

Certified Transformative Advisor Program

Management Advisory

Syllabus

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

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

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

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