



DETAILED COURSE DESCRIPTIONS

Course Descriptions for Customized Training
Programs



OVERVIEW

Untapped Potential is an immersive 12-month training experience that is instructor led and combines direct instruction, hands-on training, and one-on-one coaching to develop the skills and capabilities required to achieve desired learner outcomes.

Learning How to Scale, Grow, Delight, and Standout

The Untapped Potential training program is divided across four modules and will take approximately 12 months to complete. Modules and courses have been sequenced in a manner for learners to continuously build their skillsets and capabilities and see immediate tangible results as they apply these learnings within their business.

The four modules are as follows:

1. Developing Your Game Plan & Building Leadership Accountability
2. Managing Your Numbers & Building Execution Discipline
3. Competing on Customer & Employee Experience
4. Operational Agility & Developing Scalable Processes

If a total of three or more learners participate from the same company, we will:

- Provide two instructors from Stack'd Consulting to support delivery.
- Provide six hours of complimentary one-on-one coaching per quarter.

Customized Training Programs

We understand that some clients may want to select specific modules or individual courses from the Untapped Potential program. Please contact us and we will work with you to develop a customized training program that is aligned with your requirements.

Delivery:

All courses can be delivered in person or online based on our client's requirements and the safety practices being followed related to Covid-19. For online delivery of course material, we will use leading technologies including Zoom, Microsoft Team's, and Miro Real-Time Whiteboard.

Instruction:

The courses are delivered by instructors from Stack'd Consulting who have extensive experience in supporting leaders and their company's transform, grow, scale, and delight across a variety of industries and company sizes. All Untapped Potential course delivery is overseen and managed by Dustin Anderson, CEO and Founder of Stack'd Consulting.

Evaluation:

Our courses are intended to provide hands-on experiential learning experiences and each course will result in the creation of a course deliverable. Course deliverables will be reviewed upon course completion and a certificate of completion will be provided to learners. A detailed description of each course in the module and its evaluation requirements are presented below.

Detailed Course Information

| Course | Course # | # of Hours | Cost Per Learner |
|--|----------------|------------|------------------|
| <p>Strategic Plan Development: The purpose of this course is to learn how to develop a 2 to 3-year strategic plan for your company that is grounded by your company's purpose, outlines how you will in the market, and provides clarity in a simplistic and pragmatic way to support the execution of the strategic plan.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Define a company's purpose and use that purpose to guide decision making and to attract and retain customers and employees • Establish and evaluate a company's core values • Evaluate a company's current culture and identify required changes to make culture a competitive advantage • Complete a strategic assessment in support of the development of a company's strategy • Establish a winning aspiration and overall strategic direction for a company • Evaluate potential strategies and test strategic concepts that will contribute to the achievement of the company's desired strategic outcomes • Define measures to track the progress of executing your company's strategic plan • Prioritize, sequence, and execute a company's strategic plan using leading practices such as how to identify, select, and prioritize quarterly objectives and key results (OKRs) <p>Course Evaluation: The successful documentation and completion of the one-page strategic plan including quarterly OKRs with assigned accountabilities.</p> | <p>BYSGP01</p> | <p>14</p> | <p>\$2100</p> |

| Course | Course # | # of Hours | Cost Per Learner |
|---|----------|------------|------------------|
| <p>Design Your Business and Operating Model: The purpose of this course is to learn how to design and assess a company's business and operating model so that it is unique, creates competitive advantage, is valued by customers, and is profitable.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Document your company's business and operating model • Define your company's business model so that it is aligned with your purpose, brand, and strategic direction. In addition, defines your unique product and service offering that will create exceptional value for your targeted customer base • Identify different revenue models to support your business model so that it provides predictable cash flow (e.g. different strategies to increase monthly recurring revenues) • Align your cost model with your revenue model so that the company generates profits and is scalable and realistic given your forecasted cash flow and available capital (e.g. equity and borrowing capacity) • Explore the strategic options and decisions available in designing a company's operating model to enable the execution of its business model • Assess the implications of changes in your company's strategic direction on your company's business and operating model <p>Course Evaluation: The successful documentation and completion of the company's business plan and operating model.</p> | BYSGP02 | 6 | \$900 |
| <p>Organizational Accountability and Structure: The purpose of this course is to learn how to develop a company's organizational structure and establish leadership accountabilities to promote organizational clarity and enable the company to execute on its strategic and operational priorities.</p> | BYSGP03 | 4 | \$600 |

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| <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Define leadership accountability to support your strategic direction and operational priorities in the short-term and as the company scales and grows Use an organizational capability model to support the development of the company’s organizational structure, define leadership accountabilities, and determine if you have the right people in the right seats for both the short and long-term Develop leadership accountability agreements for each of the company’s leaders to increase clarity in accountability, day-to-day responsibilities, and decision-making authority <p>Course Evaluation: The successful documentation of the company’s capability model to support organizational and people decisions. In addition, the documentation and communication of the participants accountability agreement.</p> | | | |
| <p>Leadership Team Health (Pt 1): This is the first course in a series of four that is focused on building a high performing leadership team to support the growth of your company. The purpose of this initial course is to learn about Patrick Lencioni’s Five Dysfunctions of a Team and how to assess the health of your leadership team. This course will include completing an assessment of your company’s leadership team to understand where there are opportunities to increase the team’s health and performance. Within this course we will focus primarily on how the leadership team can improve its level of trust amongst team members.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Use Patrick Lencioni’s Five Dysfunctions of a team to assess your leadership team’s health and performance Analyze the results of the “Five Dysfunctions of a Team Assessment” to identify opportunities to improve the leadership team’s health and performance | DCT01 | 4 | \$600 |

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| <ul style="list-style-type: none"> Improve trust amongst the leadership team by being vulnerable and understanding each team members story, motivations, strengths, and weaknesses <p>Course Evaluation: The successful completion of the 'Trust' exercise with the company's leadership team.</p> | | | |
| <p>Leadership Mindset The purpose of this course is to help leaders explore the mindsets required to be a great leader. We will leverage leading practices from a variety of thought leaders on how to choose your mindset so that you are showing up and behaving like a leader.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Identify your leadership mindset and how to adjust it in different scenarios to achieve high levels of performance Recognize and build daily leadership habits required to lead your team day-to-day Identify the two-to-three roadblocks that are keeping you from being a great leader Set and make commitments to build your leadership capabilities and become a better leader <p>Course Evaluation: The successful completion and documentation of individual and shared commitments that leaders will make to each other and their teams, including the identification of check points to measure progress.</p> | DCTO2 | 4 | \$600 |
| <p>Leadership Team Health (Pt 2): The purpose of this course is a continuation of how to further improve leadership team health and performance based on Patrick Lencioni's Five Dysfunctions of a team. Specifically, this course focuses on understanding</p> | DCTO3 | 4 | \$600 |

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| <p>the other four levels of team dysfunction including Conflict, Commitment, Accountability, and Results.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Understand the other four dysfunctions of a team including Conflict, Commitment, Accountability, and Results • Develop strategies to improve a leadership team’s health to address deficiencies in the other four dysfunctions of a team <p>Course Evaluation: The successful completion of the selected Five Dysfunctions of a Team performance improvement exercise(s) for Conflict, Commitment, Accountability and Results.</p> | | | |
| <p>How to Be a Better Coach: The purpose of this course is to learn how to be a better coach and empower your team to achieve higher levels of performance. We will explore leading practices from championship teams and thought leaders such as L. David Marquet (“Leadership is Language”).</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Use language and change the conversation you have with team members to drive increased engagement, commitment, and performance from your team • Coach individuals on your team through the power of questions and laser focused listening • Leverage leading practices from championship sport teams that can be applied in a business context <p>Course Evaluation: The successful completion of role play exercise to demonstrate how to better communicate and coach team members.</p> | DCT04 | 4 | \$600 |

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| <p>Developing Your Budget and Forecast: The purpose of this course is to learn how to develop an annual budget and forecast to support the execution of the company's strategic and operational priorities. This includes learning how to complete scenario and sensitivity analysis to support financial decision making.</p> <p>This course includes four hours of one-on-one coaching to support the development of your company's budget and forecast.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Develop and improve the quality of your operating budget and forecast • Utilize your accounting system and historical financial results as a foundation to build your company's operational budget and forecast • Identify the key operational and financial metrics that have the greatest impact on your company's budget and forecast • Complete scenario and sensitivity analysis on your company's budget and forecast • Analyze and manage your budget on an ongoing basis <p>Course Evaluation: The successful completion and documentation of a 12-month operating budget and forecast.</p> | UYN01 | 8 | \$1200 |
| <p>Cash Flow Analysis and Strategies: The purpose of this course is to learn strategies on how to analyze, manage, and grow a company's cash flow. We will explore key cash flow metrics that should be tracked in every company to improve cash flow related to inventory, cash receipts, and payables. In addition, identify strategies in how to improve cash flow and understand the implications on your company's business and operating model.</p> | UYN02 | 4 | \$600 |

| Course | Course # | # of Hours | Cost Per Learner |
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| <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Analyze your company's cash flow by tracking and managing your cash conversion cycle by analyzing your company's Income Statement and Balance Sheet Develop strategies to improve cash flow and assess the implications of those strategies on your business and operating model Develop a simplistic cash flow forecast <p>Course Evaluation: The successful completion and analysis of the company's cash conversion cycle and documentation of improvement opportunities to improve a company's cash flow.</p> | | | |
| <p>Develop Your Company's Scoreboard: The purpose of this course is to learn how to identify and report on key performance indicators to track your company's strategic, financial, and operational performance.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Identify the leading and lagging performance indicators to track to monitor and manage company performance Set performance thresholds that drive interaction and intervention Develop an easy to understand scoreboard that can be used to communicate and track the company's strategic, financial, and operational performance <p>Course Evaluation: The successful completion and documentation of a scorecard that can be used to measure and manage a company's strategic, financial, and operational performance.</p> | UYN03 | 2 | \$300 |

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| <p>Competing on Customer and Employee Experience: The purpose of this course is to learn how a company can compete and win in the market by delighting their customers and employees.</p> <p>This course is delivered by the Stack'd XLAB.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Begin to compete on customer and employee experience • Link your brand promises to the experiences you are trying to create for your customers and employees • Use available data and information to influence and refine the experiences you are trying to create <p>Course Evaluation: The development and documentation of a brand promise that outlines the experiences that are trying to be created for the learner's company and identifying how this will be unique from a competitor offering.</p> | DYCE01 | 3 | \$450 |
| <p>Developing Personas and Empathy Maps: The purpose of this course is to learn how to develop Personas and Empathy Maps in support of your delighting your customers and employees. We will learn how to analyze and assess how customers and employees think, behave, and feel and how this influences how they want to engage with your company, their perceptions of their experiences with your company, and how you use this information to curate individualized experiences.</p> <p>This course is delivered by the Stack'd XLAB.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Select and develop a customer and employee persona • Empathize with your customers and employees to gain insights in what they want, what they care about, and how to delight them through creation of empathy maps | DYCE02 | 4 | \$600 |

| Course | Course # | # of Hours | Cost Per Learner |
|--|----------|------------|------------------|
| <ul style="list-style-type: none"> Use data to inform the development and evolution of your customer and employee personas and empathy maps <p>Course Evaluation: The development and documentation of a customer persona and empathy map for a given customer type based on actual customer data.</p> <p>Prerequisite: Completion of DYCE01</p> | | | |
| <p>Developing a Curated Customer Experience: The purpose of this course is to learn how to complete a customer journey map and identify where there are opportunities to improve the experiences your company provides both internally and externally. This course will provide you with the framework, tools, and approach to analyze and develop journey maps and a process to identify, evaluate, prioritize, and implement solutions to improve your company's experiences.</p> <p>This course is delivered by the Stack'd XLAB.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> Develop a customer journey map Use developed personas and empathy maps as an input into the development of your customer journey map Use customer and employee data to support the development and analysis of your customer journey map Identify the moments that matter that will have the greatest impact on an individual's experience with your company Ideate and evaluate potential solutions to improve a customer or employee experience <p>Course Evaluation: The development and documentation of a customer journey map for a given customer persona. In addition, the development of an implementation plan to support the developed solution to improve the customer experience.</p> | DYCE03 | 10 | \$1500 |

| Course | Course # | # of Hours | Cost Per Learner |
|--|----------|------------|------------------|
| Prerequisite: Completion of DYCE01, DYCE02 | | | |
| <p>Developing Scalable and Kick Ass Processes: The purpose of this course is to learn how to analyze, design, and implement scalable and repeatable processes to support the company's growth. In addition, how to build in lean best practices and continuous improvement to continually monitor and improve a company's processes.</p> <p>This course will involve in the learner documenting three key operational processes and assessing actual results to learn how to optimize them for continuous improvement.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Document operational processes using a swim lane process framework • Document standard operating procedures (SOPs) based on the developed process documentation • Analyze and operational process to identify areas of improvement and to reduce waste based on lean practices • Establishing performance measures to monitor and continuously improve a process <p>Course Evaluation: The successful documentation and implementation of three key operational processes. In addition, the identification of process improvements for each documented process based on actual performance data after the process has been implemented.</p> | DSKAP01 | 15 | \$2250 |
| <p>Better Team Execution: The purpose of this course is to learn leading practices in how to better execute your strategic and operational priorities by having better meetings, increased team communication, alignment, and accountability.</p> | UYTGSD01 | 6 | \$900 |

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|---|----------|------------|------------------|
| <p>This course will result in one-on-one coaching support to the learner in how to structure and lead execution meetings.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Use meetings to improve execution results through discipline, communication, alignment, and accountability • Develop agendas for your daily, weekly, monthly, and quarterly meetings • Improve your effectiveness in facilitating and leading team meetings based on in room observation <p>Course Evaluation: This course will be evaluated by in room observation of the successful leadership of the defined daily, weekly, monthly and quarterly meetings to drive improved team execution.</p> | | | |
| <p>Introduction to Operational Agility: The purpose of this course is to introduce how a company can build agility into its strategic planning practices, its' culture, and day-to-day execution.</p> <p>Learner Outcomes (How to):</p> <ul style="list-style-type: none"> • Rethink how your leadership team needs to lead, behave, and coach the team to be more agile • Build strategic tests into your strategic planning process to learn, fail, and create value for your customers • Leverage leading practices from IT Agile development and apply them to how your company is structured and executes on a day-to-day basis to increase execution velocity and customer responsiveness • Develop a pilot to implement agile practices in your company <p>Course Evaluation: The successful identification and documentation of strategic tests that can be completed on a quarterly basis that align with the overall strategic</p> | UYTGSD02 | 4 | \$600 |

| Course | Course # | # of Hours | Cost Per Learner |
|---|---------------|------------|------------------|
| direction of the company. In addition, the development of an implementation plan to implement agile practices at the learner's company. | | | |
| | Total* | 96 | \$14400 |

**Total cost per learner plus GST.*