



Active Strategy

UNIVERSITY

An Overview of ActiveStrategy Business Consulting, Training, and Technical Services



Software and Consulting Solutions for Enterprise Strategy Execution

About Enterprise Strategy Execution

ActiveStrategy provides the often missing link between the formulation of strategy and real world execution by providing a custom tailored **combination of strategic business consulting, training, technical services, and best-in-class software** designed explicitly for Enterprise Strategy Execution.

Our Expertise

At ActiveStrategy we are practitioners of Enterprise Strategy Execution with hands-on experience developing & deploying strategic management and performance excellence frameworks including Balanced Scorecards, dashboards, Baldrige criteria, Six Sigma, and more.

ActiveStrategy has applied these business-redefining techniques to many of the world's most successful organizations, helping them achieve superior results. Over the years our team has helped clients win three Malcolm Baldrige National Quality Awards, two Deming prizes, and six Florida Sterling Awards.

We've harnessed this expertise to develop the most practical and immediately applicable Business Consulting, Training, and Technical Services available – as well as the preeminent web-based software system for Enterprise Strategy Execution.

How We Can Help You

We understand how to get you through the tough work of distilling and communicating strategic objectives.

We can help you establish the right structures, Scorecards, and frameworks, identify key performance measures and, most importantly, show you how to apply them within your organizational culture to drive your most important outcomes.

Whether your organization is new to what we call the “Strategy Execution Evolution” or has even achieved national recognition for your efforts, we can help you progress faster, drive methodologies and adoption deeper, and execute strategy more successfully.

About this Guide

This guide provides an overview of the most often delivered Business Consulting, Training, and Technical Services, along with a recommended number of days for each. Services may be scaled up or down as needed. Please inquire about additional topics or services.

The educational courses described in this guide may be delivered at your facility or at ActiveStrategy University locations in Philadelphia and San Francisco. See upcoming scheduled courses at www.activestrategy.com/ASuniversity.

For more information, contact your ActiveStrategy Account Consultant.

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SECTION I

*Business Consulting
& Training Courses*

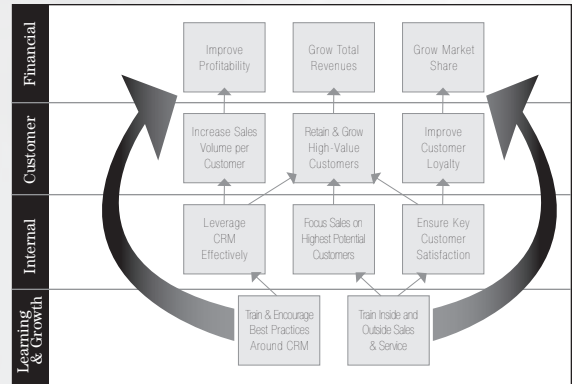
Strategic Planning Facilitation

On-Site Guidance and Coaching of Executive Teams for More Effective, Productive Strategic Planning Sessions

For many organizations, strategic planning is the first step in their strategy execution evolution. For organizations with a longer track record employing strategy execution methodologies, strategic planning helps refine an existing Balanced Scorecard framework, strategic objectives, and key measurements. ActiveStrategy views the proper management and structuring of strategic planning as critical to effective strategy execution and performance excellence.

Available services may include facilitation of single strategic planning meetings as well as management of the complete strategic planning process.

ActiveStrategy Executive Consultants are especially sensitive to politics, egos, and the subtleties of group dynamics, allowing them to skillfully guide often large groups of senior executives through strategic planning sessions, ultimately resulting in actionable outputs that include: a clear set of strategic objectives, key high-level measures, and aligned initiatives, all of which reflect the direction of the organization.



Since ActiveStrategy Consultants have worked across so many diverse clients and industries, it is often possible to match up vertical industry expertise with specific clients.

Recommended Attendees:

Executive Team

Pre-work for Attendees:

SWOT Analysis, focusing on individual attendee's area of responsibility.

Duration: Facilitated strategic planning meetings typically range from 1/2 day to 2 full days, depending on the organization's planning process. Direct management of the strategic planning process will be estimated on a per-case basis. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required.

Strategic Planning Facilitation Topics:

- 1 Customer Value Discipline discussion, selection, and/or reaffirmation
- 2 Assessment and refinement of Vision statement, if necessary
- 3 "Stealth Competitor" analysis
- 4 Evaluation of customer needs and ability to meet them compared to competition
- 5 Market and risk analysis
- 6 Performance gap analysis
- 7 SWOT Analysis based on input from the above, as well as departmental SWOT Analyses conducted by attendees
- 8 Strategy mapping

Balanced Scorecard Development Workshop

Facilitated Working Session to Develop a Top-Level Balanced Scorecard

The Balanced Scorecard Development Workshop is a structured, facilitated process that quickly and effectively guides a management team through the creation of a top-level Balanced Scorecard (which could be for a corporation, business unit, functional area, or service line). This top-level Scorecard articulates the strategic plan in operational and measurable terms. It is also the critical starting point from which lower level, aligned Scorecards will be cascaded.

Workshops focus on selecting the Scorecard perspectives, identifying the critical few strategic objectives, uncovering the key outcome measures, and aligning and prioritizing the major initiatives. In order to identify the best possible strategic objectives, a SWOT analysis is typically completed during the workshop. If it has not already been done, the group also works toward a consensus agreement on the high-level strategic plan and the creation of a working strategy map. At the conclusion of the workshop, a complete Scorecard will be drafted, after which the appropriate measure data may be collected and measure goals may be set.



The screenshot displays a software interface for developing a Balanced Scorecard. It shows a tree structure of perspectives and objectives. The 'Financial' perspective includes objectives like 'Increase Profitability of Core Products' and 'Increase Sales of Core Products'. The 'Customer' perspective includes 'Increase Customer Satisfaction' and 'Increase Customer Retention'. The 'Internal' perspective includes 'Improve Core Capabilities' and 'Reduce Core Costs'. The 'Learning and Growth' perspective includes 'Increase Employee Skills' and 'Increase Employee Retention'. Each objective is associated with specific measures and target values.

Recommended Attendees:
Top-level executives and key senior executives

Pre-work for Attendees:
SWOT Analysis, focusing on individual attendee's area of responsibility.

Duration: Balanced Scorecard Development Workshops typically require one full day per Scorecard. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required.

Balanced Scorecard Development Workshop Topics:

- 1 Discussion of corporate goals and strategies
- 2 Review of key findings from departmental SWOT Analyses
- 3 Development of overall, prioritized SWOT Analysis
- 4 Development of strategic objectives from the SWOT Analysis
- 5 Identification and prioritization of top-level measures
- 6 Identification and prioritization of top-level improvement initiatives

Balanced Scorecard Cascading Workshop

Hands-on Session Teaches Underlying Principles, Tools, & Skills While Building Lower Level Scorecard

The Balanced Scorecard cascading workshop is a structured, facilitated workshop that teaches upper-, mid-, and lower-level managers to quickly and effectively create strategically linked, lower-level Scorecards.

The workshop requires that a sound top-level Scorecard exists, from which workshop attendees may cascade objectives and measures. In addition, specific knowledge of related (and often cross-functional) business processes will be necessary, which will allow the Scorecard owner/manager to identify germane objectives and measures that are aligned to the top-level objectives and measures.

At the conclusion of the workshop, managers will have created a functioning Scorecard that contains the top-down elements necessary to maintain alignment and contribute properly in roll-ups to the strategic level. In addition, managers will have Scorecards that contain meaningful operational objectives and measures, enabling them to effectively manage their area of the organization using the new Scorecard.



Recommended Attendees:

Executive owner of related higher-level Scorecard, owner of target area Scorecard, plus all key process managers within target area.

Duration: Balanced Scorecard Cascading Workshops are typically a ½ day in length. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required. Plan on separate workshops for each target area needing a Scorecard.

Balanced Scorecard Cascading Workshop Topics:

- 1 Review higher-level Scorecard objectives
- 2 Align and array the target area core business processes
- 3 Identify the high-impact processes on the higher-level objectives
- 4 Translate the target area objectives
- 5 Identify the target area process outcome measures
- 6 Align and prioritize target area initiatives
- 7 Compile the final cascaded Scorecard for the target area

Measure Structure Tree Workshop

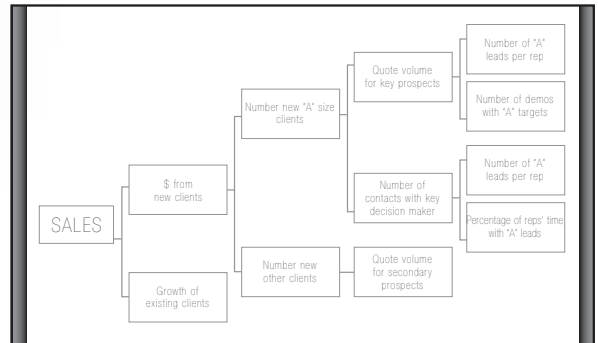
Teaches Attendees to Cascade Causal (Leading) Measures from Existing Higher-Level Scorecards

Once a Balanced Scorecard has been created, the next step is to develop causal hierarchies of lower-level leading measures, which branch off from the Scorecard-level measures. This workshop focuses primarily on using a Structure Tree technique to drive this process.

By creating, tracking, and reviewing this hierarchy of leading measures that have a cause and effect relationship with the top-level measures, an organization is able to manage the predictors of performance, rather than reacting to lagging, time-delayed reports.

In many cases, the lower-level causal measures exist and are being measured elsewhere, so they simply need to be integrated into the proper Scorecard. In some instances, the new measures do not exist and may require a separate auditing process.

At the conclusion of the Measure Structure Tree Workshop, Scorecard owners will have a much more robust management system, which will help identify root causes - and provide a more accurate method for aligning improvement initiatives.



Recommended Attendees:

Executive or manager owner of a Scorecard and key direct reports within target area.

Duration:

Measure Cascading workshops typically run 2 to 3 hours in length. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required. These may be conducted via a web-session conference call or as an on-site workshop. Note that ActiveStrategy Executive Consultants require a 1-day minimum engagement for client-site sessions.

Measure Cascading Workshop Topics:

- 1 Identification of highest priority measures
- 2 Causal measure Structure Tree development
- 3 Identification and placement of measures on appropriate Scorecard
- 4 Measure audit review
- 5 New measure implementation plan review

Business Review Preparation & Facilitation

Superficial Reviews into Meaningful, Scorecard-Based Sessions that Drive Results

Effective and disciplined Scorecard-based Business Reviews represent the linchpin of effective Strategy Execution. Many organizations review strategic and operational performance on a regular basis; however, too many review just financial results or review all results, but with only superficial discussions of below-target performance.

The Business Review Preparation and Facilitation course teaches organizations how to practice and standardize reviews around exception-based analysis, root-cause discovery and elimination, and sound “drill down” techniques, which leads to great leaps in accountability, improved strategic focus, and improved results.

In addition, this course — together with the resulting behavioral and cultural changes — encourage executive and mid-level leadership commitment to the Balanced Scorecard framework, as well as an overall Strategy Execution model.

Preparation Sessions:

The Business Review Preparation session is conducted by a senior ActiveStrategy consultant with the leadership group of an area within the client organization. These sessions help the reviewer prepare for what questions to ask and the reviewees prepare for what answers they should research prior to the actual review.

Live Business Reviews: The Business Review Facilitation occurs during the actual client Organizational Business Review in a particular area, with the added support of an ActiveStrategy Executive Consultant. The Consultant helps keep the review focused and on-course, keeps behaviors oriented toward win-win outcomes, and engrains the new analytical and questioning model.

Duration: Preparation sessions last from one to three hours and can be delivered one-on-one or in small groups. The facilitated sessions are customized to client needs. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required.

Expected Outcomes:

- 1 Instillment of new discipline regarding how to review the performance of a Scorecard
- 2 Coaching of executives on how to run effective sessions that drive toward understanding of root causes and improvement initiatives
- 3 Coaching of direct reports on how to prepare and react to under performance within a Scorecard
- 4 Improved alignment and accountability in the organization
- 5 Identification of key leading measures
- 6 Execution of initiatives to close performance gaps by eliminating root causes
- 7 Establishment of sense of urgency for results

Initiative Alignment & Prioritization Workshop

Helps Organizations Learn to Focus Critical Resources Most Effectively

Balanced Scorecard-based management systems allow organizations to identify the right strategic initiatives on which to expend time, money, and resources. These initiatives are the time-bound improvement projects that are capable of “moving the needles” on the key under performing measures, as well as driving major change events that contribute to the achievement of the overall strategic objectives.

However, all organizations have far too many potential initiatives for their limited resources to undertake successfully, so most struggle with how to prioritize, sequence, align, and eliminate initiatives most effectively.

The ActiveStrategy Initiative Alignment and Prioritization Workshop pairs a senior ActiveStrategy Consultant with an executive team or a manager and his or her direct reports to work through the process of understanding, categorizing, ranking, and assessing the impact of identified initiatives. The output of the workshop is a sub-section of initiatives that have the proper strategic linkage, can be executed with available resources, and will show the highest impact for the organization.

Recommended Attendees:
Executive or manager owner of a Scorecard and key direct reports within area.

Pre-work for Attendees:
Compile a list of all potential and existing Initiatives

Duration: Initiative Alignment and Prioritization Workshops are typically a ½ day in length. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required

Initiative Alignment and Prioritization Workshop Topics:

- 1 Understanding initiatives
- 2 The Balanced Scorecard and initiatives
- 3 Identification and alignment of initiatives
- 4 Opportunity costing
- 5 Identifying and eliminating “Pet Rocks”
- 6 Using a Prioritization Matrix
- 7 Addressing ‘dropped’ initiatives

Green Belt Performance Improvement Training & Certification

Workshop Series on Systematic Problem Solving Emphasizes Linkage of Improvement to Strategy

Certification course teaches attendees how to effectively use the Six Sigma DMAIC (Define-Measure-Analyze-Improve-Control) systematic problem solving process to solve critical business problems. To ensure the utmost in applicability from the training, this course stresses the linkage between systematic problem solving, strategic frameworks such as Balanced Scorecards, and process management.

Attendees who successfully complete this course will be able to:

- ✓ Utilize various analytical tools to systematically define problems, identify root causes, identify and implement lasting solutions
- ✓ Utilize and promote the use of systematic and data-driven thinking and decision making

Team members who successfully complete both the workshop and a subsequent project will earn Green Belt Certification.

For organizations that are not Six Sigma-focused or for those that have other problem solving processes in place (such as PDSA/PDCA), this course may be customized.

KICK-OFF WEB/CONFERENCE CALL SESSION (1½ HOURS PER TEAM):

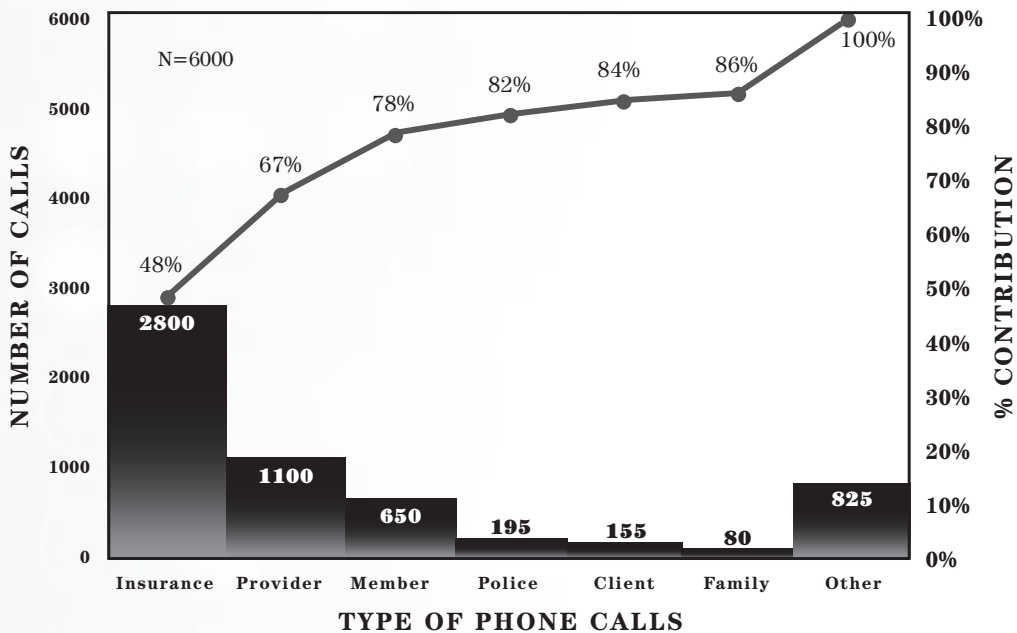
Participants will discuss a previously distributed case, preview the goals and format of the course, and work on building a “project charter” that clearly defines the problem identified for each team’s KPI.

CLASSROOM TRAINING: Includes two days of training on the process, tools, and techniques, interspersed with case studies and breakout practice sessions focusing on the identified KPIs. Workshop participants will thus learn the theory behind each step of the Problem Solving Process, then see its application in a case study format, and finally be able to apply the tools and techniques toward improving a strategically-important issue for your organization.

FOLLOW-UP: To reinforce the learning and the application of the problem solving process, the ActiveStrategy Executive Consultant will return to your site for four separate future consulting days. These days will encompass dedicated sessions for each team during which the Consultant will review the teams’ progress and guide them toward the next step or appropriate tool. These follow-up engagements ensure that the teams feel comfortable with their new skills and also make real progress improving their KPIs.

ADDITIONAL TIME REQUIREMENTS

FOR CONSULTANT: Additional preparation and follow-up time by the ActiveStrategy Executive Consultant will be required. Teams that do not show significant results in their projects or do not demonstrate practical understanding of the problem solving process will not be certified. Additional project coaching and consulting may be arranged to help guide teams toward successful completion.



Pre-work for Attendees:

- ✓ Attendees will receive a solved example problem/case to review during a kick-off web/conference call session.
- ✓ Prior to the first day of the course, each team must identify a real and significant business problem impacting their area (e.g. a Key Performance Indicator — or KPI — that is performing poorly). The team will also need to bring underlying data relevant to this KPI (such as trend graphics), which will be discussed throughout the course.

- ✓ The team should be very familiar with the organizational area affected by the KPI in order to facilitate productive analysis.

Course Format and Duration:

Attendees will be required to participate in all portions of the workshop (kick-off, classroom training with project work, and follow-up) to achieve certification.

Green Belt Training and Certification Topics:

- 1 Description and usage overview of each of the steps in the problem solving process
- 2 Overview of the Seven Basic Quality Control Tools (Graphs, Pareto Charts, Fishbone Diagrams, Histograms, Scatter Diagrams, Check Sheets, and Control Charts) plus an explanation of each tool’s application
- 3 Usage guidelines for numerous helpful techniques, including: brainstorming, multi-voting, prioritization matrices, flow charts, and action plans.
- 4 Interactive exercise for up to three teams (each including one team leader and up to five team members).

Effectively Focusing & Managing Performance Improvement Teams

Prepares Executives & Managers to Lead Green Belt Teams toward Results

To build a long-term focus on strategy-driven Performance Improvement, an organization must train its hands-on teams in systematic problem solving methodologies (such as Six Sigma-based Green Belt Training or PDSA/PDCA). Equally important, but often forgotten, is training for the executives and managers who will supervise these teams.

This course provides these executives and managers with a “big picture” overview, plus the key skills and techniques that will help them get the best results with the most strategic impact from their Performance Improvement teams.

Recommended Attendees:
Executives and managers that have responsibility for one or more Green Belt or Performance Improvement teams.

Duration:
Effectively Focusing and Managing Performance Improvement Teams Workshops typically require one day. Additional preparation and follow-up time by the ActiveStrategy Executive Consultant may be required.

Effectively Focusing & Managing Performance Improvement Teams Topics

Detailed discussions and breakouts address Performance Improvement Team governance issues, including:

- 1** Becoming an engaged champion, supporter, and guide
- 2** Effectively managing project selection and prioritization
- 3** Reviewing Performance Improvement Team Charters
- 4** Conducting Team Progress Reviews
- 5** Participating in partnering process to learn
- 6** Ensuring the validation of team cost savings
- 7** Recognizing success
- 8** Encouraging that team solutions are replicated elsewhere
- 9** Developing a Governance Structure

Process Management & Improvement Training

Teaches a Systematic Process for the Management and Improvement of Core Processes

The ActiveStrategy Process Management course teaches attendees how to choose a key strategic process, map the steps in the process, and identify in-process and end-process measures. In addition the course will teach attendees to identify bottlenecks, how to remove them, and how to develop a control system to manage the process and its key outputs. To ensure the utmost in applicability from the training, this course stresses the linkage between process management, systematic problem solving, and strategic frameworks such as Balanced Scorecards.

Pre-work for Attendees:

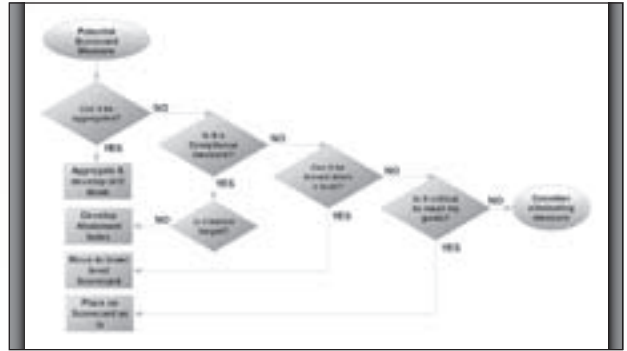
Attendees will work in teams (typically three teams per training session), each of which will examine and work on a key strategic process that needs to be managed and/or improved within their area of responsibility. Thus, each training team should meet with their manager prior to the training to select the key process to address during this session.

Recommended Attendees:

All Managers, Supervisors, and self-directed employees who will be using Process Management Control Systems to manage and control business processes.

Process Management Topics:

- 1 Description and usage overview of each of the steps involved in process management
- 2 Overview of the process flowcharts and Process Management Control Systems, plus an explanation of each technique's application
- 3 Interactive exercise for up to three teams



Course Format and Duration:

CLASSROOM TRAINING: includes two days of training on the methodology, tools, and techniques, with interspersed breakout practice sessions focusing on the three identified processes.

FOLLOW-UP: To reinforce the learning and the application of process management, the measures for the process should be assigned to an owner, reside on their Scorecard (if they have one), and be reviewed on a regular basis by the process owner and his or her manager, ensuring that the process is continuing to meet the customers' requirements.

ADDITIONAL TIME REQUIREMENTS

FOR CONSULTANT: Additional preparation and follow-up time by the ActiveStrategy Executive Consultant will be required. Additional project coaching and consulting may be arranged to help guide teams toward successful completion.

Attendees who successfully complete this course will be able to:

- ✓ Identify and flow chart their key processes
- ✓ Identify the most important stakeholder focused measures for the processes
- ✓ Improve their processes
- ✓ Manage the processes utilizing a Process Management Control System

Personal Goal Management Workshop

Hands-on Workshop Teaches Attendees to Develop Their Own Personal Goals with Strong Linkage to Strategy

The development of proper personal level goals for employees throughout an organization – with proper alignment to strategic objectives and measures – is crucial to achieve true strategy execution. Personal goals articulate the specific expectations held of each employee, so these should relate to the strategic direction of the organization. This strategic linkage becomes even more essential in organizations that tie personal goal achievement to incentive compensation plans, so that the financial rewards are encouraging the most productive behaviors.

Personal Goal Management Consulting Workshop Deliverables:

- 1 Actual development of personal goals for each attending manager's direct reports.
- 2 Alignment of personal goals to the closest relative Scorecard objectives and measures.
- 3 Overview education on how to effectively perform interim individual performance reviews and annual performance appraisals.
- 4 Refresher training on how to complete and use the Personal Goal Management module in ActiveStrategy Enterprise.

ActiveStrategy Personal Goal Management Workshops are facilitated by ActiveStrategy Executive Consultants that have extensive experience in the areas of organizational development, personal goal management, and organizational-level strategy execution methodologies.

Personal Goal Management Consulting Workshop Topics:

STEP 1: THE STRATEGY EXECUTION JOURNEY OVERVIEW

- ✓ The view of Strategy to individual employees
- ✓ The Personal Goal Management cycle

STEP 2: DEVELOPING PERSONAL GOALS

- ✓ Review of Relevant Scorecards
- ✓ Linking Personal Goals (PGs) to Strategic Objectives
- ✓ Developing PGs from past performance
- ✓ Developing PGs for future performance
- ✓ Using SMART characteristics

STEP 3: BREAK OUT SESSIONS

- ✓ Working with direct reports to develop PGs
- ✓ Support and guidance from facilitator
- ✓ Entering PGs into ActiveStrategy Enterprise

STEP 4: ONGOING PROGRESS REPORTING REVIEW

- ✓ Coaching techniques for helping direct reports to achieve PGs
- ✓ Understanding behavioral styles
- ✓ Mechanics of tracking PG progress in ActiveStrategy Enterprise

STEP 5: PERFORMANCE APPRAISAL REVIEW

- ✓ Preparing for appraisals
- ✓ Communication principles
- ✓ Common traps and problems with appraisals
- ✓ Mechanics of entering an appraisal in ActiveStrategy Enterprise

Recommended Attendees:

Operational Managers and their direct reports. This workshop includes a hands-on process that leads to the output of personal goals for a coming appraisal cycle. Generally, up to three management groups can be accommodated with a limit of 20 total people.

Duration: 1/2 day for up to 20 people with up to three managerial groups. Note that ActiveStrategy Executive Consultants require a 1-day minimum engagement.

Personal Goal Management Training Seminar

Teaches Key Personnel to Become Internal Experts on Personal Goal Development and Management

The Personal Goal Management Seminar is specifically designed and targeted for Human Resources (HR) professionals and key operational managers who need to become internal experts on Personal Goal Management.

The ActiveStrategy Personal Goal Management Seminar is delivered by one of several senior ActiveStrategy consultants with extensive experience in the areas of organizational development, personal goal management, and organizational-level strategy execution methodologies.

Personal Goal Management Training Seminar Deliverables:

- 1 Actual development of personal goals for each manager's direct reports (when applicable).
- 2 Education on coaching skill set needed by managers to administer and reinforce personal goals.
- 3 Education on how to effectively perform interim individual performance reviews and annual performance appraisals
- 4 Training on how to complete and use the Personal Goal Management module in ActiveStrategy Enterprise.

Personal Goal Management Training Seminar Topics:

SECTION 1: THE STRATEGY EXECUTION JOURNEY

- ✓The view of Strategy to individual employees
- ✓The Personal Goal Management cycle

SECTION 2: PERSONAL GOAL DEVELOPMENT

- ✓Linking Personal Goals (PGs) to Strategic Objectives
- ✓Developing PGs from past performance
- ✓Developing PGs for future performance
- ✓Working with direct reports to develop PGs
- ✓Using SMART characteristics

SECTION 3: ONGOING PROGRESS REPORTING AND REINFORCEMENT

- ✓Coaching techniques for helping direct reports achieve PGs
- ✓Understanding behavioral styles
- ✓Mechanics of tracking PG progress
- ✓PG data collection and management

SECTION 4: PREPARING FOR PERFORMANCE APPRAISAL

- ✓Preparing for appraisals
- ✓Common traps and problems with appraisals

SECTION 5: SALARY AND WAGE ADMINISTRATION

- ✓Overview of wage and salary program
- ✓Understanding when to grant merit increases
- ✓This portion of the course will be customized based on client's compensation system & goals.

SECTION 6: THE 'DISCUSSION' DURING AN APPRAISAL

- ✓Communication principles
- ✓Discuss steps

Recommended Attendees: HR

Professionals and key Operational Managers who need in-depth training on developing, managing, and appraising the personal goals of their direct reports or other personnel. Classes must have a minimum of ten trainees. Up to 20 may be accommodated with a single instructor and up to 30 trainees may be accommodated with two instructors.

Duration: 2 days

Leadership Training Program

Guidance, Coaching, & Skill Development to Maximize the Effectiveness of New and Current Leaders

To a large part, an organization's success depends on the ability of its leaders to motivate, educate, manage, and communicate most effectively with colleagues.

ActiveStrategy's focused training helps organizations develop the latent potential in all of their managers and executives by providing participants with the skills and tools to function effectively in leadership roles within the enterprise.

Leadership Training Program

Modules: Modules may be delivered one-at-a-time or grouped into larger programs

MODULE 1 – TRANSITION TO LEADER

This Module helps the employee with new leadership responsibilities assess their own leadership strengths and opportunities for improvement, while also imparting fundamental leadership skills to make the transition smooth and productive.

Topics include:

- Enterprise Competencies
- Covey's Circles of Influence
- Challenges in Transition to Supervision
- Six Leadership Accountabilities
- Personal Profile System® (DiSC)
- Leadership Principles
- Competency Development Planning

MODULE 2 – LEAD EXCELLENT PERFORMANCE AND RESULTS

This Module helps leaders ensure ongoing achievement from their teams by teaching them how to motivate, develop, coach, and manage individual employees, as well as the team as a whole most effectively.

Topics include:

- Fostering motivation
- Recognition and real appreciation
- Blanchard's Four Leadership Styles
- Coaching interaction skills
- Delegation
- Competency development planning

MODULE 3 – SUPPORT THE ORGANIZATION'S VISION

This Module teaches leaders how to ensure that team and individual efforts are best focused toward the achievement of the organization's highest strategic goals through both inward and outward analysis, change management, and organizational alignment.

Topics include:

- Current business environment
- Keeping an eye on the competition
- Organizational alignment
- Reasons to be proud of the enterprise
- Managing in a changing environment
- Accepting change
- Leading change
- Competency development planning

MODULE 4 – DEVELOP A HIGH PERFORMANCE WORKFORCE

This Module delves into the workforce performance issues that every leader must manage in order to build and sustain a strong team, with the right skill sets, and within the most conducive environment for peak performance.

Topics include:

- Staffing for high performance
- Interview/Selection processes
- Behavioral interviewing
- Equipping your workforce
- Fostering cooperation and teamwork
- Analyzing organizational structure
- Influencing workplace atmosphere
- Dealing with conflict
- Competency development planning

MODULE 5 – BUILD BUSINESS PARTNERSHIPS

This Module helps leaders learn to take advantage of internal and external business relationships to become more successful. It also imparts critical communication skills that can be applied to any business situation.

Topics include:

- Cooperative business partnerships
- Leveraging networks
- Fostering open communication
- Active listening
- Speaking effectively
- Competency development planning

MODULE 6 – MAINTAIN THE LEADERSHIP EDGE

This Module focuses on some of the less tangible aspects of strong leadership. Though they may seem less concrete, these skills nonetheless may be practiced and honed, which this Module teaches attendees to do.

*The Leadership **EDGE** consists of:*

E is for Energy & Enthusiasm

D is for Developing Self

G is for Guts

E is for Effectiveness

This Module will conclude with Competency Development Planning.

Recommended Attendees:

Any Employees taking on leadership roles with the organization.

Duration: Together, these Modules represent about eight days of workshop/coaching time. However, the Modules can be packaged and configured to best suit the needs of each client. Individual Modules may be delivered as a single-topic, 2-day workshop. Or, for a more comprehensive approach, the entire set of Modules may be combined into three, 2-day workshops, followed by an additional two days on site for follow-up coaching after the participant has been in the new leadership position for six months. Additional pre-work by the ActiveStrategy consultant may be required.

SECTION II

*Technical Training
Courses*

Administrator Training for ActiveStrategy Enterprise

Teaches Skills Needed to Manage the Administration of an ASE Deployment

ActiveStrategy Administrator Training covers all elements relevant to a system administrator of an ActiveStrategy Enterprise (ASE) software deployment. This includes complete system control as well as minor user configurations. Hands-on practice included throughout the session.

Administrator Training Topics:

This training teaches attendees to create, edit, and manage the following ActiveStrategy Enterprise elements:

- ✓ Briefing Books
- ✓ Dashboards
- ✓ Discussion Templates
- ✓ Groups
- ✓ Initiatives
- ✓ Initiative Templates
- ✓ Measures
- ✓ Objectives
- ✓ Organizational Levels
- ✓ Period Categories and Periods
- ✓ Personal Goal Management
- ✓ Perspectives
- ✓ Program Groups
- ✓ Scorecard Column Options
- ✓ Scorecards
- ✓ Six Sigma Dashboards
- ✓ Stoplight Charts
- ✓ System Terminology
- ✓ Users

Additionally, attendees will learn about:

- ✓ Basic Profile Maintenance
- ✓ Quick Link Maintenance

Recommended Attendees:

All client employees responsible for system administration.

Skill pre-requisites for attendees:

- ✓ A fair understanding of the Balanced Scorecard basic concepts
- ✓ A fair understanding of ActiveStrategy Enterprise end-user concepts.

Duration: 1 Day

Power User Training for ActiveStrategy Enterprise

Intensive Training Prepares Users Who Will Need to Go Beyond the Basics in ActiveStrategy Enterprise

ActiveStrategy Power User Training digs into all of the major features typically used by more sophisticated, in-depth ActiveStrategy Enterprise (ASE) software users, including those features used by Regional Administrators. After the training, attendees will be prepared to utilize the application for their own 'user' purposes and will also be able to provide support to other users within a deployment.

ActiveStrategy Power User Training Topics include:

- ✓ Log-in procedures

- ✓ Navigation of the Main Page & Quick Links

- ✓ Viewing, adding, linking, and deleting:
 - Dashboards
 - Scorecards
 - Briefing Books
 - Program Groups
 - Six Sigma Dashboards
 - Objectives
 - Measures
 - Initiatives

- ✓ Entering Variance Reports

- ✓ Entering relevant information for Initiatives and Tasks

- ✓ Setting up and using Email Alerts

- ✓ Viewing Reports

- ✓ Setting up ownership for ASE Objects

Recommended Attendees:

All key personnel who will need to be able to create, edit, link, and delete objects within the system, as well as those that need to support other users.

Skill pre-requisites for attendees:

- ✓ A fair understanding of the Balanced Scorecard basic concepts.
- ✓ A fair understanding of ActiveStrategy Enterprise end-user concepts.
- ✓ A good aptitude for software systems, as well as modern user interface and navigation concepts.

Duration: 1/2 Day. Note that ActiveStrategy Executive Consultants require a 1-day minimum engagement for client-site sessions.



User Training for ActiveStrategy Enterprise

Basic, Hands-on Training for Typical ActiveStrategy Enterprise Business Users

The User Training Session will cover all of the features utilized by the average system user. This session is designed to enable a typical user to navigate the application, locate critical information and enter data.

Recommended Attendees: All client employees who will be involved in the ActiveStrategy Enterprise deployment.

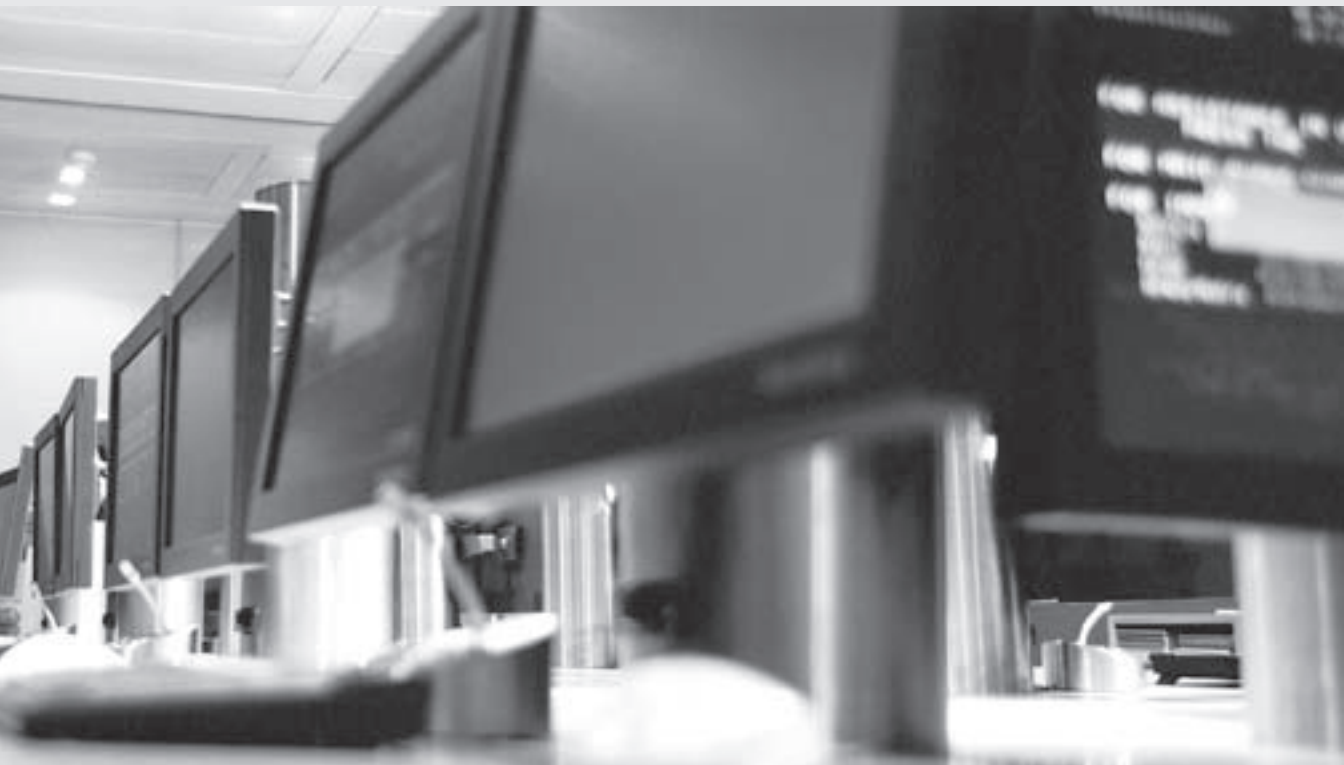
Skill pre-requisites for attendees:

- ✓ A fair understanding of the Balanced Scorecard basic concepts.

Duration: 2-3 hours per session. Note that ActiveStrategy Executive Consultants require a 1-day minimum engagement for client-site sessions.

User Training Topics: *This training teaches attendees basic functionality for these ActiveStrategy Enterprise elements:*

- ✓ Log-in process
- ✓ Viewing Objectives
- ✓ Navigation of the Main Page & Quick Links
- ✓ Viewing Measures, entering Measure data, & entering Variance Reports
- ✓ Viewing Dashboards
- ✓ Viewing Initiatives and entering relevant information to Initiatives & Tasks
- ✓ Viewing Scorecards
- ✓ Viewing Briefing Books



Server Maintenance Training for ActiveStrategy Enterprise

Technical Training Prepares Your Staff to Properly Maintain ActiveStrategy Servers

ActiveStrategy Server Maintenance Training provides an overview of all topics related to installing, maintaining, and upgrading an ActiveStrategy Enterprise deployment.

ActiveStrategy Server Maintenance Training Topics Include:

ASE System Architecture

Overview:

- How to install and support the application and its components over time

Initial Installation Process

Overview:

- Installation and server set-up processes for ActiveStrategy Enterprise for the web server, component server, application server, and database server

Alternate Server Configuration

Overview:

- Outlines configurations that incorporate from one up to four servers
- Covers processes for properly maintaining multiple environments (i.e. development, test, and production)

Service Pack Update Overview:

- Describes how system upgrades and patches are made

Live Installation and Server Setup (if training occurs at client site):

- Physically install the application in one of the client environments
- Review and document all client server settings, procedures, and security issues that are pertinent to the installation

Troubleshooting & Documentation:

- Address and troubleshoot any non-standard or unexpected occurrences due to unique client environmental variables
- Will create documentation to address issues found

Recommended Attendees:

Client employees responsible for installing and maintaining the application on client servers.

Skill pre-requisites for attendees:

- ✓ A great understanding of application servers.
- ✓ A great understanding of Microsoft IIS.
- ✓ A great understanding of the client-specific network security settings.
- ✓ A good understanding of Oracle or MS SQL Server.
- ✓ A good understanding of web applications in general.

Duration: 1 day



Application Configuration Training

Technical Training Covers Ways to Configure System to Match Client Needs

ActiveStrategy Application Configuration Training covers a wide array of topics that will provide attendees with a solid understanding of how to configure an ActiveStrategy Enterprise deployment to meet your unique organizational needs.

Day One Topics Include:

- ✓ ASE System Architecture Overview
 - Includes overview of COM+ objects, Services, MS IIS, panes vs. profiles and the ASE Directory structure
- ✓ Platform vs. Application Overview
 - Covers the way in which the ActiveStrategy Enterprise application represents both a pre-configured application of functionality and a development platform environment from which to extend new functionality
- ✓ Administrative Function Overview

Day Two Topics Include:

- ✓ Preparing System for Configuration
 - Includes COM+ Object Pooling, using Debug Mode, and using the Session Directory
- ✓ Creating Objects with ActiveDesigner™
 - Making both View and Add objects within the system
- ✓ Creating Style Sheets
 - Editing and adding new XSLT style sheets

Day Three Topics Include:

- ✓ Troubleshooting
 - Testing Database Connectivity, viewing the Event Log, and using ActiveObject.asp
- ✓ Creation and Testing of New Object
 - Produce an actual object and style sheet that trainees bring to create.

At the conclusion of this session, trainees should be self-sufficient with new object and style sheet creation for View and Add objects.

Recommended Attendees:

Client employees responsible for application configurations. A maximum of three trainees may be accommodated per session.

Attendees must bring:

- ✓ Sample Reports
- ✓ Sample Scorecards
- ✓ Sample HTML (or Microsoft Office) documents

Equipment Requirements:

- ✓ A laptop/desktop configured with:
 - Windows 2000 Professional or Server (Windows XP is workable, but not recommended)
 - Microsoft SQL Server with Service Pack 3
 - Microsoft Internet Explorer 5.5 or higher
 - Microsoft Internet Information Services (IIS)
 - Microsoft Services
 - All of the latest updates from Windows Update
 - All Administrator passwords used for training machine

Duration: 3 days



Skill pre-requisites for attendees:

- ✓ A good understanding of Microsoft XSLT XML technology
- ✓ A good understanding of HTML technology
- ✓ A good understanding of JavaScript technology
- ✓ A fair understanding of ASP technology
- ✓ A good understanding of SQL databases (Oracle and/or MS SQL Server)
- ✓ A fair understanding of the Balanced Scorecard basic concepts
- ✓ A fair understanding of ActiveStrategy Enterprise end-user concepts

Data Integration Training

Technical Overview Covers Ways to Link and Integrate Data from Various Sources to ActiveStrategy Enterprise

ActiveStrategy Data Integration Training covers a wide array of topics that will provide attendees with a solid understanding of how to tie various client systems and data sources into ActiveStrategy Enterprise most successfully.

Day One Topics Include:

- ✓ ASE Data Model Orientation

- ✓ Data Source Discussion: includes optimal methods for extracting and loading data from other data systems, data warehouses, and flat files

- ✓ ActiveStudio™ and ActiveMapper™ Orientation: discusses concepts and ways to create data maps

Day Two Topics Include:

- ✓ ActiveLoader™ Orientation: how and when to schedule data loads, as well as how to review the logs

- ✓ ActiveMapper™ Map File Practice Session

- ✓ ActiveLoader Job Load Practice Session

Day Three Topics Include:

- ✓ Target Data Map and Load: trainees are expected to arrive at training with actual data files to load that will be used in their production system. This third and final day is spent writing the real data map and running the job loader. At this point, trainees should be self-sufficient in writing new data maps and maintaining the existing maps.

Skill pre-requisites for attendees:

- ✓ A good understanding of SQL databases and SQL queries (Oracle and/or MS SQL Server)

- ✓ A great understanding of legacy data sources (SAP, PeopleSoft, etc.)

- ✓ A good understanding of XML technology. (no XSL/ ASP/ HTML/ JavaScript is required)

- ✓ A good understanding of basic Balanced Scorecard concepts

- ✓ A good understanding of ActiveStrategy Enterprise end-user concepts

Recommended Attendees:

Client employees responsible for the technical transfer of large amounts of data into ActiveStrategy Enterprise.

Duration: 3 days

SECTION III

*Technical
Services*

Data & Content Management Services

Overview of the ActiveStrategy Data Services Group Offerings

The most difficult portion of any performance management system roll-out is arguably the identification, sourcing, collecting, reconciling, and loading of content and data. Many organizations underestimate the effort required to identify source systems, individual owners, periodic goal targets, and much more.

In addition, as client organizations grow and expand their Balanced Scorecard systems, new data sets and content structures need to be quickly and accurately integrated into the overall structure of the existing performance management system. Often, the resources simply are not available to perform the tasks or existing processes and methods are non-existent to ensure efficient and effective results.

To address this set of challenges, the ActiveStrategy Data Services Group provides a suite of services that assist clients through the difficult processes of data and content management for performance management information.

THE FOLLOWING ARE EXAMPLES OF COMMONLY OFFERED SERVICES:

Content Creation and Management

During the initial creation of Scorecard information, including objectives and measures, ActiveStrategy data analysts can streamline the process by leveraging deep knowledge of the software application system along with experience from clients in multiple industries and organization types. As a result, highly organized, succinct, and properly linked content is loaded into the system, thus speeding the overall implementation timeline, while improving assimilation by end-users.

Data Audit Support

Data Audit Support is most often provided during initial system roll-outs. During this phase, ActiveStrategy helps clients with the process of identifying high-value metric data and all of the required attributes necessary to support an ongoing Balanced Scorecard or similar framework. Leveraging existing metadata templates, ActiveStrategy data analysts assist in gathering metric metadata, locating trustworthy sources, establishing ownership, and creating documentation trails for repeatability.

Replication Services and Tools

ActiveStrategy data analysts can assist in post-project phases to further deploy content (i.e. Dashboards and Scorecards) more widely throughout an organization. Replication services are most typically used when an organization wishes to deploy templates across similar organizations, either hierarchically or geographically. The process is enabled with a set of technology tools, of which clients may also directly take possession, given the proper training.

Data Archiving and Fiscal/Calendar Year Turnover

When client organizations reach fiscal or calendar-year boundaries, the associated performance management frameworks need to transfer from the current year content to the next year content. This may require archiving of older content and data. Often, both old and new content and data will need to co-exist for a specific period of time. ActiveStrategy data analysts directly assist by designing the process, plus physically altering and archiving content and data during these transition periods.

Please contact your Account Consultant to learn more about these services and to discuss details and pricing for your specific projects.





See our upcoming scheduled courses at www.activestrategy.com/ASuniversity

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We are the glue between the formulation of strategy and real world execution.