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DRAFT

Manage to Lead:

The Team Path to Breakthrough Performance

Instructors Manual

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Table of Contents

MtL PC Course Guide Overview

This document contains background material that MtL Instructors, Principal Consultants and Coaches (PCs) will find useful in orienting themselves to the program as a whole and to each of its ten modules. The following sections provide essential readings and guidance for navigating the content and engaging with the program effectively.

Summary:

- **Section I:** Focus on understanding the foundational material and context provided. This will give you a solid base to grasp more detailed concepts later.

- **Section II:** Pay special attention to the instructions and expectations for these sessions. This will help you prepare effectively for interactive components.

- **Section III:** Familiarize yourself with each module's outline before it starts.

Note:

- If you encounter any ambiguities or have questions about the material, don't hesitate to reach out to the instructors. Be as specific as possible about what you need help with.

- Keep in mind that this guide and its content are continually evolving. If you have suggestions for improvement, please document them and share them with the instructors. While changes are unlikely to be made during the current program, all feedback will be carefully considered to enhance future iterations.

- Your role is to align with the program's objectives and help bring them to life. Aim to understand what we're working to achieve and support that vision.

- During live sessions, participate fully, just like everyone else you're learning too! However, encourage participants to take the lead before coaches or PCs step in. Avoid dominating the conversation or introducing models or frameworks outside the scope of the program. We're already working with a rich set of concepts, and our focus is on mastering what's in the curriculum.

- Thank you for your commitment and for helping us make this experience as impactful as possible.

I. Background and Reference Reading

The following provide background on key points regarding how MtL is set up, how it works, and what it seeks to accomplish.

Principal Consultant Background

- Benefits to PCs Taking a Team Through MtL
- PC Role Description
- Note on Group Dynamics for MtL PCs
- Roles and Expectations
- Guide for Initial PC Meeting With Team Leader

Tips and Aids

- Program Content
- Breakout Facilitation Tips
- Instructions for using IntelliVen Operations Advisor (IVOA)
- IVOA Sandbox Users Guide
- Outside Executives Background
- Live Executive Session Briefing Guidelines
- Final Submission Templates
- Final Submission Score Sheet

Miscellaneous

- Open items to address with Maven
- Participant Broadcasts ahead of each module
- Manage to Lead Summary Podcast
- Course Play List

II. Guidance For All Modules

Review and digest the guidance in this section to be applied for every module.

- **Pre-Live-Session Preparation:**
  Review the MtL content (readings, videos, practice cases, input prompts) on Maven for the associated module

  Review Participant Input:
    - Access the **Project Tab** on Maven to review participant input.
    - Identify and bring to the attention of your team leader any issues that should be addressed or noteworthy contributions from team members.

  Review the "Before Module X Live Session" guidance in Section III. of this document, below, to familiarize yourself with the necessary actions ahead of and during the upcoming live session. Let instructors know if you would like to see live session slides or a recording from a previous cohort ahead of a live session.

- At the bottom of the syllabus on Maven, there is a section called "Follow-on Materials by Module." Please review this content as part of your module preparation to expand your knowledge and bring relevant items to your team's leader.

  Note:

  Maven does not support:

    - Survey input collection.
    - Easy export of student input to program prompts.
    - Aggregation of participant input by team.

  Consequently:

    - One of the key PC roles is to assist team leaders in accessing and processing team member input to prompts on Maven. Towards that end, you may need to guide the team leader on how to copy and paste input from Maven into the workspace of their choice (e.g., Google Drive, Slack, MS Teams).

    - Some principal consultants have been willing to compile a spreadsheet with participant input to share with the leader, who may then distribute it to the team. This is optional and can be time-consuming. If you choose not to compile input, ensure to guide the team leader on how to manage and process participant input efficiently.

- **In-session Breakout Instructions:**
  - Use the **SLIDES** button on the live session event entry on Maven to access Breakout Instructions prior to or during a live session. Download, or make a copy of, slides to markup during the breakout as needed

  - The **SLIDES** link will be updated with a link to the live session slides shortly after the session ends.

- **Post-Live Session Breakout:**
  - Develop a plan to discuss submitted input during the post-live session breakout. Be sure to appreciate participants' efforts, help the team consolidate key points from the live session, and advance their understanding and progress applying MtL artifacts to their case.

  - Help the team develop a plan to implement what they have learned between live sessions. Work may begin in this breakout but surely will not be completed.

  - Breakout instructions for each session include suggested topics to discuss with the team in addition to the following standard prompts:
    - What sticks with you from today's session?
    - What will you do with what you learned?
    - What questions do you have?
    - What would you change?

III. Module by Module Guidance

Review the guidance module-by-module as the program progresses.

Module 0.0 Kickoff and Orientation Meeting to Launch and Align (ahead of first live session)

- Hold a one-on-one with the leader, then meet with the full team before Module 1 Live Session.
- In both meetings, learn each person's background, role, goals, and concerns for themselves, the organization, and one another.
- Get a sense for what the organization does and seeks to achieve, how it is going, and where each team member is on their growth path.
- Set a cadence for follow-up touch-points with the leader and the team between live sessions.
- Agree on preferred communication channels (text, email, phone, Slack, etc.).
- Confirm every participant has:
    - accepted all calendar invitations,
    - logged in to Maven and completed their profile,
    - started the Getting Started and Ramp Up modules and is on track to finish them before the first live session.
    - Been made aware of the Additional Resources (IVOA, Sandbox, Tools, Text, Follow-on materials, etc.) explained in the Getting Started module.

Module 1.0 Ramp Up

Please be sure to do the following ahead of our first PC prep session:

1. **Enter our cohort on Maven** and work through Get Started and Ramp Up modules. Note, please access MtL via the MtL LoginIn option on the intelliven.com top menu to have easy access to all the other MtL support artifacts (Sandbox, IVOA, Toolbox, Videos, Posts, and Insights).

2. **Check out the** module 1 live session breakout instructions on Maven Slides for the first live session event.

3. **Review the PC guidance Sections I, II, and III Module 1** in this document.

In module 1 we aim to:

- Help participants get acquainted with their fellow cohort members and principal consultants.
- Introduce the use and structure of breakout sessions.
- Experience how live sessions will be conducted throughout the program.

- Emphasize the importance of aligning on basic concepts, such as the meaning of words and the lifecycle of ideas from inception to implementation.
- Highlight the need to think deliberately about aspects that are often approached unconsciously, such as what they seek to accomplish, working on initiatives and setting strategy.
- Begin working with MtL tools to codify what their organization seeks to accomplish, by when, i.e., their Mandate and their current progress along those lines i.e., their Enterprise Change Framework (ECF).

  Note:
  On Maven we have two input prompts not covered in the live session but useful for leader–team discussions:
    - What animal or image describes your organization now?
    - What animal or image describes your organization next?

  Encourage your team's leader to review these responses and decide if, how, and when to explore them. They often spark valuable conversation about the group as a whole and individual members.

  In the live session we also mention, but do not work on, personal mandates. These, too, can be taken up later with the team leader and team members.

Pre Session Preparation:

1.2: Understanding the Idea-to-Benefit Cycle

Participants often have diverse views on their position along the Idea-to-Benefit cycle from their customers' perspectives. During the live session, we explore their self-perceptions in the eyes of their customers and also their views on their progress with internal initiatives.

For both internal and customer-related work, a key takeaway is that ideas advance to implementation through a series of steps. MtL provides tools and methods to improve the effectiveness of these steps and help ensure that ideas achieve their intended benefits.

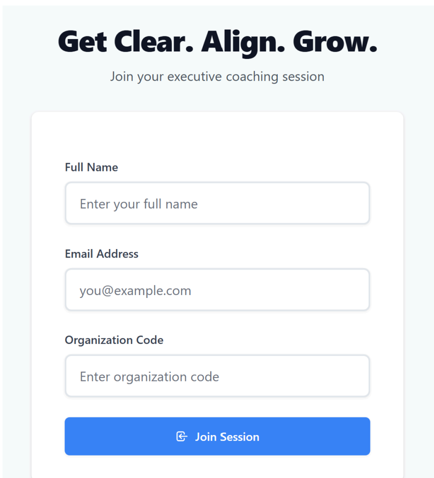
1.3: Aligning the Meaning of Key Words

The intentional disparity in responses during the participant matching exercise highlights that people often interpret the same words differently, and that different words can sometimes convey similar meanings.

The key lesson is to collaborate with teammates to navigate these differences and achieve clarity and alignment. This exercise underscores a recurring theme in MtL: the importance of understanding and aligning diverse perspectives through facilitated collaboration.

1.4: YOUR CASE

- In the live session the second breakout is for teams to work on their Organization's Mandate. Guide team members to use the [IntelliVen Operations Advisor (IVOA) Sandbox]() to enter their Mandate, generate assessments and suggestions, review similarities and differences, and to suggest a consolidated version.

  At the end of the live session, teams will again enter their Sandbox to begin work on their Enterprise Change Framework during a third breakout.

- Participant Frustration and Expectations:
  - Participants may express frustration about not being able to definitively assert a consolidated Mandate or Enterprise Change Framework (ECF).
  - This is expected and desirable, as the need for these will become clear and evolve throughout the program.
  - By Module 6, if participants still haven't finalized these elements, we will ask them to assert a version to guide them through the remaining modules.

Module 2.0 Get Clear WHAT-WHO-WHY

In this module, participants discover that many organizations are not always what they appear to be. When working with a team to build or enhance an organization, it is crucial that all members share a precise understanding of the organization's definition. Aligning on this definition ensures that everyone is on the same page and leveraging their individual strengths towards a common goal.

First Breakout: Work on WHAT, WHO and WHY for a well-known organization.

- **Duration:** 10-minutes
- **Groups:** Mixed
- **Objectives:**
  - Work towards achieving clarity and detail as demonstrated in the main room.
  - Learn to iterate with the W-W-W Tool in the IVOA Sandbox

- **Tasks:**
  1. Enter and submit a W-W-W for a well-known org.
  2. Iterate based on generated feedback.
  3. Consolidate to see similarities / differences between individual entries.
  4. Infer from website.
  5. Consolidate to see similarities / differences between consolidated individual entries and the website.
  6. Discuss how the group worked
  7. Prepare to report out in the main room

Note:

- Mixed breakout groups foster engagement and strengthen cohort cohesion as participants across teams get to know each other.

- At this early stage, breakout groups often struggle to complete tasks within the allotted time. Participants are still learning to prioritize time spent judiciously on tasks and to even follow instructions. For example, it's common for teams to overlook assigning a spokesperson or documenting group findings. These skills will develop over time. It's acceptable for them to face challenges with these aspects at this stage.

Second Breakout: Refining and Consolidating their team's WHAT-WHO-WHY

Duration: 30 minutes (note: aim for insight and progress, not completion)

Use the IntelliVen Operations Advisor (IVOA) Sandbox to generate assessments and suggestions for your team's W-W-W entries.

Specifically consider working through some or all of the following:

1. Read entries out loud to each other.
2. Tweak based on today's session and resubmit.
3. Iterate as desired.
4. Consolidate individual entries to see similarities, differences, and suggested consolidation.
5. Infer W-W-W from website and / or fact sheet, management presentation, etc.; compare with suggested consolidated version.
6. Revise and resubmit consolidated version as desired

Key Point: The team may be confused by differences in their views on the Ws and uncertain about which direction to choose. Remind them that it's okay not to have all the answers at this stage. As they move towards Module 5, clarity will emerge, and they will soon be able to finalize a consolidated W-W-W to use through Modules 6-10.

Answers to Input Prompts:

#	Question	Correct Answer / Expect
1	**Why is describing your Ideal Customer Profile harder than it first appears? List two reasons.**	Cognitive load (holding 3 dimens functional bias (role-based blinde thinking (treating ICP as fixed), o misalignment across the team.
2	**Which of these statements best explains "functional bias"?** A. Teams freeze under pressure and avoid decision-making. B. People focus on the W that aligns with their role and neglect the others. C. Leaders underestimate external competition. D. ICP changes only when the market changes.	**B**

3	**Match each trap to its description.** i. People cling to the W most tied to their job. ii. Leaders think ICP is a one-time task. iii. Holding WHAT-WHO-WHY simultaneously taxes working memory.	**A. Cognitive Load – iii** (brain drops detail) **B. Functional Bias – i** (role-based lens) **C. Static Thinking – ii** (treat ICP as checkbox)
4	**True or False:** If different executives give different answers to any of the three W's, they're effectively running different businesses.	**True**
5	**Fill in the blank:** "A business exists to _____ a problem for a customer."	**solve**
6	**List the four options a leader has when the team's WHAT-WHO-WHY answers diverge.**	1. Assume alignment 2. Ignore differences 3. Mandate one answer 4. Collaborate to curate a shared solution
7	Your product lead says, "Our WHAT is 'saving clients money.' " Which W is missing or misstated, and why?	Saving money is a **WHY** (benefit). A proper **WHAT** is the tangible product or service delivered.

8	**Which customer is closest to an *ideal* WHO?** A. “Enterprises in healthcare” B. “Hospitals with 200–500 beds evaluating EMR upgrades” C. “Any organization that values efficiency”	**B** – specific decision-maker context
9	**Select all that apply:** The IVOA Sandbox helps a team… 1. Surface misalignment 2. Compare ICP to website messaging 3. Replace in-person feedback 4. Suggest clearer language	First two only
10	**In one sentence, explain why the ICP must evolve over time.**	ICP changes with new people, tech, competitors, offerings, and market shifts—so it requires continuous refinement.

Module 3.0 Get Clear HOW

In this module, participants learn that every organization operates with three core processes, each at a stage of maturity. They learn to create a process diagram and to identify which of the three core processes most constrains their organization's performance and growth.

Pre-Session Preparation: Review your team's participant input on Maven Projects tab for 3.2 - 3.4.

Session Structure: This session includes one breakout and several polls. The instructor team will manage the polls. You are encouraged to participate in the polls.

During the Breakout:

- Mixed teams will work on consolidating their submitted processes, entities, data stores, and flows for the Bank Case input. This task should be relatively quick.
    - The main focus should be on constructing a process map that logically integrates all elements.

    - Teams often struggle with recording and presenting their work. It helps if you are able to assist them by:
        - Accessing and downloading the provided templates from the breakout instructions.
        - Taking notes for the team or designating a participant to handle so doing.

- In this module, participants learn the basics of process mapping, a valuable tool for ensuring alignment within a team and understanding business processes. While process mapping can be complex, its primary benefit lies in grasping the fundamental elements and how they connect to represent current or desired processes. Your role is to guide those new to process mapping, helping them avoid feeling overwhelmed and ensuring they don't get sidetracked by excessive detail. Emphasize the importance of using process maps to align teams and identify opportunities for improvement when it's beneficial.

Module 4.0 Get Clear HOW WELL

In this module, participants learn to assess their organization's performance by comparing current results with past performance, planned results, and the performance of similar organizations. The focus is on identifying and monitoring measurable indicators to evaluate progress. While financial measures are used to illustrate these concepts due to their universal relevance to organizational viability, the methods apply broadly to all types of performance assessments. The main objective is to understand which indicators to monitor for evaluating progress. This may be straightforward for some teams, but those from subordinate or nonprofit organizations might face challenges. Assistance should be provided to help them identify relevant metrics. Remember, metrics must be quantifiable but do not necessarily need to be financial.

- **Disappearing Revenue Case:** In this exercise, participants work in breakout groups by team to determine strategies for addressing a significant reduction in revenue or funding, based on their preparatory submissions. An often uncomfortable but necessary aspect of this discussion is the potential need to reduce headcount. This tension is expected and acceptable.

  During the full session, we will explore the reasoning behind these decisions and the strategic approach to managing such cases. We'll discuss why, in some situations, it may be preferable to help a few individuals find new opportunities rather than risking the long-term viability of the entire organization.

- **YOUR CASE Briefing:** Guide your team to prepare a ~5-minute presentation on an aspect of their MtL applications; e.g., using one or more of the first few Final Submission Templates. The objective of this exercise is for the team to share how they have applied what they've learned so far in the program. While some may feel apprehensive due to perceived risks and fears of vulnerability, preparing, presenting, getting feedback, and reflecting on their performance will be highly beneficial. This exercise serves as a mini-step towards the more comprehensive presentation in the Module 10 Executive Live Session.

Module 5.0 Get Aligned

This module's live session begins with leaderless breakout groups for the stick figure exercise. The goals for each group are to:

- Ensure all participants share their stick figure of a leader in action.
- Consolidate a group stick figure
- Prepare to present their results in the main room.
- Reflect on the group's work.
- Complete these tasks within the allotted time.

The exercise underscores the importance of various acts of leadership and their diverse manifestations. Participants will practice "helicoptering up"—stepping back to observe both themselves and their group in action—and making conscious decisions about their role in the moment. This approach aids in using personal leadership skills (i.e., conscious use of self) to advance group objectives. It enables a significant step towards learning to **Manage to Lead**, starting with effective self-management.

The stick-figure exercise challenges a leaderless group to come up with a consolidated figure. As the PC, your job is to stay silent and to observe carefully how the group transitions from sharing their individual drawings to drawing a consolidated version. Things to watch for:

- Taking too much time sharing in order to put off the harder task of consolidating
- Everyone demurs such that no one puts forward a first cut at a consolidated drawing
- Someone just steamrolls the task. Who? Why did others let the person take the lead?
- Did anyone dominate the discussion?
- Did anyone sit back and let the others do all the work?
- Did the group reflect on how they worked?
- Did the group make a plan to share what they had come up with?

The key point of this exercise is that you can't facilitate a consolidated drawing. Someone has to DO something to make the leap from individual figures to a consolidated drawing. How did this happen? Was there evidence of leadership along the way?

The second exercise is a cohort role play using a fishbowl approach. Your job is to observe carefully and to comment on what you noticed when called upon.

In the Post Live Session Breakout, work with your team to:

- Review how well the cohort learning environment is working.

- Coach your team leaders to look carefully at 5.6 YOUR CASE prompt responses...especially to question 3 as there is some incredibly important/useful information from team members for them to work with. It may well be worth spending time with each member sharing their entry with the rest of the team for discussion. The question comes from Lencione's five dysfunctions of a team. It is designed to test for and induce vulnerability. The opportunity to capitalize on having done so should not be missed.

- Determine which Mandate, ECF, and W-W-W elements will serve as YOUR CASE for the remainder of the program. If the team struggles to make a decision, work with the leader to make selections. Remind the leader that it is a leader’s job to make the decisions that need making. Even if the selections may not reflect a final "right" set, it’s important to have definitive choices for modules 6 through 10.

- Ensure that the team is on track to recruit an outside reviewer of some standing for executive live session 10.

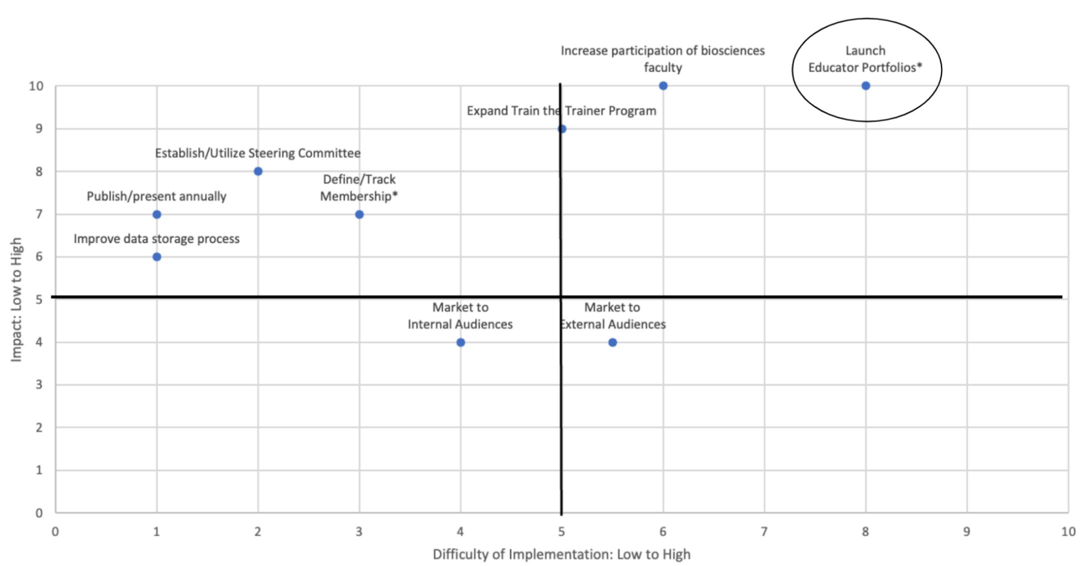
Module 6.0 Plan Change

Your Case Breakout:

- Teams will use MtL tools to create a table listing their initiatives, rated for ease of implementation and expected benefit. They will then generate a heat map to visualize which initiatives offer the most benefit with the least effort, helping them select one initiative for further development.

Initiative Name	Difficulty of Implementation (1=Easy, 10=Hard)	Expected Value	Lead
Establish/utilize Steering Committee	2	8	Alicia
Define/Track Membership	3	7	Claire
Improve Data Storage Process	1	6	Claire
Publish/Present Annually	1	7	Alicia
Launch Educator Portfolios	8	10	Lars
Increase Participation of Biosciences Faculty	6	10	Julie
Expand Train the Trainer Program	5	9	Christine
Market to Internal Audiences	4	4	Not current focus
Market to External Audiences	4	4	Not current focus

Encourage teams to use the provided Excel Heat Map template to simplify the process.



Heat mapping tips:

- If initiative names run on top of each other, number or code them to take less space on the heat map.

- Reassure participants that having (too) many initiatives is a good sign. Earlier modules (2-4) were designed to inspire this kind of thinking, and many will now have an “aha” moment, recognizing that they’ve been building toward identifying key improvement initiatives. When the number of initiatives is large enough to make them hard to read on the heat map,, organize them by type (e.g., Overhead, Revenue, Operations) and prepare a separate heat map for each type.

- Rate ease of implementation and expected benefit using either an H-M-L scale or 1-10. Simplicity is key—more complex assessments are ok but aren’t necessary for this exercise.

Finally, help teams navigate the common challenge of distinguishing between **Goals**, **Initiatives**, and **Tasks**—a critical step in this process.

- Teams should be ready to present their selected initiative to the full group for feedback, as it will serve as their focal point for the remainder of the MtL program.

Post-Live Session Breakout: Guide the team to prepare for a review with instructors to seek approval for their **Enterprise Change Framework** and one **Initiative Change Framework**, which will guide their work through the second half of the MtL program.

Module 7.0 Do & Review

In the Module 7 live session, we'll begin by working on Utilization Matters Part A as a cohort in the main room, based on participant prep.

For Part B, participants will break into mixed groups to complete the second half of the Action Review. Each breakout group will explore what happened, offering possible explanations and implications (i.e., WHY did it happen, SO WHAT, NOW WHAT):

- 15 min: Breakout with your team to address:
    - Why might this have happened? (WHY)
    - What lessons did we learn? (SO WHAT)
    - What should we do next? (NOW WHAT)

- 15 min: Return to the main room to explain group responses.

- 5 min: Discuss what happened.

Encourage teams to think creatively about all potential causes for the results. Teams often settle on one or two reasons and feel they're done—push them to keep exploring. It's almost certain there will be explanations they hadn't considered.

This breakout is also a good opportunity to reinforce the importance of **making a plan to complete all tasks within the time allotted** and **in which to helicopter up**. These are key skills for success in the Executive Live Session 10, where each team has 45 minutes to work with outside reviewers. The last thing we want is for the team to return and say they didn't have enough time. The amount of time is fixed—their job is to make the most of it.

Early-stage teams often have an overdeveloped bias for action, which can leave little room for deep reflection. Guide them to think critically about what happened, why, what they've learned, and how they can act based on those insights.

In the Post Live Session discussion, we suggest focusing on the following Module-Specific Prompts**:**

- What will serve as the Mandate for their case? (Note: be free to make one up if necessary)
- What needs to be done to firm up an Enterprise Change Framework for YOUR TEAM's CASE?

See the Follow-On material in Module 7 for live examples of how MtL tools help consultants grow their practice while guiding leadership teams to get clear, aligned, and on track.

- *What really happened in the GemCo case*
- *MtL in Action: A Case Study in Using MtL to Build Your Consulting Practice and Your Client's Success*

Note: team leads should invite their Executive Reviewer(s) to Session 10 per instructions that will be sent in this week's Preparation Broadcast. Here is background we ask them to share with their reviewer(s).

Module 8.0 Get Help

Organization Dilemma Case

- We will break participants into three mixed groups representing different constituent perspectives (customer, function, region).

- Your job is to assist the group in developing a recommendation to the CEO on how to organize based on their perspective and their rationale. They do not have to lobby for their perspective. I.e., the group representing customers can decide to recommend organizing some way other than by customer. They are also not limited to the three choices.

- In the main room we will assign someone (instructor or PC) to serve in the role of leader. Each of the three reporters will present their recommendation with justification in turn. The leader listens carefully and asks one question of each reporter:

    - If the reporter suggests organizing by region, ask: **what do we do about customers that cross regions (like O&M)?**

    - If the reporter suggests organizing by function or customer, ask: **what to do about others feeling demoted?**

- **Note:** keys to this case:
    - The decision is difficult because some of those now reporting to the leader will end up reporting to former peers. Most participants won't get to this in their prep or breakout.

    - The leader is fearful to make the decision so avoids making it by looking for an elusive right answer. The point is that there is no right answer and the real challenge is to keep team members on board with whatever answer the leader selects. See this post on the subject.

Ogilvy & Mather Case Session

- **Activity**:
    - Participants will have already viewed the classic Charlotte Beers video as part of their preparation. We will show it again in class. The insights shared in this case continue to resonate, especially as the industry has evolved through the internet, social media, and now artificial intelligence.

      The goal is to encourage participants to use MtL tools as a framework for assessing any case. This session focuses on a retrospective analysis, empowering participants to apply these tools to every case they encounter in the future.

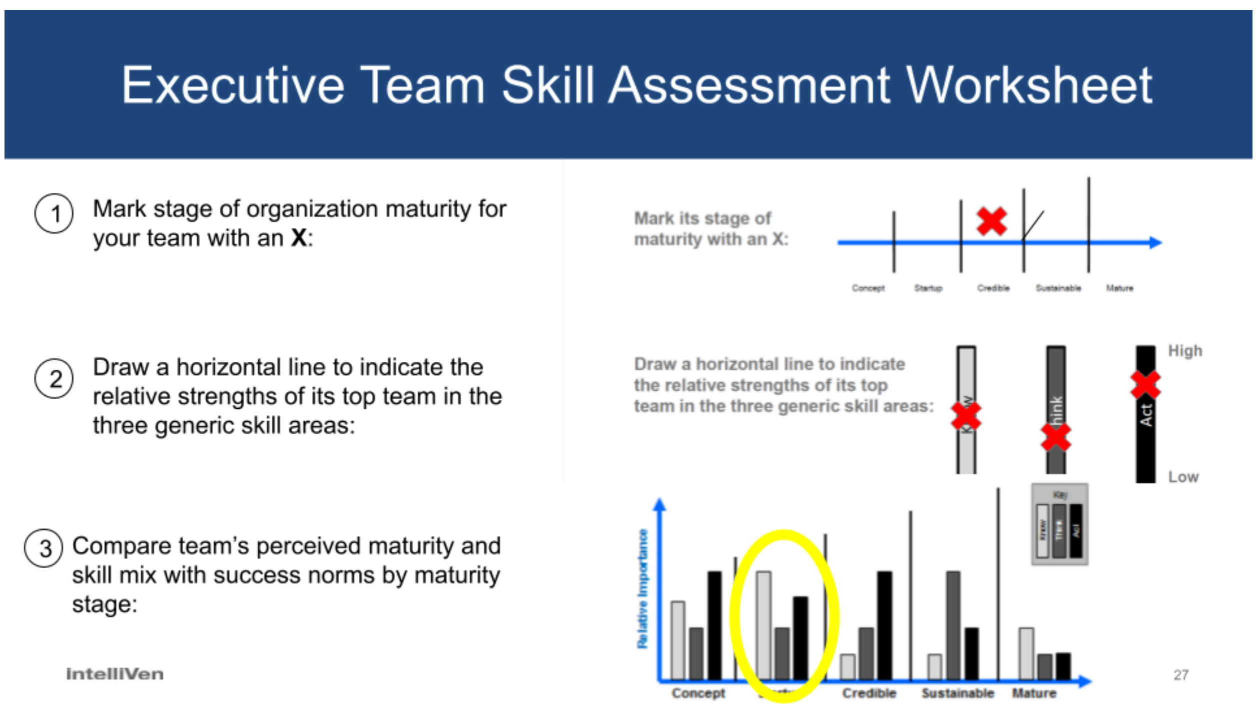
- **Group or Breakout (depending on number of participants and time to work with) Discussion**:
  - Do you agree with Charlotte Beers's assessment of the situation?
  - How have expectations about leadership style changed over time?
  - How does Charlotte's approach align with the practices covered in MtL?

Module 9.0 Grow

- Preparation includes reviewing video content presented by Dr. Green, which is guaranteed to offer novel and engaging insights. Encourage your team leaders and members to reflect on this material and be ready to share thoughtful comments and questions during the live session.

  Encourage teams to submit their responses to **9.2** and provide their assessment of their organization's **maturity stage** and **skills mix** in **9.3**. We will review submissions in the live session to highlight key takeaways.

  It's common for teams to rate themselves as more mature than they truly are, and their skill mix often aligns with the benchmark for an earlier maturity stage. This is intentional as it helps uncover important insights and encourages teams to be more self-aware and deliberate in developing the ideal skill mix for their actual maturity level and to proactively prepare for the next.



- We will break out by team for members to compare their assessment of maturity stage and skill mix to develop a consensus to index into the K-T-A benchmarks by maturity stage.

- If any team wishes to present part of their brief or submission to the full cohort, they may be able to do so. Have your team leader contact instructors in advance if they would like to arrange this.

- If time allows, we will break out to work on team materials and practice briefing other cohorts in preparation for executive live session 10.

Module 10.0 Executive Live Session

Objective: Prepare teams for the Executive Live Session, ensuring they effectively gather valuable input in the allotted time.

Focus: Executive Live Session Preparation

- **Purpose:** Assist teams in preparing thoroughly for the session.
- **Clarity on Input:** Ensure teams are crystal clear on the specific input they seek. A common pitfall is spending the entire session presenting without leaving adequate time for quality feedback.
- **Action:** Help teams identify one or two key areas where they seek input.
- **Orchestration:** Guide them in planning how to gather this input effectively.

Live Session Dry Run and Role Clarification

- **Dry Run:** Coordinate with the team leader to arrange a rehearsal of the session.
- **Roles:** Encourage team leaders to clarify and assign roles to ensure maximum value from the 45-minute session. Emphasize the importance of making the best use of the time allotted.

Team Lead Responsibilities:

- **Pre-read Materials:** Send materials to reviewers, including team bios (or equivalent, such as LinkedIn profiles) and information on the organization and initiative to avoid spending time presenting live.
- **Session Opening:** Open the session and welcome reviewers.
- **Introductions:** Invite team members to introduce themselves briefly; reviewers will have been introduced in the main room.
- **Session Goals:** Clearly state the primary objectives of the review session.
- **Agenda Review:** Outline the 45-minute agenda and time allocations for each item.
- **Norms Clarification:** Set expectations, e.g., invite reviewers to ask clarifying questions as needed but hold feedback until requested.
- **Meeting Flow:** Ensure the meeting stays on track and take appropriate action if discussions deviate or extend too long.
- **Role Assignment:** Assign specific roles to team members to ensure smooth execution of the meeting.
- **Follow-up:** Send notes of appreciation and, if appropriate, solicit ongoing involvement from reviewers.

Specific Roles:

- **Clock Watcher:** Ensure the session adheres to the planned timeline item by item.
- **Meeting Recorder:** Document key points made during the meeting using a meeting record template.
- **Facilitator:** Keep the meeting focused and prevent reviewers from monopolizing the conversation or derailing the agenda.
- **Video Recorder:** Designate a team member to record the session on their PC.
- **Chat Saver:** Assign someone to save the session's chat on their PC.

By following this structured approach, Principal Consultants can effectively guide their teams to maximize the value and outcomes of the Executive Live Session.

Final Submission
Guide your team to upload to Maven or send via email to instructors evidence of their application of MtL tools and methods to their for final grading and certificate award:

- With at least three annotated upgrades from the live session.
- In an editable form (i.e., not in PDF) so we can enter comments.
- No later than midnight Pacific Time one week following the executive live session (late submissions are penalized 1-point for every day late).

Please review and provide your own comments to what the team submits, along with your completed score sheet, prior to instructor review and in time to have back to the teams our collective feedback by a week following the submission deadline.

Locally recorded Zoom sessions can be retrieved from the recording computer in the DOCUMENTS > ZOOM folder with the file named the same as the executive session review date.

Follow-on

By now, you should have a thorough understanding of your team's goals, current status, and next steps for breakthrough. If you've established a strong rapport with the leader and team, you're well-positioned to offer ongoing assistance for hire. Feel free to pursue this opportunity as appropriate. Please keep instructors informed of your plans so they can support you.

For any work procured through IntelliVen with teams provided by us, we request a sourcing fee of 15% of the revenue to IntelliVen if the work is performed independently. If you wish to continue working on the IntelliVen platform, we will enter into an affiliation agreement where 5% of revenue goes to the person who sourced the work and 10% goes to IntelliVen. Please reach out to instructors as interested for help pursuing opportunities to provide teams with additional value.

For more information contact peterd@intelliven.com.