

## Certified Transformative Advisor Program

### Management Advisory

#### Syllabus

##### Section One - Section One - Foundations and Level Setting

- 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

##### Section Two – Advising the Senior Leadership Team

- Alignment Begins at the Top
  - Vision, Mission, Purpose defined
  - Leadership Assessments – Personalities, Saboteurs, DISC
- Brand and Culture
- Servant Leadership

##### Section Three – Advising the Organization

- Building the Org Chart: Mapping Roles and Responsibilities within the Organization
- Hiring Strategies
- 5 Keys to Dynamic, High-Performance Teams
- Building an Objective-Minded, Accountability-Driven Organization
  - Brainstorming and Innovation Processes
  - Goal Setting
  - Measurements (e.g., KPIs and OKRs)
  - Review Cycles (e.g., AAR)
- Meeting Strategies

##### Section Four – Building and Nurturing Company Culture

- Vision, Mission, Purpose throughout the organization
- 4 Key Value Types
- SWOT Analysis

##### Section Five – Managing Teams: Execution, Scale and Accountability

- 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

All times shown in Eastern Time Zone

Session 1	2/9/22 Wednesday	12:00-2:00 PM
Session 2	2/16/22 Wednesday	12:00-2:00 PM
Session 3	2/23/22 Wednesday	12:00-2:00 PM
Session 4	3/2/22 Wednesday	12:00-2:00 PM
Session 5	3/9/22 Wednesday	12:00-2:00 PM
Session 6	3/16/22 Wednesday	12:00-2:00 PM
Session 7	3/23/22 Wednesday	12:00-2:00 PM
Session 8	3/30/22 Wednesday	12:00-2:00 PM
Session 9	4/6/22 Wednesday	12:00-2:00 PM
Session 10	4/13/22 Wednesday	12:00-2:00 PM
Study Hall	2/10/22 Thursday	12:00-1:00 PM
Study Hall	2/17/22 Thursday	12:00-1:00 PM
Study Hall	2/24/22 Thursday	12:00-1:00 PM
Study Hall	3/3/22 Thursday	12:00-1:00 PM
Study Hall	3/10/22 Thursday	12:00-1:00 PM
Study Hall	3/17/22 Thursday	12:00-1:00 PM
Study Hall	3/24/22 Thursday	12:00-1:00 PM
Study Hall	3/31/22 Thursday	12:00-1:00 PM
Study Hall	4/7/22 Thursday	12:00-1:00 PM