 8	8/24/21 Tuesday	12:00-2:00 PM
Session 9	8/31/21 Tuesday	12:00-2:00 PM
Session 10	9/7/21 Tuesday	12:00-2:00 PM
Study Hall	7/8/21 Thursday	4:00-5:00 PM
Study Hall	7/15/21 Thursday	4:00-5:00 PM
Study Hall	7/22/21 Thursday	4:00-5:00 PM
Study Hall	7/29/21 Thursday	4:00-5:00 PM
Study Hall	8/5/21 Thursday	4:00-5:00 PM
Study Hall	8/12/21 Thursday	4:00-5:00 PM
Study Hall	8/19/21 Thursday	4:00-5:00 PM
Study Hall	8/26/21 Thursday	4:00-5:00 PM
Study Hall	9/2/21 Thursday	4:00-5:00 PM
Study Hall	9/9/21 Thursday	4:00-5:00 PM