

Lorraine McCrossan

Instructional Designer Portfolio



**READY
TO USE
COURSES**

pre-built for you to deliver

**CUSTOM
TRAINING
DESIGN**

courses we build together

<https://www.lorrainemccrossan.com>

Professional Summary

I have **20+ years** of experience **designing** courses and **delivering** them.

I have designed instructor-led (ILT), virtual instructor-led (VILT), and eLearning courses for **hundreds of clients** in various industries, departments, roles, and content areas.

I have **facilitated over 1000 client training sessions** for groups of 3-3000 participants.

With this **dual lens**, I understand what works, why it works, and how to make it stick.

Every course I design immerses people in learning, ignites discovery, boosts retention, and equips them to apply what they've learned on the job with confidence and enthusiasm.

This has resulted in **consistently high learner feedback scores**, over **90% repeat business**, and a **reputation** for reliable, seamless, and collaborative project execution.

Note on Samples

The samples shown for each project represent a selection of my work and are intended to showcase the variety of my experience, rather than every asset produced for each project.

The list under “Assets Created” for each project includes only the assets I personally designed and developed.

To respect client confidentiality, identifying details in the samples provided have been covered with grey boxes: 



ILT and VILT Program for Early-Career Software Engineers

Energizing technically sharp minds to grow into future leaders



CLIENT

Global financial services company



AUDIENCE

Technical Development Program (TDP) participants: high-potential recent graduates and early-career software engineers identified as future leadership talent



CHALLENGE

- **The Mandate:** Design a multi-day in-person learning experience to stretch and engage highly technical learners, challenge their thinking, build leadership capability, and feel fundamentally different from previous passive corporate training
- **The Scale:** Create a design to support both large-scale, all-hands sessions for up to 800 TDPs and breakout rooms for cohorts of up to 40 TDPs while ensuring consistent learning outcomes, energy, and impact for each cohort
- **The Stakes:** Manage high stakeholder expectations for my design approach and client interactions, shaped by their prior experience with other external training providers
- **The Pivot:** Redesign the entire successful, two-year-old in-person curriculum into a fully virtual format due to pandemic restrictions



SOLUTION

I designed, developed, and lead-facilitated a highly interactive 5-day ILT program for 800 participants across 20 cohorts. I included discovery-based experiential activities, insightful a-ha moments debrief discussions, and application practice to push beyond their comfort zone.

I developed and facilitated Train-the-Trainer sessions for 20 cohort facilitators and coached them to encourage participation, probe thinking, and thoughtfully challenge learners.

When COVID disrupted in-person delivery, I redesigned the program into a 3-day virtual instructor-led experience without sacrificing engagement and impact.



RESULTS

- Selected to deliver the program for a second year based on top results compared to other training providers
- Successfully transitioned the program from ILT to VILT while preserving strong learner engagement and on-the-job application
- Prepared facilitators to deliver high-quality ILT and VILT programs resulting in the highest learner feedback scores to date



ASSETS CREATED

- Design documents for ILT and VILT
- PowerPoint with facilitator SAY/DO notes for ILT and VILT
- Detailed Facilitator Guides for ILT and VILT
- Moderator Training Guide for VILT
- Train-the-Trainer Agenda
- Moderator Training Agenda

Samples of the ILT Detailed Facilitator Guide

WELCOME MESSAGE

Thank you for being a part of this exciting initiative focused on **Teamwork; Resilience; Agility; Communication and Storytelling; and Strategy and Influence**. Your role as facilitator is critical to making this training a success.

There are a few key things you are asked to do to create a highly successful training session.

- Review the facilitator guide to ensure clarity on:
 - Overall objectives for the program
 - Key outcomes and key messages for each section
 - How to run each activity, and the key messages for which they are designed
 - How much time to spend in each section
- Be prepared to make links to the **TDP program** for relevance
- Be prepared to share your own personal stories — storytelling is a great way to demonstrate your personal passion and commitment to the messages

NOTE: The client requested a very detailed facilitator guide.

Program Key Message

Experience Week is designed to celebrate the uniqueness of every individual and to arm TDP associates with the tools and competencies needed to be future leaders. TDPs will walk away with new strategies to employ when facing challenges, and a reframed mindset that embraces growth and change.

Key TDP Learning Outcomes

Teamwork

- Understand the behaviors and importance of an effective team
- Collaborate and partner within and beyond one's team to build productive relationships with others
- Practice facilitating open and honest discussion to improve team performance
- Learn to seek out and consider diverse points of view
- Learn how to deliver on accountabilities and place team goals above one's own goals

Agility and Resilience

- Understand how your view of change impacts your ability to be agile and resilient
- Develop action plans to instill ownership of changing behavior
- Explore the importance of a growth mindset while embracing change

Communication

- Understands listener needs and appropriately tailors written and verbal communications
- Delivers appropriate, direct, and straightforward information
- Creates understanding with two-way dialogue and checks others' interpretation
- Understands importance of not jumping to conclusions
- Overcomes communication challenges including networking

Storytelling

- Understand, identify, and practice using key storytelling elements
- Discover how storytelling can bring the central pillar to life

Strategy and Influence

- Understand the balance between tactical and strategic moves
- Discover how to guide, motivate, and inspire others to think differently and deliver results
- Explore how to incorporate prior experience, stakeholder needs, and learnings into decision making
- Practice balancing facts, priorities, constraints, and alternatives with common sense and intuition to make decisions

TABLE OF CONTENTS

LICENSE AND LEGAL AGREEMENT

TABLE OF CONTENTS

GETTING STARTED

AGENDA FOR DAY 2: NOV. 19

PROMISES, PROMISES! - LOGISTICS

Promises, Promises! Main Room (Regency Ballroom) Layout

Table Setup in Your Section

DAY 2 BREAKOUT ROOM LOGISTICS

Breakout Room Layout

How to Set Up Your Breakout Room for Day 2

PROMISES, PROMISES! - REGENCY BALLROOM

PROMISES, PROMISES! SECTION LEADING

PROGRAM THEME

EXPERIENCE OVERVIEW

SUMMARY OF YOUR ROLE

DETAILS OF YOUR ROLE IN GENERAL

DETAILS OF YOUR ROLE EACH YEAR

SCANDAL CAMPAIGN PROCESS

SCANDAL CAMPAIGN SCENARIOS/PRACTICE

SCANDAL CAMPAIGN "WHAT IF?" SCENARIOS

FREQUENTLY ASKED PARTICIPANT QUESTIONS WITH ANSWERS

POTENTIAL PITFALLS DURING THE EXPERIENCE

WHAT TO DO DURING THE BREAK

FACILITATOR INTRO/SOFT SKILLS - REGENCY BALLROOM

FACILITATOR INTRODUCTION

IMPORTANCE OF SOFT SKILLS

Facilitator Guide Features

The facilitator guide contains small icons for easy identification of important features.



FACILITATOR NOTE

FACILITATOR NOTE

- Insight into program design and objectives
- Insight into common participant behaviors



OBJECTIVE

OBJECTIVE

- Outlines objectives for the following section
- Intended learning outcomes



ACTIVITY

ACTIVITY

- Indicates an activity



TRANSITION

TRANSITION

- Transition to the next section



VIDEO

VIDEO OR AUDIO

- Play video or audio

Agenda

Tuesday, November 19, 2019

Location	Time	Activity	Your Role
Regency Ballroom	9:30	Intro and Promises, Promises!-	Section Leader
BREAK	11:00		
Regency Ballroom	11:15	Facilitator Intro, Importance of Soft Skills	Lead Facilitator
LUNCH	12:00		
Breakout Rooms (6)	1:15	Promises, Promises! Debrief, Intro TRACS model, Communication Gameshow, 20 in 2, Zea Video	Lead Facilitator
BREAK	3:00		
Breakout Rooms (6)	3:15	Configs-	Lead Facilitator
End Time	4:30		

Wednesday, November 20, 2019

Location	Time	Activity	Your Role
Regency Ballroom	9:30	Review of Day 2, How Storytelling Can Be Used at our company	Roving Mike Runner
BREAK	10:30		
Breakout Rooms (6)	10:45	Central Pillar, Storytelling Elements and Tips, Storytelling Practice	Lead Facilitator
LUNCH	12:30		
Regency Ballroom	1:45	Redline Racing-	Section Leader
BREAK	3:15		
Breakout Rooms (6)	3:30	Redline Racing-Debrief	Lead Facilitator
End Time	4:30		

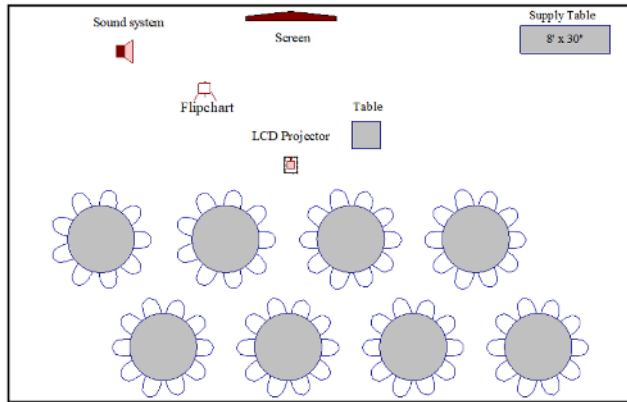
Thursday, November 21, 2019

Location	Time	Activity	Your Role
Breakout Rooms (6)	9:30	Review of Day 3, Video, Traffic Jam, Vectors of Embracing Change	Lead Facilitator
BREAK	11:00		
Breakout Rooms (6)	11:15	Evolution-	Lead Facilitator
LUNCH	12:15		
Regency Ballroom	1:30	Cornerstones of Teamwork-, Coral Banks-	Roving Mike Runner Section Leader
BREAK	3:30		
Regency Ballroom	3:45	Coral Banks-Debrief	Roving Mike Runner
Regency Ballroom	4:20	Closing Remarks	Roving Mike Runner
End Time	4:30		

Day 2 Breakout Room Logistics

Breakout Room Layout

Below is a room layout for the breakout rooms. The breakout rooms will have the same layout for each of the three days. The breakout rooms hold 80 participants. Each breakout room will have 6-8 tables with 10 chairs at each table. You will be assigned to a specific breakout room.



How to Set Up Your Breakout Room for Day 2

- Connect your computer to the LCD projector and test your PPT with your clicker
- Test the Zea video
- Set up your generic music and table talk music and test
- Flip chart to record Configs times for 3 rounds for each team
- Configs boards (1/team of 4-5 people)
- Configs Rounds 1-3 cards (1 set/team of 4-5 people)
- Mute your phone but have it visible to keep an eye on the clock

Large-Session Facilitation Tips

Presence

1. **Take a confident, comfortable stance** — you're on a stage so you need to be more demonstrative than you would be in a room of 10 people.
2. **Speak with conviction.**
3. **Never read your notes.** Reading something should only be used for effect (i.e., a quote). If reading a quote, explain that you're going to read a quote, pause and read it clearly, pause to look at the participants at key points, and say it with conviction.
4. **Understand the big picture/purpose of your content.** Everything should link back to the purpose of the module. When you know the purpose of your content, you free yourself of looking for the right answer.
5. **Talk to participants like individuals.** It's like being at a concert where the singer is singing your favorite song and it feels like the singer is singing to you, not the other 50,000 people. As a facilitator, you should talk like you're talking to the individual, not 100 of them. This creates likability in the facilitator because you're less removed from the participants. For example, ask "How did that make YOU feel?" Don't ask "How did that make all of you feel?"
6. **It's not about winning or being smarter than the participants.**
7. **When debriefing an activity, act out what actually happened** (i.e., what you saw people do during the exercise). Don't point out individual people; instead, act out what you saw several people doing.

NOTE: The Facilitator Guide instructions are also included in the notes of the PowerPoint.

Communication
Rate the quality of your communication at the end of Year 5:

1 2 3 4 5 6 7 8 9 10
Poor Excellent

ASK:

- What was communication like at the end of the experience?

DO:

- Do the same as you did for the above question

SAY:

- This highlights the relationship between quality communication and quality results

Communication
Rate the quality of your team's communication at Capital One:

1 2 3 4 5 6 7 8 9 10
Poor Excellent

ASK:

- How would you rate the quality of your team's communication at [redacted] (your department, project team, etc.)?

DO:

- Do the same as you did for the above question
- Comment on the result (It may all be low or all high or a mixture, but there's always room for improvement)

Trust

SAY (this slide builds):

- Communication builds trust. Trust improves communication. It's not rocket science.
- Think about what else happens...When communication is not clear or it's closed off, we do not get our needs met and are forced to throw scandals. In the end, the focus is on scandals and, as a team, you won't achieve your results.

- This may sound too academic so let me demonstrate what happened...Act out an *ineffective Promises*, *Promises!* communication scenario and how that discussion resulted in a slamming of the box (lack of trust). Then, you could act out an *effective communication scenario* that resulted in an opening of the box (trust). Or, you may choose to ask a volunteer to share how communication built or lost trust during the game, or on the job.)
- The quality of your communication impacts how much others trust you
- Another interesting analogy is "walking around the box." As we build trust, we build an open box environment. If we choose to manage our perceptions as we discussed earlier, we will walk around their box to understand their situation. For example, "Wow, no wonder you're so desperate! Let's get you some help!"
- Imagine if all the time spent on creating alliances to win scandal campaigns, trading scandals, and executing scandal campaigns was spent on fostering communication and building trust. How are you going to spend your time? As you ponder that question, let's remind ourselves of what happened here today.

FACILITATOR NOTE:

The purpose of the below "big picture" discussion/set of slides is to drive them to a point of choice: (1) Will you close your boxes to each other, which causes customer-facing teammates to close their boxes to our customers? (2) Do you want to live in a Year 2 or a Year 5 environment?

Communication Game Show

Time: 2:15 – 2:30
15 minutes

Materials:

- PowerPoint

OUTCOME

- Learn thought-provoking communication statistics

SAY:

- To get you thinking about communication, I'd like to welcome you to our communication game show!
- I'm your host, (your name)!

DO:

- Review the rules of the communication game show on the slide

SAY:

- There are 5 questions in total
- At the end, we'll see who got the most correct

FACILITATOR NOTE:

For each question, read the question, allow 1-2 minutes for teams to decide their answer, and then reveal the answer on the next slide. Have some fun being a game show host. This will keep the energy up. However, it's important that this isn't just a game. There are some key points to highlight with these communication statistics.

Communication Game Show
Question #1: The average person can listen up to _____ words per minute during a conversation.

- 175
- 250
- 500
- 1000

Communication Game Show
Question #2: The average person can listen up to _____ words per minute during a conversation.

- 175
- 250
- 500
- 1000

Communication Game Show
Question #3: The average person speaks _____ words per minute.

- 75
- 100
- 150
- 200

Communication Game Show
Question #4: The average person speaks _____ words per minute.

- 75
- 100
- 150
- 200

SAY:

- We can listen to about 500 words per minute, but we can only speak 150 words per minute
- No wonder we sometimes zone out while communicating!

Samples of the VILT Design Document

Pre-work

- Video intro from one of the facilitators <https://vimeo.com/123456789>
- Preparations for each topic (i.e., think of a story, etc.)
- Facilitators to advise TDPs that COVID and social justice feelings may come up during Resilience session and provide list of resources (EAP and [redacted])

Overview of Agenda

DAY 1		DAY 2		DAY 3	
Time	Section	Time	Section	Time	Section
10:00 – 10:05	Kick-off	10:00 – 10:10	Welcome & Review of Day 1	10:00 – 10:10	Welcome & Review of Day 2
10:05 – 10:20	Introductions and Overview	STORYTELLING (Continued)		INFLUENCE (Continued)	
COMMUNICATION		10:10 – 10:30	Storytelling Practice/Reflection	10:10 – 10:30	Other Things to Consider
10:20 – 10:40	Communication Game Show	CAREER STRATEGY		10:30 – 10:35	Reflection/Discussion
10:40 – 11:00	Central Pillar Explanation	10:30 – 11:15	People Leader vs Distinguished Engineer	RESILIENCE	
11:00 – 11:30	Central Pillar Practice	11:15 – 11:30	Career Progression: [redacted]	10:35 – 10:40	Resilience Introduction
11:30 – 12:00	Analogies	11:30 – 12:00	Role Satisfaction	10:40 – 10:45	Current Stress/Pressure Level
12:00 – 1:00	Mealtime and Networking	12:00 – 1:00	Mealtime and Networking	10:45 – 10:55	[redacted]
STORYTELLING		INFLUENCE		10:55 – 11:00	Resilience Definition
1:00 – 1:15	Storytelling Introduction	1:00 – 1:30	Deserted Debate	11:00 – 11:40	Sources of Stress
1:15 – 1:30	Story-crafting Process	1:30 – 2:00	Influencing Strategies	11:40 – 12:00	Symptoms and Solutions
1:30 – 1:45	Story Structure	2:00 – 2:15	Other Things to Consider	12:00 – 1:00	Mealtime and Networking
1:45 – 2:00	Structure: [redacted]	2:15 – 2:55	Hot Air Balloon	1:00 – 1:20	Symptoms/Solutions: [redacted]
2:00 – 2:15	Structure: [redacted]	2:55 – 3:00	Closing/Tomorrow	1:20 – 1:40	Symptoms/Solutions: [redacted]
2:15 – 2:30	Structure: [redacted]			1:40 – 2:00	Symptoms/Solutions: [redacted]
2:30 – 2:45	Structure: [redacted]			2:00 – 2:10	Closing/Celebration
2:45 – 2:55	Structure: [redacted]			2:10 – 2:15	Move to Fireside Chat
2:55 – 3:00	Closing/Homework			2:15 – 2:55	Fireside Chat
				2:55 – 3:00	TDP Alumni Lead Closing

There will be a 5-minute break every morning and afternoon. The time of those breaks is left to the discretion of the Facilitator.

All times are in EST.

Day 1: COMMUNICATION and STORYTELLING

Time	Section	Description (What)	Methodology (How)	Required Assets
10:00 – 10:05 5 minutes	Kick-off	• Pre-event kick-off call week of October 19: ◦ Purpose: to go over what to expect, but no exec will be involved. Instead, Todd will write a message to them. ◦ Video of [redacted] Facilitator Intro played at pre-event kick-off ◦ [redacted] Facilitators invited to attend pre-event kick-off • Introductions: [redacted] Facilitator and Experience Moderator; TDP Alumni Lead • TDP Alumni Lead recap pre-event kick-off: ◦ Message from Todd ◦ Pre-event kick-off call	• Reassign participants if less than 10 participants in the cohort	• Todd's written message to the TDPs • Recording of pre-meeting kick-off for [redacted] Facilitator reference
10:05 – 10:20 15 minutes	Introductions and Overview	• Fun, quick intro of TDPs to see similarities • Overview of 3 days	• Annotate – type name	
COMMUNICATION				
10:20 – 10:40 20 minutes	Communication Gameshow	• Using a game show theme, participants compete to answer factual questions and staggering statistics about communication • What % of your week do you spend communicating? (Slack, Zoom, email, IM, etc.)?	• Facilitator sets up polls and moderator runs them (5 multiple choice questions: A, B, C, D) • Facilitator sets up poll and moderator runs it (multiple choice: less than 10%, 10-25%, 26-50%, 51-75%, more than 75%)	

11:30 – 12:00 30 min	Analogies	- Purpose of analogies - TDP Alumni Lead and participants share examples of a great analogy they have recently heard - How to create analogies - Practice creating analogies in breakout rooms: Participants select one topic and one analogy and explain how the topic they selected “is like” the analogy they chose “because”. They provide each other feedback. - Reflection/Discussion: - Where do you need to start using analogies to be more effective and impactful in your communication? - Are there specific topics in your day-to-day that lend themselves to using an analogy? (i.e., presenting data)	Breakout Rooms (4 per room)	
-------------------------	-----------	--	---	--

Time	Section	Description (What)	Methodology (How)	Required Assets
12:00 – 1:00 60 minutes	Mealtime and Networking	- Participants choose a breakout room by its discussion topic - Health & Fitness - Barbell Club - Running Enthusiasts - Extreme Sports - Under the Sea	██████ providing one Zoom link for entire TDP group mealtime and create 5 breakout rooms ██████ rename breakout rooms as topics ██████ enable TDPs to choose their breakout room	Details of each breakout room topic in the PPT
STORYTELLING				
1:00 – 1:15 15 minutes	Storytelling Introduction	- In your experience, what do good storytellers do for you? - Why storytelling? - The brain science: Stories activate a part of the brain that we normally don't use when hearing or seeing information - Storytelling helps to overcome 'how the audience thinks' barriers discussed earlier - Participants rate themselves on their storytelling comfort - If you can improve one thing about your storytelling capability, what would that be?	- Facilitator sets up poll and moderator runs it (multiple choice re comfort level: extremely, very, sort of, not at all) - Chat (participants submit answers)	

Day 2: STORYTELLING (Continued), CAREER STRATEGY and INFLUENCE

Time	Section	Description (What)	Methodology (How)	Required Assets
10:00 – 10:10 10 minutes	Welcome and Review of Day 1	- Facilitator welcomes participants back - Most important thing they learned yesterday	Chat and/or annotate and/or verbal answers	
STORYTELLING (Continued)				
10:10 – 10:30 20 minutes	Storytelling Practice	- In breakout rooms, in pairs, participants share their stories (3 min max each) and provide each other feedback - Reflection/Discussion: - What part of the story crafting process or story structure elements do you need to focus on?	- Breakout rooms (2 per room) - Participants annotate with a stamp to answer the reflection question	
2:55 – 3:00 5 minutes	Closing/Tomorrow	Tomorrow, we will continue exploring other things to consider when influencing	Moderator downloads Zoom analytics at the end of the day and sends to Giuliana to summarize	

RESILIENCE				
10:35 – 10:40 5 minutes	Resilience Introduction	- Resilience more important than ever (COVID) - Content sourced from SMEs, researchers, and practicing clinical psychologists - Step outside your comfort zone		
10:40 – 10:45 5 minutes	Current Stress/Pressure Level	Participants rate their current stress/pressure level	Participants add a stamp to an image of a thermometer	



ILT and eLearning Curriculum for Franchise Restaurant Operations

Building operational consistency, growth, and profitability



CLIENT

National quick-serve restaurant (QSR) franchise organization



AUDIENCE

Frontline restaurant staff, crew trainers, shift managers, general managers, and franchise owners/operators across all franchise locations



CHALLENGE

- **The Fragmentation:** Eliminate the wide variation in training across franchise locations that created inconsistent operations and declining Google reviews
- **The Learner Experience:** Transform the existing frontline eLearning that lacked clarity, engagement, and essential content, and contributed to inconsistent execution in the restaurants
- **The Capability Gap:** Close the gaps in business and operational knowledge among franchisees and Franchise Business Consultants (FBCs) to enable more effective coaching and improved profitability
- **The Growth Pressure:** Support the CEO's aggressive expansion and unit sales growth mandate while maintaining training execution quality and consistency



SOLUTION

I led a full redesign of frontline learning by rebuilding 12 foundational Articulate Rise eLearning courses and building three new ones to address critical content gaps.

I designed and built 3 role-specific curriculums for senior restaurant staff (crew trainers, shift managers, and general managers) including 18 eLearning courses, 2 on-site ILT programs, 3 trainer guides, and several evaluations.

For struggling franchisees, I created a 3-day ILT program focused on strengthening business acumen and operational decision-making. To ensure broader access, I built a 6-course eLearning curriculum for franchisees unable to attend in person.

I created a 1-year FBC Learner Journey, enabling FBCs to more effectively coach struggling locations and sustain performance improvements in the field.



RESULTS

- Over the 4-year partnership, the franchise expanded from 640 to 850 locations, a 33% growth
- The client's Senior Director of Training highlighted the ILT program as a benchmark for future training design and delivery
- Training completion rates improved which led to higher consistency in operational execution within and across locations
- Average per-location gross sales increased by 5%, reflecting improved operational execution and overall franchise performance



ASSETS CREATED

- Design documents for eLearning and ILT curriculums
- Executive overviews of each curriculum
- Articulate Rise eLearning courses
- PowerPoints for 3-day franchisee ILT course
- Participant Journal and Handouts for 3-day franchisee ILT course
- Trainer Guides for each ILT course
- FBC Learner Journey plan

Samples of the Frontline eLearning Courses



Lesson 3 of 15

Bacon and Bacon Bits Prep

Can you smell it? Yup, that's bacon!
Watch the videos below to learn
how to prepare bacon and bacon
bits.



Lesson 6 of 15

Cheese Prep

Let's kick off Cheese Prep with a
cheesy joke. Click the card below to
see the answer.

Why did the cheese go to the
gym?

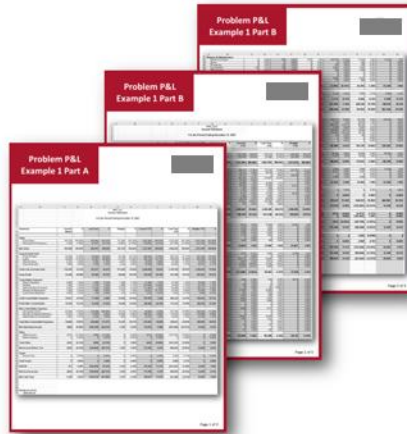
To get SHREDDED



Samples of the 3-Day Franchisee ILT PowerPoint

UNDERSTANDING THE NUMBERS WHAT STORY DO THEY TELL?

- Sample P&L
- Work in pairs to answer these questions:
 - What's the problem?
 - What are the potential causes?
 - What should be done to solve it?
- The P&L includes the summary and detailed income statements



The image shows three overlapping sample Profit and Loss (P&L) statements. The topmost statement is labeled 'Problem P&L Example 1 Part A'. Below it are 'Problem P&L Example 1 Part B' and 'Problem P&L Example 1 Part C'. Each statement is a detailed financial table with multiple columns and rows, representing different financial metrics over time.



UNDERSTANDING THE NUMBERS WHAT STORY DO THEY TELL? EXAMPLE 1

What's the problem?

- OT Crew Labor is high

What are the potential causes?

- Paying 1.5x the amount your team should be earning per hour



The image shows three overlapping sample Profit and Loss (P&L) statements. The topmost statement is labeled 'Problem P&L Example 1 Part A'. Below it are 'Problem P&L Example 1 Part B' and 'Problem P&L Example 1 Part C'. Each statement is a detailed financial table with multiple columns and rows, representing different financial metrics over time.

What should be done to solve it?

- Schedule your team appropriately and according to sales projections
- Build in a few hours of buffer for key employees such as shift managers when doing the weekly schedule
- Spend time projecting your sales to take into account sales growth, holidays and the like
- Have an always hiring mindset, be on the lookout for great employees even when you are fully staffed
- Take care of your team to prevent sudden turnover



NOTE: The Facilitator SAY/DO instructions are included in the notes of the PowerPoint.

NOTE: The icons inside the grey bars indicate to the participants (and facilitator) when to expect an activity, discussion, or practice, and provides the participant guide page number when applicable.

COST/BENEFIT OF LABOR

Cost

When you need another employee for your lunch rush...



$$3 \text{ hours of lunch rush} \times \$16 / \text{hour wage} = \$48$$

Revenue

1 extra employee allows you to service 8 more guests per hour...



$$8 \text{ guests} \times \$14.50 \text{ average check} \times 3 \text{ hours of lunch rush} = \$348$$

That's only a **14% investment!** (\$48 Cost divided by \$348 Revenue)

You make more than 7 times what you invested in labor!

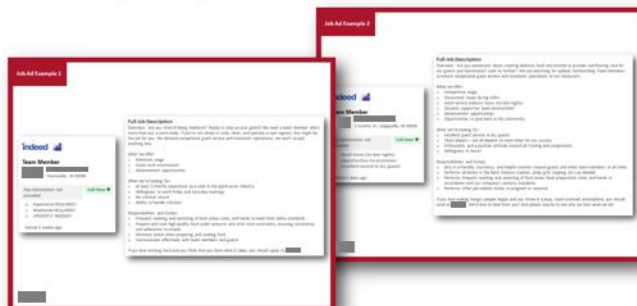
Let's practice troubleshooting.

- **Actual** food cost reports and **variance** food cost reports
- Work in **pairs** to see what you **notice**



JOB AD COMPARISONS

- Is it an effective job ad? Why or why not?
- How would you improve it?



CALCULATE YOUR TURNOVER

Calculations

- **Turnover %** = Number of Employees Who Left ÷ Average Number of Employees x 100
- **Average # of Employees** = (employees at the beginning of given period + employees at the end of given period) ÷ 2

Example

- Start of year: ?? employees
- End of year: ?? employees
- Average # of Employees = ??
- Employees who left: ??
- Turnover rate = ??%

National average turnover rate for the QSR industry:
144%

39



50% of all turnover in entry-level work occurs within the **FIRST 30 DAYS**.

Did you **impress** them during the recruiting, interviewing, hiring, and onboarding and then **stop trying**?



42

CULTURE & ENVIRONMENT ASSESSMENT

Culture and Environment										
ASSESSMENT										
For each of the elements below, circle a rating.										
PAY:	1	2	3	4	5	6	7	8	9	10
Lowest pay										Best pay
WORK:	1	2	3	4	5	6	7	8	9	10
Bad work										Great work
TRAINING:	1	2	3	4	5	6	7	8	9	10
No / ineffective training										Lots of effective training
COMMUNICATION:	1	2	3	4	5	6	7	8	9	10
Very little communication										Lots of communication
FEEDBACK & COACHING:	1	2	3	4	5	6	7	8	9	10
No feedback or coaching										Effective feedback & coaching
RECOGNITION:	1	2	3	4	5	6	7	8	9	10
No recognition										Lots of recognition
FLEXIBILITY:	1	2	3	4	5	6	7	8	9	10
No flexibility										Lots of flexibility
TEAMWORK:	1	2	3	4	5	6	7	8	9	10
Team conflict										Great teamwork

- Fill it out honestly yourself
- Have your team members fill it out
- Compare the answers

33



Samples of the 3-Day Franchise ILT Handouts

Job Ad Example 1



Team Member

Doomsville, XX 99999

Pay information not provided

Full-time ♥

- Experience REQUIRED!
- Weekends REQUIRED!
- URGENTLY NEEDED!

Active 3 weeks ago

Full Job Description

Overview: Are you tired of being mediocre? Ready to step up your game? We need a team member who's more than just a warm body. If you're not afraid to cook, clean, and operate a cash register, this might be the job for you. We demand exceptional guest service and consistent operations; we won't accept anything less.

What we offer:

- Minimum wage
- Great work environment
- Advancement opportunities

What we're looking for:

- At least 3 months experience as a cook in the quick-serve industry
- Willingness to work Friday and Saturday evenings
- No criminal record
- Ability to handle criticism

Responsibilities and Duties:

- Frequent washing and sanitizing of food areas, tools, and hands to meet food safety standards
- Prepare and cook high-quality food under pressure and strict time constraints, ensuring consistency and adherence to recipes
- Minimize waste when preparing and cooking food
- Communicate effectively with team members and guests

If you love working hard and you think that you have what it takes, you should apply to [REDACTED]

Job Ad Example 2



Team Member

1 Yummy Dr., Happyville, XX 99999

Pay information not provided

Full-time ♥

- Good hours (no late nights)
- Opportunities for promotion
- Excellent service to ALL guests

Active 2 days ago

Full Job Description

Overview: Are you passionate about creating delicious food and excited to provide overflowing care for our guests and teammates? Look no further! We are searching for upbeat, hardworking Team Members to ensure exceptional guest service and consistent operations of our restaurant.

What we offer:

- Competitive wage
- Discounted meals during shifts
- Good service industry hours (no late nights)
- Dynamic supportive team environment
- Advancement opportunities
- Opportunities to give back to the community

What we're looking for:

- Excellent guest service to ALL guests
- Team players – we all depend on each other for our success
- Enthusiastic and a positive attitude toward all training and assignments
- Willingness to learn!

Responsibilities and Duties:

- Acts in a friendly, courteous, and helpful manner toward guests and other team members at all times
- Performs all duties in the Basic Stations (cashier, prep, grill, topping, etc.) as needed
- Performs frequent washing and sanitizing of food areas, food preparation tools, and hands in accordance with our company's sanitary standards
- Performs other job-related duties as assigned or required

If you love making hungry people happy and you thrive in a busy, team-oriented atmosphere, you should work at [REDACTED]. We'd love to hear from you! And please stop by to see why we love what we do!

Samples of the FBC Learner Journey Plan

FBC Learner Journey	2023 Overview											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Teaser email												
Monthly FBC Call												
Self-evaluation												
Feedback from Ops Directors												
Quiz												
FBC Commitments and Action Plans												
Weekly Action Alerts												
Virtual Follow-up Meeting												
1-day In-Person Meeting: Foundational Topic												
Virtual ½-day Meeting: Foundational Topic												
	Legend Touchpoint Sustainment Activity Foundational Topic											

FBC Learner Journey	Q1 Details	
January Teaser email and video to FBCs about upcoming FBC leadership training Monthly FBC Call: Purpose of FBC leadership training (invest in their development) + Learner Journey overview FBC Self-evaluation survey (FBCs evaluate themselves on the skills required to master the foundational topics)	February Monthly FBC Call: Aggregate results of FBC Self-evaluation Quiz about upcoming March foundational topic (Leading Through Influence) to gain insight on knowledge gaps: Points for correct answers. Prize awarded in December.	March Teaser email to FBCs about the March in-person meeting Monthly FBC Call: Explain pre-work required for March in-person meeting 1-Day In-person meeting: Foundational Topic – Leading Through Influence FBC Commitments and Action Plans for Q2 based on foundational topic they learned in March Quiz about March foundational topic: Points for correct answers. Prize awarded in December.

FBC Learner Journey	Q4 Details		
	October Weekly Action Alerts: FBCs receive a weekly email/text with a very specific action to do that week (based on the foundational topic they learned in September) Monthly FBC Call: Discuss outcomes of most recent weekly action alerts Quiz about September foundational topic: Points for correct answers. Prize awarded in December. Virtual Follow-up FBC Meeting: Share best practices, challenges, and what ifs regarding the September foundational topic.	November Weekly Action Alerts: FBCs receive a weekly email/text with a very specific action to do that week (based on the foundational topics they learned in March, April, May, July or September) Monthly FBC Call: Instruct FBCs to do the Self-re-evaluation FBC Self-evaluation survey (FBCs re-evaluate themselves on the skills required to master the foundational topics) Gather feedback from Ops Directors on FBC performance Quiz about March, April, May, July, and September foundational topics: Points for correct answers. Prize awarded in December. Virtual Follow-up FBC Meeting: Share best practices, challenges, and what ifs regarding the March, April, May, and July foundational topics.	December Weekly Action Alerts: FBCs receive a weekly email/text with a very specific action to do that week (based on the foundational topics they learned in March, April, May, July or September) Monthly FBC Call: Aggregate results of FBC Self-evaluation compared to January's results. Share success stories. Award prizes to FBC with most points from quizzes. Next Steps for 2024 FBC leadership development (objectives and learning journey plan)



Interactive Ethics and Compliance Learning Experience for Client-Facing Staff

Turning integrity into decision-driven learning



CLIENT

Big 4 accounting and professional services firm



AUDIENCE

Newly hired client-facing professionals across the organization



CHALLENGE

- **The Mandate:** Create a clever, highly interactive approach to ethics and compliance to replace ineffective, forgettable training for client-facing professionals
- **The Trust Gap:** Establish credibility for an innovative nontraditional design approach within a professional, conservative, and risk-averse environment with exceptionally high standards
- **The Stakes:** Guarantee that learners understand, retain, and consistently apply critical rules and behaviors in real-world situations where errors could result in severe financial, legal, and reputational consequences



SOLUTION

I designed a highly interactive, scenario-based video learning experience. Each topic was structured like a Netflix-style series, beginning with a narrator who introduced the purpose for the learner before guiding them into a sequence of interconnected episodes.

Each series contained 5–7 episodes, with each episode presenting a realistic workplace situation that naturally flowed into the next, creating a continuous storyline. Within each episode, learners engaged with unfolding scenarios involving client-facing professionals, and at key decision points, a narrator introduced “what if” questions that prompted learners to make ethical and compliant choices.

To further increase engagement and memorability, I designed scripted “commercials” based on familiar consumer-style messaging to add humor and variety. I also created rhyming “jingles” to reinforce key compliance concepts in a format learners would recall more easily.



RESULTS

- Earned high praise from subject matter experts and key stakeholders
- Storyboards were adopted by the client for full video production
- Transformed compliance training from passive and forgettable to compelling and actionable



ASSETS CREATED

- Storyboards for 5 series, each including 5-7 episodes
- Scripts for videos
- Scripts for commercials
- Scripts for jingles

Samples of the Storyboards: Series 4, Episode 2, and a Commercial

Series 4: Build Trust in How We Do Business

SERIES DETAILS	
Overview	The learner follows a day in the life of Matt to understand how we do business at █ to build trust.
Length	Approx 28 minutes / 6 Episodes
Objectives	1. Describe the importance of █ commitment to conducting business with integrity to build trust for our people, clients, communities and business. 2. Recognize that at █ we know speaking up can be difficult and there are multiple ways for you to speak up and report concerns without fear of retaliation. 3. Explain where to find the tools and resources available to help when you have questions or concerns.
Topics Covered	The following topics will be covered throughout this entire series: • Know your client • Charge your time and expenses accurately • Gifts and entertainment • Compete fairly • We never falsify or alter documents • Know the resources available to you
Narrator	 Name: Leslie Background: HR rep/trainer
Cast of Characters	1. Matt (m) - Associate 2. Kelsey (f) - Manager 3. Professor Perez (m) - Matt's old college professor 4. Ravi (m) - Matt's friend and Associate at competing firm
Table of Contents	• Series outline of episodes • Episode 1: How we do business - Matt's story • Episode 2: Matt starts his day • Episode 3: Matt flies to a client location • Episode 4: Matt goes to an engagement party • Episode 5: Matt goes to a hockey game • Episode 6: Matt flops on the couch • Commercial: Are you feeling pressure?

Series 4: Build Trust in How We Do Business

EPISODE 2: Matt starts his day

EPISODE DETAILS	
Modality	Video (1-2 min) / Interactive Video (1-2 min) / Video (1-2 min)
Total Time	6 minutes
Overview	• The narrator introduces the topic of "Know your client" and quickly explains why we need to know who we are doing business with at all times and how to conduct the appropriate due diligence • Then the narrator sets up the scene of Matt eating his breakfast while getting shocking messages about one of his clients, to explore what to do if the learner discovers something <u>during</u> the engagement • Video with Q&A: Learner picks which message source they trust more than the others • Narrator explains that it doesn't matter which source you trust or don't trust, these are red flags, so you need to speak up and report your concerns • The narrator explains how the learner should speak up and report their concerns and the resources available to the learner to do so • Jingle plays: Don't go it alone. Just pick up the phone or send us an email. We're here to assist, and we will persist, until we resolve every detail. 
Objectives	1. Discuss how to conduct the appropriate due diligence to build trust 2. Recognize why we need to know who we are doing business with at all times, remain vigilant throughout the engagement or business relationship and speak up and report our concerns
Key Learning Points	• How to conduct the appropriate due diligence • Speak up and report your concerns • Why we need to know who we are doing business with at all times
Characters & Scenarios	1. Matt (m) - Associate a. Eating breakfast while watching 24-hour business channel, glancing at his Twitter feed, and getting a text from his friend 2. 24-hour business channel a. Client might be convicted of a financial crime and money laundering 3. Twitter a. Client involved in financing terrorists 4. Text message a. A friend who works at the client sends a text: OMG! Did you hear? I guess I now work for a corrupt company that uses bribery!
Details	• The narrator introduces the topic of "Know your client" and quickly explains the "Why do we need to know who we are doing business with at all times" and "How to conduct the appropriate due diligence" bullets below: ◦ We must always perform the appropriate due diligence on prospective clients so we can understand their identity and assess any potential risks they may present to the firm <u>before</u> we engage in business with them ◦ This allows us to check if the client has been involved in any criminal activities (e.g., money laundering, bribery, corruption) or if they are located in a country where we are prohibited or restricted from doing business ◦ The firm has specific processes in place that allow us to understand the identity our clients and assess any potential risks they present to us

Series 4: Build Trust in How We Do Business

EPISODE DETAILS

- Follow the firm's client acceptance and engagement acceptance/continuance processes before signing the engagement letter and starting work with new clients
 - Re-initiate the client acceptance process if you become aware of changes to current clients (e.g., change of ownership)
- Then the narrator sets up the scene of Matt eating his breakfast while getting shocking messages about one of his clients, to explore what to do if the learner discovers something during the engagement
- Then the narrator says "But what if you discover something that concerns you during the engagement? Let's check in with Matt who's eating his breakfast while watching his usual 24-hour business channel, glancing at his Twitter feed, and getting a text from his friend...they all mention something shocking about one of his clients:"
 - News channel says: Client might be convicted of a financial crime and money laundering
 - Twitter says: Client involved in financing terrorists
 - A friend who works at the client sends a text: OMG! Did you hear? I guess I now work for a corrupt company that uses bribery!
- Video with Q&A: Learner picks which source they trust more than the others
- Narrator explains that it doesn't matter which source you trust or don't trust, these are red flags, so you need to speak up and report your concerns. Remain vigilant throughout the engagement or business relationship and report red flags that may indicate potential money laundering, terrorist financing, or other criminal activity. There are examples of "Red flags" in our money laundering policy that people should keep an eye out for.
- The narrator explains how the learner should speak up and report their concerns and the resources available to the learner to do so:
 - To report a concern or if you're aware of conduct by anyone — including those at any level — that may be unethical, illegal, or inconsistent with [redacted] Code of Conduct, Our Standards, values, or policies — help is available
 - Talk to your supervisor, coach, engagement leader, partner leader, Relationship Leader, Connectivity Partner, Primary Reporting Partner (PRP), Partner Affairs, or People Team (HR) representative
 - You can also report your concerns to the Ethics HelpLine, anonymously if you prefer
 - Visit the Ethics & Compliance site for more information
- Jingle plays: Don't go it alone. Just pick up the phone or send us an email. We're here to assist, and we will persist, until we resolve every detail.

Link to Script

Series 4: Build Trust in How We Do Business

COMMERCIAL: FEELING PRESSURE?

EPISODE DETAILS

Modality	Video (embedded in Episode 3 video)
Total Time	10-15 Seconds
Purpose	To reinforce key content and re-engage learner's attention
Objectives	1. Recognize that our time and expenses should be recorded accurately and in a timely manner 2. Summarize that we should feel comfortable charging all of our time
Overview	Episode video will be interrupted with this clip. The word "Ad" in a yellow box is overlaid in the top right corner with a countdown timer.  Overview of the ad: - Someone is rubbing their head and feeling under pressure - Spokesperson says: - Are you feeling pressure? - We've got the remedy for you! - No-trim (play on Motrin) relieves the pressure to inaccurately record time and expenses 
Link to Script	



eLearning and VILT Courses for Leadership Competencies Launch

Transforming abstract behaviors into meaningful career development wisdom



CLIENT

Leading national pizza delivery franchise organization



AUDIENCE

All corporate headquarters employees



CHALLENGE

- **The Mandate:** Create engaging learning that builds awareness and understanding of the organization's newly redesigned leadership competency model across 3 career levels
- **The Complexity:** Explain abstract competency concepts in a fun, memorable way that learners can easily appreciate and apply in their day-to-day work
- **The Timeline:** Deliver 4 learning modules in just 2 weeks to support the organization's leadership competency launch without compromising quality



SOLUTION

To establish a common foundation, I developed a 90-minute VILT course for all employees that explained the purpose of the competencies, why they mattered, and how they supported career development.

I designed and developed 3 role-specific Articulate Rise eLearning modules for individual contributors, mid-level leaders, and senior-level leaders. Each module translated the competency framework into practical, role-specific expectations through engaging visuals, audio narration, and realistic scenarios that helped learners to both identify and determine the appropriate competencies in different situations.

To reinforce learning beyond the courses, I proposed and developed a Leader Discussion Guide to equip leaders with conversation prompts to help their teams understand, discuss, and demonstrate the competencies in their day-to-day work.



RESULTS

- Delivered all VILT and SCORM-ready eLearning modules ahead of the competency launch
- Successfully rolled out the VILT program across the organization, earning high participant ratings and 100% correct assessment scores
- Leaders appreciated the discussion guide to reinforce competencies through ongoing team conversations
- Received positive client feedback on the clarity, engagement, and effectiveness



ASSETS CREATED

- Outlines for the VILT and eLearning courses
- PowerPoint with facilitator notes for the VILT course
- Articulate Rise eLearning courses
- Leader Discussion Guide for Core Competencies

VILT Course Agenda

Program Name: [REDACTED] Core Competencies: The What, Why, and How (Virtual Instructor Led Training)

Learning Objectives

- Be able to describe what a competency is and what it is used for
- Be able to state the 5 Core Competencies and why they are important to [REDACTED]
- Be able to summarize the definitions of the 5 Core Competencies
- Be able to explain ways in which [REDACTED] competencies will be used in Career Development

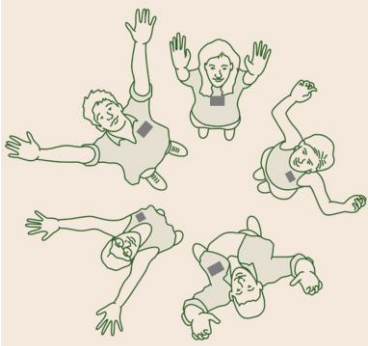
Recommended Agenda

Time	Section	Description	Method in Microsoft Teams
2 min.	Ice Breaker	If you could learn one new skill, no matter how outrageous, what would it be?	Meeting chat
3 min.	Welcome	CEO Intro video	Share Video (2 min, 10 seconds) CoreCompetencies_Intro_V2.mp4
1 min.	Introduction	Agenda	Share PPT
		Learning Objectives	Share PPT
5 min.	Competency Definition	Rating: "I know exactly what's expected of me on the job at [REDACTED]." (2 min)	Rating Poll (scale: 1-10)
		What are some words that come to mind when you hear the word "competency"? (2 min)	Meeting chat (or verbal if less than 20 people)
		General definition of competency (1 min)	Share PPT
62 min.	[REDACTED] 5 Core Competencies	Why are competencies important for [REDACTED]? (10 min: 1 min to explain/send, 7 min in BO room, 2 min to share)	Breakout Room discussion (auto-generated: 4-5 people per breakout room; 7 minutes)
		Why are competencies important to each team member? (WIIFM) (5 min: 1 min to ask/explain; 1-2 min to get answers; 2 min to explain)	Meeting chat (or verbal if less than 20 people)
		[REDACTED] 5 Core Competencies 1. Customer focused 2. Result Driven 3. Innovative Mindset 4. Strategic Thought Leadership 5. Collaboration (1 min)	Share PPT of corresponding memorable image each with a competency
		CEO Competencies Video	Share video (2 minutes, 35 seconds) FiveCompetencies_V2.mp4

		True or False: The Core Competencies apply to every level and position at [REDACTED] (3 min: 1 min to explain; 1 min to get and respond to reactions; 1 min to explain)	Reactions: Select "love"  reaction if you think it's true. Select "surprise"  reaction if you think it's false.
		Definitions of each core competency. After each definition, participants share the first person to come to mind after hearing/reading the definition. (9 min: 1 min to explain activity; 5 min to explain each core competency – 1 min each; 3 min for activity – 30 seconds per competency)	Share PPT Meeting chat (or verbal if less than 20 people)
		Scenarios to show what the Core Competencies look like in action. (11 min: 2 min to explain/send, 5 min in BO room, 4 min to share) Scenario 1: <u>Situation:</u> Emma determined the root cause of the [REDACTED] low quarterly sales numbers in one of the regions. So, she revised the marketing plan and worked with her manager to implement it. <u>Question:</u> Which specific competencies did Emma demonstrate in this scenario? How would it have gone if she didn't? <u>Answers:</u> • Innovative Mindset (Analyzing and evaluating data; implementing innovative ideas) • Strategic Thought Leadership (Working toward common goals to meet strategic priorities) Scenario 2: <u>Situation:</u> Oliver is working on an exciting project to promote the [REDACTED] brand. He's overwhelmed. He got an email that the team is waiting on something but he thought it was someone else's responsibility. <u>Question:</u> Which specific competencies should Oliver be demonstrating in this scenario? How would the situation improve? <u>Answers:</u> • Results Driven (Holding yourself accountable; Organizing time, energy, resources and space) • Collaboration (Communication; Sharing ideas and responsibilities)	Send text of both situations in meeting chat before sending participants to breakout rooms. Assign one scenario to each breakout room. Breakout Room discussion (auto-generated: 4-5 people per breakout room; 5 minutes)
		Full competency model with concentration areas and how it breaks out to behaviors for the different levels. (5 min)	Share PPT

		How do the Core Competencies support the [redacted] purpose, values, and growth strategy? (8 min: 1 min to explain/send, 5 min in BO room, 2 min to share)	Breakout Room discussion (3 breakout rooms: one for purpose, one for values, and one for growth strategy; 4-5 people per breakout room; if more than 15 participants, create additional breakout rooms for each topic. 5 minutes)
		Rating: "I have a clear picture of my career aspirations at [redacted]." (2 min)	Rating Poll (scale: 1-10)
		How will the Core Competencies be used in Career Development? (Career Roadmap explanation) (5 min)	Share PPT
8 min.	Action/Reflection	Participants share ONE word that would summarize their thoughts about what they have learned about Core Competencies. (1 min)	Meeting chat (or verbal if less than 20 people)
		Which Core Competency do you think you need to work on? Why? What will you do specifically? (7 min: 1 min to explain/send, 5 min in BO room, 1 min for facilitator to wrap up)	Breakout Room discussion (auto-generated: 3-4 people per breakout room; 5 minutes)
7 min.	Summary/Test	What is a competency and what is it used for? (1 min)	Meeting chat (or verbal if less than 20 people) to fill in the missing word
		What are the 5 Core Competencies? (1 min)	Meeting chat (or verbal if less than 20 people) to state the competency when presented with the corresponding image.
		Summarize the definitions of the 5 Core Competencies (2 min)	Meeting chat (or verbal if less than 20 people) to state the competency that matches the definition.
		How will [redacted] competencies be used in Career Development? (2 min)	Share PPT of Career Roadmap. Meeting chat (or verbal if less than 20 people) to identify the 4 key questions.
		Link to Slice page with competencies (1 min)	Share PPT Send Slice page link in chat: https://slice[redacted].com/better-careers-at-[redacted]
1 min.	Next Steps	Equal onus on team member and leader to initiate a rich discussion about what you have learned Complete one of the modules based on where your current role fits in the Career Development Model. Optionally, you can take any other module if you are interested in the competencies at those Career Development Model levels: • [redacted] Core Competencies: Leading Self • [redacted] Core Competencies: Leading Teams • [redacted] Core Competencies: Leading Functions	Share PPT
		Career Development & Competency Model by Job Level	Share PPT
1 min.	Closing	Motivational quote about competency: "Excellence is not a singular act, but a habit. You are what you repeatedly do" — Shaquille O'Neal	Share PPT
		Thank you!	Stop sharing PPT
90 min	TOTAL TIME		

Samples of the VILT PowerPoint



**IF YOU COULD LEARN ONE
NEW SKILL
NO MATTER HOW
OUTRAGEOUS
WHAT WOULD IT BE?**

NOTE: The Facilitator notes are included in the notes of the PowerPoint.



AGENDA

- Learning Objectives
- Competency Definition
- [REDACTED] 5 Core Competencies
- Summary/Test
- Next Steps



Learning Objectives

- Be able to describe what a competency is and what it is used for
- Be able to state the 5 Core Competencies and why they are important to [REDACTED]
- Be able to summarize the definitions of the 5 Core Competencies
- Be able to explain ways in which [REDACTED] competencies will be used in Career Development



RATING:

**I KNOW EXACTLY WHAT'S
EXPECTED OF ME ON THE
JOB AT [REDACTED]**

1 = NOT AT ALL
10 = ABSOLUTELY

 **TRUE**
 **OR**
FALSE?

**THE CORE COMPETENCIES
APPLY TO
EVERY LEVEL AND
POSITION
AT**

**WHAT DO OUR COMPETENCIES
LOOK LIKE IN
ACTION?**

Scenario 1

Situation

Emma determined the root cause of the low quarterly sales numbers in one of the regions. So, she revised the marketing plan and worked with her manager to implement it.

Question

Which specific competencies did Emma demonstrate in this scenario? How would it have gone if she didn't?



Scenario 2

Situation

Oliver is working on an exciting project to promote the brand. He's overwhelmed. He got an email that the team is waiting on something, but he thought it was someone else's responsibility.

Question

Which specific competencies should Oliver be demonstrating in this scenario? How would the situation improve?



**DISCUSS YOUR ASSIGNED
SCENARIO**

**YOU HAVE 5 MINUTES IN YOUR
BREAKOUT ROOM**

**SELECT A SPOKESPERSON TO
SHARE WHEN WE RETURN TO
THE MAIN ROOM**

Leader Discussion Guide for Core Competencies

Leader Discussion Guide for Core Competencies

Welcome and thank you for leading rich discussions with your team members on our Core Competencies! The purpose of this Leader Discussion Guide is to help you, as a leader at [redacted], create conversations about, bring to life, and help others understand, appreciate, and demonstrate the [redacted] Core Competencies.

After you and your team members have completed both Module 1 ([redacted] *Core Competencies: The What, Why, and How*) and Module 2 or 3 or 4, there's an equal onus on the team member and you, their leader, to have a rich discussion about the [redacted] Core Competencies.

Remember, the Core Competencies apply to all [redacted] team members, irrespective of their job grade and function. Subskills are the same for each level but the definition of each subskill is different for each level.

Where can you find the sub competencies for your team members? Here's the answer:

- If you did Module 3 ([redacted] *Core Competencies: Leading Teams*), the competencies for your team members is in Module 2 ([redacted] *Core Competencies: Leading Self*)
- If you did Module 4 ([redacted] *Core Competencies: Leading Functions*), the competencies for your team members is in both Module 2 ([redacted] *Core Competencies: Leading Self*) and Module 3 ([redacted] *Core Competencies: Leading Teams*)

Tips for the Discussions:

- Commit to mutual benefit
- Consistently model the Core Competencies
- Connect the Core Competencies to the [redacted] purpose, values, and growth strategy
- Be open to and ask for feedback on how the discussion went
- Have fun!

The Discussion Questions below are designed to be flexible. Choose the questions that work best for you, the situation, and the team member. You might have other questions that you want to add to the list. Choose the order of your questions and choose the number of questions you want to ask. Many of the discussion questions can be repeated several times using different Core Competencies.

Enjoy your discussions!

Discussion Questions

1. Why do you think the Core Competencies apply to all [redacted] team members, irrespective of their job grade and function?
2. Which Core Competency speaks to you the most? Why?
3. Which Core Competency do you think I, as your leader, need to work on? Why?
4. Which Core Competency do you think you need to work on? Why?
5. Which Core Competency do you think our/your team needs to work on? Why? How can I help?
6. Why do you think we have a Value of Innovate to Win and a Competency of Innovative Mindset? What is the difference? Do we need both?
7. Tell me about a time that you have demonstrated one of the Core Competencies recently and what impact it had.
8. Where might *[insert Core Competency]* be necessary in your day-to-day work or an upcoming project?
9. What situations would *[insert Core Competency]* be easy for you to demonstrate? Why?
10. What situations would *[insert Core Competency]* be challenging for you to demonstrate? Why?
11. Who on the team do you think does a great job of demonstrating *[insert Core Competency]*? Can you give me a specific example?
12. What examples can you share where you have seen *[insert Core Competency]* demonstrated? What was the situation, who was involved, what was the impact?
13. What examples can you share where one of our Core Competencies should have been demonstrated, but was not? What was the situation, who was involved, what was the impact?
14. What opportunities do you see, in the very near future, to demonstrate our Core Competencies?
15. How can I help you in your journey of demonstrating our Core Competencies?
16. Are any of our Core Competencies relevant for your interactions outside of work, with family, friends, other endeavors? What was the situation, who was involved, what was the impact?
17. Do you have any questions that you want to ask me about our Core Competencies?

Some of My Repeat Clients

Airline:

- Air Canada
- United Airlines

Construction/Power:

- County Materials
- Eaton Power

Consulting:

- PwC
- EY

Fast Food:

- Chick-fil-A
- Papa John's
- YUM Brands (Pizza Hut)
- Tim Hortons

Financial Services/Banking:

- Capital One
- HSBC
- BMO Harris Bank

Health Care:

- Odyssey

Insurance:

- State Farm
- MetLife

Military:

- Lockheed Martin
- Raytheon
- Northrop Grumman

Pharmaceutical:

- Biogen
- Genentech
- Alexion

Retail:

- JCPenney
- Michael Kors

Technology:

- Microsoft
- Texas Instruments

Telecom:

- O2 (Britain)