

Service Category

- Leadership Development
- Human Resource Management
- Management Services

Program Title

Strategic Planning for Governing Boards

Program Description

This management service is offered to assist the governing boards of companies, agencies, and non-profit organizations with developing their strategic plans and charting the overall direction for their organization. We will first review the strategic planning process and then directly apply that process to the strategic plan of the client. We will cover the importance of organizational values, mission, and vision in shaping the strategic direction of the organization. We will then facilitate the development of strategic goals and objectives. We will also identify the resource requirements for meeting the desired outcomes. With the products produced from the workshop, the staff and management of the organization can then readily take the information and initiate their planning and execution processes.

Program Duration

~ 4 to 8 hours depending upon where the organization is at currently in their planning process and the detail of the desired outcomes

Concepts Presented in the Service

- o The 8-Step Strategic Planning Process
- o The Importance of Values for an Organization
- o The Role of Mission and Vision for an Organization
- o Strategic vs. Operational Planning
- o Goals
- o Objectives
- o Resourcing the Plan

Recommended Participants

Governing boards and senior program managers for agencies, companies, or organizations

Maximum Number of Participants: The entire board or planning group

Program Notes

This service is particularly beneficial for governing boards that need to develop a more coherent and comprehensive direction for their organization and to give staff and management have clear guidance and direction in order to chart their future endeavors.

Service Category

- Leadership Development
- Human Resource Management
- Management Services

Management Service

Citizen-Group and Project-Governing Board Facilitation

Service Description

When citizen groups or teams are formed to work on a special project, report, program, or plan, it is usually best if the group is facilitated by trained professionals. Facilitated sessions will help ensure that the group stays on task, that the effort is inclusive of all members, and that the group meets the expectations of the body that formed the group. Our facilitator experience includes local, regional, and national experience in facilitating groups to work together in order to find common ground and produce the needed products within the expected timeline.

Estimated Duration

The duration of the service depends on the nature of the group, the project itself, and the desired outcomes from the group's activities. It can be as short as one day or several days spread out over several months.

Concepts Incorporated in the Service

- Citizen-group Effectiveness
- Meeting Goals, Deadlines, and Expectations
- Team Building
- Group Communications
- Reaching Common Ground
- Obtaining Consensus
- Organizational Charters
- Working Group Operations

Service Notes

The application of this service can be widely varied depending on the situation, the nature of the problem, and the composition of the group.

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Program Title

Effective Marketing Strategies

Program Description

This management service is offered to assist small businesses and companies develop a more comprehensive and effective marketing program. The workshop includes an overview of the basic concepts associated with marketing followed by assistance with helping to develop a more effective marketing program for the organization, company, small business, or agency.

Program Duration

~ 2 hours for the marketing overview portion of the service followed by one-on-one marketing strategy development

Concepts Presented in the Service

- The Promotional Mix
- The Marketing Mix
- Product Promotion
- Service Promotion
- Marketing Strategies

Recommended Participants

Any company, business, organization, or agency desiring to improve their marketing and sales processes and programs

Program Notes

This service is uniquely beneficial for a new business or company venture. The service can also be readily applied to an existing firm or organization desiring to improve their sales and promotions.

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- Leadership Development
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Management Service

Employee Handbook Development

Service Description

Many smaller companies cannot afford to have a dedicated Human Resource Manager; however, the functions of HR must still be performed within any size organization. Our Employee Handbook Development service is aimed at helping the client develop and institutionalize a complete HR program without having to hire full-time staff to implement the program.

The focus is on meeting the federal and state requirements for HR management along with doing the right HR management for the employees. We can help streamline existing processes to make them more manageable or create an improved process that can be readily administered by someone with HR functions as an additional duty requirement.

Estimated Duration

Depending upon where the client is currently at with their HR program, we can usually create the new or improved program within 5-10 days. Some one-on-one training will be conducted during the period.

Concepts Incorporated in the Service

- Employee Handbook
- Affirmative Action Plan
- EEOC Compliance
- FMLA/ADA Compliance
- Performance Counseling Management
- Training Program Management
- Absenteeism
- Emergency Procedures
- Salary Administration

Service Notes

The service is for any client, particularly smaller size companies, that need to create a more streamlined and compliant HR program. Our emphasis is on making a program that is simple, meets the legal requirements, and satisfies the need to have the program run by someone not specifically dedicated for HR operations.

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- Leadership Development
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Management Service

Facilitating a Quality Management/Continuous Improvement Team

Service Description

Quality management teams often need a jump-start to get them going in the right direction. Additionally, existing teams may need outside assistance to evaluate where they are at and help find direction in where they need to go. Teams may also need a facilitated effort to work through difficult issues, problems, and other concerns.

This service is aimed at assisting quality management teams, Home Teams, 30-60-90 Day Review teams, Continuous Improvement teams, and other similar groups with assessing where they are now and how to keep moving forward with the improvement program.

Estimated Duration

The duration of the service depends in part on the current status of the team. Sometimes, only one facilitated sessions (4-8 hours) is all that is needed and other times, several sessions may be needed.

Concepts Incorporated in the Service

- Quality Management Concepts and Programs
- Dealing with Conflict
- Inter and Intra Team Communications
- Inspiring Change
- Motivating for Improvement

Service Notes

The application of this service can be widely varied depending upon where the team and the company are at in terms of their quality management program. This service works well when there is a need to bring together two or more different teams in order to synchronize the effort and resolve conflicting demands.

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Management Service

Human Resource Management for Small Business

Service Description

Regardless of the size of a business or company, the functional requirements for effective human resource management remain. Small businesses can seldom afford to have a dedicated person to fulfill the HR functional needs of the company. Such needs include skill training, handbook development, performance appraisal program management, corrective action program management, and EEO/ADA/AAP compliance. Typically, the business owner or designee assumes these functional needs as an additional duty or responsibility. Our HR service package includes establishing and/or reviewing these critical programs and creating a more manageable HR program so that the owners and employees can focus on their business rather than on HR compliance.

Estimated Duration

For most small businesses, we can readily get your HR program where it needs to be in 3 to 10 days depending on the current status of the HR program and the unique requirements of the company.

Concepts Incorporated in the Service

- Equal Employment Opportunity
- Affirmative Action Plan
- Federal Compliance
- The Employee Handbook
- Job Descriptions
- Performance Appraisal Program Management
- Corrective Action Program Management

Service Notes

The application of this service can be widely varied depending on the requirements of the company and its HR needs.

Service Category

- Leadership Development
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Management Service

New Leader Selection Process

Service Description

Companies that promote from within the organization from hourly to supervisor are often faced with the concern of how to more effectively identify, mentor, select, promote, and train the employee. Often, promotion is based on acquired skills required at the hourly level with only some emphasis on leadership/supervision potential.

The service is targeted to improve how companies conduct their supervisor selection process by employing proven tools and strategies for the process that key on objectively measuring the potential to become an effective leader for the organization.

Estimated Duration

Depending upon where the client is currently at with their supervisor selection process, we can usually create the new or improved system within 5-10 days.

Concepts Incorporated in the Service

- Leadership trait identification
- Selection Process
- Subjective Measures
- Objective Measures
- Performance Counseling
- Interviewing for Potential
- Situational Interviewing Techniques
- Mentoring

Service Notes

The service is for any client that would like to improve their supervisor selection program to better identify and create future leaders that will carry the organization forward with continuous improvement and leading change.

We will work with you to incorporate your organization's values, mission, goals, and vision into the supervisor selection process in addition to the traditional skill-based approach.

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Management Service

One-on-One Mentoring

Service Description

This service is aimed at improving the leadership skills of any supervisor, manager, or executive through one-on-one mentoring. The focus is on improving the leadership competency of the individual and help with problem-solving, issue management, and leadership development.

We can also help you with obtaining your formal educational goals through our associations with two on-line, accredited, universities. We can mentor you through a BS, MBA, or even a Ph.D. program with either Northcentral University or Columbia Southern University.

Estimated Duration

Depends upon the needs of the client and the specific mentoring requirement

Concepts Incorporated in the Service

- Individual Leadership Development
- Degree Programs
- Problem Solving
- Issue Identification
- Communications
- Leadership Competency

Service Notes

Our focus with this service is on obtaining timely results for the client by applying practical and meaningful leadership tools through mentoring and formal education.

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- Leadership Development
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Management Service

Organizational Climate Assessment Surveys

Service Description

Organizational climate is the general mood and feeling of the operational environment within the company. Organizational climate relates to what the employees think the company as a whole is all about relative to critical issues including diversity, equal employment opportunity, the company's values, legal compliance, consistency with current policies, consistency with the administration of current procedures, and possible reaction to change initiatives. Often it is the organizational climate that determines whether or not a company will be able to move forward with new initiatives and change.

Before launching any major new initiative and to assess the legal compliance of the company, we recommend asking the employees what they think in terms of these and any other critical issues.

We will design and implement a survey program that is specifically shaped to meet the needs of the client and one that provides meaningful outcomes that can be readily translated into action plans for organizational improvement. We do not use "off the shelf" surveys, but rather we will build you a new instrument that is designed around your company and your specific requirements.

Estimated Duration

It usually takes 3-5 days to develop the survey/questionnaire, 2-3 weeks to administer the survey (depending upon the locations and size of the company), and then 5-10 days to compile the information and prepare the report. We recommend re-surveying the employees 8-12 months after the initial effort in order to assess the results of any new measures taken to address areas of concern generated from the initial survey.

Concepts Incorporated in the Service

- The Company's Mission, Vision, and Values
- Legal Compliance
- Organizational Climate

Service Notes

After we have assisted you with the design and implementation of the initial survey program, we will leave you with a program that can be readily duplicated by you in the future without needing outside assistance.

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Management Service

Performance Appraisal Program Development

Service Description

Most companies do some type of performance counseling. Often performance counseling is focused on the particular trade skills required for the position. Effective performance counseling includes not only the trade skills, but also the leadership values, skills, and actions required for more effective business operations. The service will help the client develop a more efficient and effective performance counseling process that readily incorporates the vision and goals of the company. The service also addresses the legal requirements for job descriptions, physical specifications of the job descriptions, and performance-based counseling.

Estimated Duration

Depending upon where the client is currently at with their Performance Counseling Program, we can usually create the new program or improve the current program within 10-15 days.

Concepts Incorporated in the Service

- Technical vs. Leadership criteria for performance counseling
- Values
- Organizational Vision and Mission
- Job Description Development
- Legal Requirements
- Program Initiation

Service Notes

The service can apply for both clients who are just starting to develop an annual/semi-annual performance counseling system or for clients who already have a system in place but need some improvement with the program and quality of the system.

We will work with you to incorporate your organization's values, mission, goals, and vision into the performance counseling system so that your desires are translated into objective and subjective measures for the employees.

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Program Title

Personality Testing and Training

Program Description

The Peregrine Leadership Institute is a certified administer for the Myers-Briggs testing program.

The *Myers-Briggs Type Indicator®* (MBTI®) instrument offers a practical yet powerful set of tools for lifelong growth and development. After more than 50 years, the MBTI instrument continues to be the most trusted and widely used assessment in the world for understanding individual differences and uncovering new ways to work and interact with others. More than 2 million assessments are administered to individuals—including employees of many Fortune 500 companies—annually in the United States alone.

We can administer the MBTI instrument, help interpret the results, and provide instruction on how to effectively use the MBTI results for individual and organizational improvement. There are several different types of MBTI instruments that you can readily employ depending upon your desired outcomes from the results.

Program Duration

~ 1 hour to administer the instrument; ~ 4-8 hours to analyze the results and provide coaching and training on how to employ the results effectively

Concepts Presented in the Service

- Personality Types
- Leadership
- Situational Leadership
- Personality Trends

Recommended Participants

Any employee, team, department, or organization

Program Notes

This service is particularly beneficial when incorporated into a comprehensive leadership development program for team members, new supervisors, experienced supervisors, managers, and executives. The service compliments our Leadership Foundations and Supervisory Leadership program.

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Program Title

Quality Customer Service

Program Description

This program is designed for employees and supervisors who deal on a regular basis with customer service. We will teach the basics of customer service principles and then through practical application, show course participants techniques and tactics to improve customer service.

Program Duration

~ 4 Hours

Concepts Presented in the Program

- o Customer Requirements
- o Customer Attention
- o Customer Service
- o Supervision of Customer Service Representatives

Recommended Participants

Employees and supervisors directly involved in sales and customer service
Maximum Number of Participants: 30

Program Notes

This program would be particularly beneficial for a small business or company that wants to revitalize the skills and abilities of their customer service employees. The program can also be shaped to teach the important customer service skills to new employees who may be unfamiliar with customer service requirements.

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Management Service

Strategic Leadership and Executive Team Building

Service Description

This service is aimed at facilitating the leadership at the most senior levels of an organization. We employ both historical and contemporary military and business examples to provide a frame of reference for the group in order to address:

- Values
- Vision
- Mission
- Operating Principles
- Executive Team Responsibilities
- Executive Team Performance

Estimated Duration

Typical workshops usually run about a day depending upon the needs of the client and the organization of the executive team. It is best if the entire executive team participates in the workshop in order to create the shared understanding necessary to effectively run the company.

Concepts Incorporated in the Service

- The Role of Values in an Organization
- Operating Principles for the Company and the Senior Leadership
- Developing and Implementing a Leadership Vision and Philosophy
- Executive Team Building
- Strategic Planning (SWOT Analysis)
- Organizational Constitution for Good Governance

Service Notes

This service is particularly well suited for a team following a recent reorganization or change in senior leadership.

The basic concept is that before the company can perform well, the senior leadership of the organization must have a clear and compelling vision to carry forward into the company.

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Management Service

Workshop Facilitation

Service Description

When two or more interest groups (companies, governmental agencies, citizen groups, nongovernmental organizations, etc.) must work on a project together, it is often best if the team is formally facilitated by trained professionals. Our facilitator experience includes local, regional, and national experience in facilitating groups working together on a problem management and issue resolution.

Estimated Duration

The duration of the service depends on the nature of the working group. It can be as short as one day or several days spread out over several months.

Concepts Incorporated in the Service

- Team Building
- Team Communications
- Reaching Common Ground
- Obtaining Consensus
- Organizational Charters
- Working Group Operations

Service Notes

The application of this service can be widely varied depending on the situation, the nature of the problem, and the composition of the interest groups