



ConvergenceCoaching®
Helping leaders achieve success.™



The Transformational Leadership Program

2012-2013 Program Overview

The in-depth, year-long Transformational Leadership Program (TLP) is designed to help your future leaders honestly identify their strengths and areas for improvement and develop strategies and skills to drive performance improvements and prepare for meaningful roles in leading and managing your firm.

During the year-long program, each TLP participant will engage in:

TRIMESTER 1 | June 1, 2012 to September 30, 2012

- ⦿ **Completing an online self assessment** conducted at the beginning of the program, designed to uncover your self-perceptions and identify your true professional goals and desires
- ⦿ **Taking the Myers-Briggs personality assessment** to better understand your unique communication, decision-making, and teamwork preferences
- ⦿ **Comparing your self-assessment inputs with the assessment of your in-firm coach** to help focus on specific areas of strength and development
- ⦿ **Participating in a mandatory TLP Class participants' web seminar and roundtable** to discuss the Myers-Briggs assessment and explore ways to use the new insights gained to develop specific transformation goals to guide the program
- ⦿ **Completing the first mandatory self-study course entitled, "Managing Difficult Conversations Successfully"**
- ⦿ **Reading the ConvergenceCoaching e-book, "Straight Talk Your Way To Success"**
- ⦿ **Engaging in a joint coaching call** with a ConvergenceCoaching consultant and the in-firm coach to discuss and agree on your transformation goals
- ⦿ **Attending the first two-day, in-person workshop** entitled, "Learning to Truly Lead By Example," where we will:
 - Enhance your ability to manage change within your firm and your life by understanding the psychology and mechanics of change, how to adapt to continuous change yourself, and methods for moving others you're leading along the change adoption curve

- Identify the four dimensions of transformational leadership behaviors and the difference between transformational and transactional leadership
 - Learn a methodology to plan for success now and on an ongoing basis
 - Discuss methods for taking ownership of your clients, projects, and initiatives
 - Learn to effectively delegate when assigning ownership to others
 - Discuss different strategies for being accountable and holding others accountable
 - Identify your current conflict management style and the internal conversations you engage in that keep you from addressing problems you face
 - Practice two different methods for approaching difficult conversations
- ◎ **Identify a project to drive a changed behavior or new outcome** that will lead to the achievement of one of your specific transformation goals
 - ◎ **Engaging in a one-on-one coaching call** with a ConvergenceCoaching consultant to discuss insights from the workshop, specifics regarding how to approach your chosen project, and work through any roadblocks you may be encountering
 - ◎ **Accessing the Leadership and Communications Toolset** with 33 templates and tools and 17 articles in three distinct areas to aid in your project and guide your overall approach to transforming your leadership and communication
 - ◎ **Completing an optional self-study course entitled, “Managing the Art of Time Management”**
 - ◎ **Optionally participating in public ConvergenceCoaching web seminars** as offered on leadership, management, marketing, and personal development topics

TRIMESTER 2 | October 1, 2012 to January 31, 2013

- ◎ **Participating in a TLP Class participants’ web seminar and roundtable entitled, “Understanding Practice Economics”** to discuss the drivers of firm profitability and success
- ◎ **Completing the second mandatory self-study course entitled, “Enhancing Your Networking and Social Media Skills”**
- ◎ **Attending the second two-day, in-person workshop entitled, “Becoming a Great Business and People Developer”** where participants will:
 - Define the kind of marketer and business developer you are committed to be
 - Learn about personal marketing activities that build your personal brand and the firm’s brand including: **Networking and association involvement • Speaking and teaching • Article writing • Online social networking**



- Gain confidence in targeting specific prospects, outreaching to strangers, and asking for opportunities
- Discover how to develop long-lasting referral source relationships
- Identify how to develop and articulate the right unique selling or value proposition for each circumstance
- Track and report your personal marketing activities to monitor your progress and share your successes with others, too
- Identify one client or prospect opportunity you will approach as a result of this discussion and one commitment of a new behavior you will adopt

During the second half of this workshop, we will explore:

- Individual career motivators and how to appeal to them
 - Establishing performance expectations and individual goals
 - Methods for delivering transformative performance feedback
 - Different approaches to dealing with issues of competence and character
 - Ways to escalate performance issues and when to know it's not going to work
 - Innovative recruiting techniques and how to differentiate your firm from others in the hiring process
 - Identifying one team member you will approach with feedback as a result of this discussion and one commitment of a new behavior you will adopt
- ◎ **Engaging in a one-on-one coaching call** with a ConvergenceCoaching consultant to discuss insights from the workshop, specifics regarding how to approach the commitments from the workshop, the status of your program project, and work through any roadblocks you may be encountering
 - ◎ **Accessing the Marketing and HR Retention Toolsets** with 95 templates and tools and 18 articles to aid in your commitments and guide you in your efforts to develop important business and people development behaviors
 - ◎ **Engaging in a joint coaching call** with a ConvergenceCoaching consultant and your in-firm coach to discuss progress, roadblocks, and any changes or additions to your transformation goals and program project
 - ◎ **Optionally participating in public ConvergenceCoaching web seminars** as offered on leadership, management, marketing, and personal development topics



TRIMESTER 3 | February 1, 2013 to May 31, 2013

- ⊙ **Completing an optional self-study course entitled, "Maximizing Your Professional Image"**
- ⊙ **Participating in a TLP Class participants' web seminar and roundtable entitled, "How to Sell Your Ideas, Services, or Solutions"** to learn a six-step methodology for gaining buy-in to sell your ideas and/or engagements
- ⊙ **Engaging in a one-on-one coaching call** with a ConvergenceCoaching consultant to discuss project progress, discuss the status of workshop commitments and performance improvements, and develop a plan for developing business and meeting other objectives
- ⊙ **Engaging in a joint completion call** with a ConvergenceCoaching consultant and your in-firm coach to present your project outcomes, discuss performance improvements and results achieved, and establish plans for the next phase of your leadership development
- ⊙ **Optionally participating in public ConvergenceCoaching web seminars** as offered on leadership, management, marketing, and personal development topics

In total, participants have the potential to earn at least 33 hours in CPE and will gain access to a host of electronic articles, tools, and resources to help them implement the strategies they develop and keep the commitments they make.

The Results of Your Transformation

Upon completion of this program, participants are expected to:

- ⊙ **Develop an honest understanding of their talents and shortcomings and be able to openly discuss them with others**, directing their efforts toward areas of strength and working to improve their shortcomings
- ⊙ **Exhibit and model the behaviors of a leader and role model**
- ⊙ **Attain new levels of performance**, taking on additional responsibility and delivering more value to their team and the firm overall in the areas of leadership, strategy, people and project management, and business development
- ⊙ **Deliver specific results from their transformation project**

The ConvergenceCoaching 2012-2013 Transformational Leadership Program begins when you enroll, and you will receive instructions for the self-assessments, public web seminars, access to the toolsets, online self-study courses, and e-book immediately. TLP group activities, web seminars, and workshops begin June 1st. For more information, contact Tamera Loerzel at 952.226.1780 or tamera@convergencecoaching.com or visit www.convergencelearning.com to register today!

This program includes group-live, self-study, and web-based events and is an intermediate-level program where the prerequisite is that attendees be manager level or above. No prerequisites or advanced planning is required to attend. For more information regarding our refund, complaint, and program cancellation policies, please contact Krista Remer at krista@convergencecoaching.com.



ConvergenceCoaching, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.