

Suggested Approach:
Creating a Leadership Development Program for
Communication & Relationship Management Skills



Prepared Exclusively for
Southern Company Services IT - Application Services
As of July 3, 2015

The word cloud above was developed from words used in the Relationship Management section of your One IT Core Competencies. The size of the word reflects how often that word appears. It gives us clear insights about the focus that's being sought, and what we'll work to develop with you.

What's Inside

Based on your specific goals and our experience coaching and developing highly technical leaders and teams at companies such as Microsoft and Hewlett-Packard, we've developed a behavior-based, interactive leadership development program. It's targeted to accelerate the communication and relationship management competencies of your leadership team, as you've defined in the One IT Core Competencies. Plus, we've outlined how the concepts taught to your leaders will translate across your team—helping them truly create long-term cultural change.

For a brief overview of this proposal, we've made you a video at <http://redcaperevolution.com/private-message-for-scs-as/>

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1. Reviewing Your Goals

As part of our process, we'll review these goals thoroughly with you to make sure we're targeting the right behavioral changes.

To date, you've shared the following:

- You've been building your leadership competencies, and communication consistently comes across as an area you need—and want—to develop.
- When your people talk about "communication," they really mean building stronger, more productive relationships by understanding how to think differently, share differently and listen differently to internal customers and teammates.
 - Your team is heavy with technical experts, and you need tools to learn how to share your expertise without being overwhelming—or getting overwhelmed!



2. The Results You Want

Based on the goals we confirm with you, we'll create clear success measures AND a tool to use in one, three, and six month increments to evaluate the ROI of this training effort.

At present, you've shared that these are the results you want:

- You want to see an observable improvement in your relationships and results with your business partners. That means:
 - Fewer conflicts;
 - Better understanding of how your work fits in context of the business;
 - Consistent, positive feedback that your team creates results.
- You want to be able to:
 - Confidently communicate your value;
 - Get out of the weeds and collaborate with your business partners on bigger picture business strategies; and
 - Be seen as a trusted advisor and internal consultant, not an administrative barrier or technical hurdle.



3. Leadership Program Outline

We've all been there. Your company asks you to attend training. You multi-task through it. Then you go back to work and never remember what you've learned. No behavior change. No ROI.

That's why we've outlined not just "training," but a specific program with strategic actions before and after your leadership event. This design has worked with many of our clients to ensure that new behaviors are well understood, applied, and maintained in our busy, real world of work.

Our proposed program has three parts:

- a. Advance work, which includes a Communication Styles Inventory, our Customer Insights Inventorysm, and an optional set of customer/business partner interviews;
- b. A Leadership Workshop, tentatively scheduled for September 9, 2015
 - *We've noted this in the Timing section, but to deliver a September 9 workshop, we'll need approval to move forward no later than July 24. Earlier is always better!*
- c. Follow-up Communication and Measurement



3A. Advance Work

We'll invite all participants to complete two things before attending the workshop: a Communication Styles Inventory, and a Customer Insights Inventorysm.

About the Communication Styles Inventory

After testing many different tools and techniques, we've found the "What's My Communication Style?" inventory from HRDQ to be the simplest to understand and use ongoing. Here's how it works:

- Each participant receives a link to a 10-minute online assessment.
- They'll receive the snapshot of their own communication style, as it falls on the matrix pictured here.

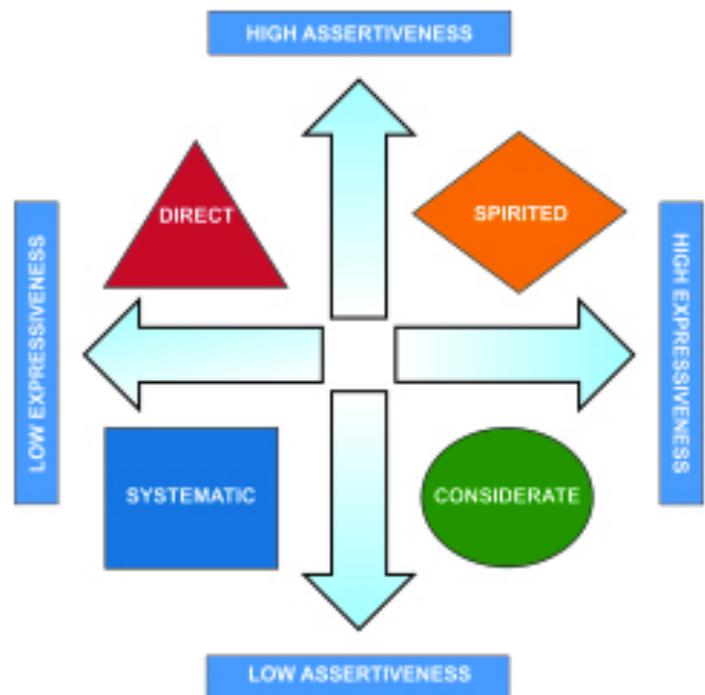
As part of the workshop content, we'll deepen the understanding of individuals' own styles AND provide tools and techniques to identify others' styles to be able to communicate more effectively.

For example:

- *If your style is Systematic,*
- *And your business partner is Spirited;*
- *We'll identify why conflicts arise, and what you need to consider to adjust your communication and reach them in the way they listen and learn best.*

No one style is "better" than the other—the goal is to recognize differences and adjust accordingly for better results.

Optional: Many leadership teams we've worked with have benefited from a custom chart plotting where each of the team members fall across the four styles. As we finalize our plans, we can discuss if this would be helpful.



About the Customer Insights Inventorysm

The Customer Insights Inventorysm is a proprietary tool developed by Red Cape Revolution to help client and customer-facing leaders review and evaluate their own relationships and success working with others.

It's intended as a self-assessment, although many clients have used the tool as a starting point for broader discussions with their own customers and teams.

After creating a clear picture of the current relationship with an individual, the Inventory includes questions such as:

- *On a scale of 1-5, how much do I trust this person to always do the right thing where I am concerned?*
- *On a scale of 1-5, how trustworthy have I been in our past interactions?*
- *How important is it to my overall success that this person has confidence in me?*
- *How much time am I investing in preparing for conversations or meetings with this person?*
 - *Based on how important this person is to my success, is that too much or too little time?*



Unlike the Communication Styles Inventory, the Customer Insights Inventorysm is completely confidential. While it will be discussed in the workshop, each leader can keep their findings private.

Once a leader is introduced to this tool, they also can use it ongoing for continued relationship management planning. It continues to add value long past the in-person leadership workshop.

Optional: Business Partner Interviews

Based on what you've shared so far, the biggest impact of your leadership development will be measured through the eyes of your business partners and how they feel your leaders are contributing to the business success.

So it may make sense at this initial stage to engage them in the leadership development process.

As an optional activity prior to the leadership workshop, we would conduct two to three confidential interviews with key business partners that you identify.

These interviews typically provide more in-depth, strategic insight about the behaviors that are currently being observed and the ones that are desired.



We would then incorporate those findings into case studies and communication exercises in the leadership workshop, allowing for a more targeted, real-world experience.

3B. Leadership Workshop

Based on what you've shared so far, here's a proposed outline for the in-person segment of our leadership development program.

We've designed a plan that involves interactive team components, designed to keep people moving, talking, and engaged, yet make the most of our time together.

What It's Called

Often, the title of the workshop becomes an important tool to clarify expectations and get people engaged.

Our initial suggestions for this day include:

- Leadership Forum: Communication, Trust & Changing the Game in IT
- Connect, Communicate & Influence
- From Expert to Influencer: Building One IT by Building Relationships

As we work together to confirm your goals and content, we'll confirm an engaging title that gives your leaders clarity about what to expect—and what's expected of them.



Outline of the Day

We'll develop more specific timing—including breaks—as we confirm content with you.

Section	Key Content	Time
Welcome and Why We're Here	What to expect from today – and after today What's needed from you today	20-30 min
Understanding the Opportunity	<p><i>This section may be best facilitated in partnership with one of your leaders who can tell real stories about why it's important to build better relationships and create more influence now. If we conduct the optional business partner interviews, we'll share specific examples from that research.</i></p> <p><i>Alternatively, you can invite a key business partner to attend and share his or her experiences.</i></p> <ul style="list-style-type: none"> • Getting on the same page: what's the problem we're trying to solve with One IT? • Group exercise: What our customers say now, and what we want them to say in the future • Table exercise: What's getting in the way? • Reviewing the Customer Insight Inventory • Pairs activity: What I learned from my Customer insight inventory • Debrief, Q&A 	90 min-1.5 hours
Understanding Ourselves	<p>Why our communication style matters—how it helps, and how it gets in our way.</p> <ul style="list-style-type: none"> • Team exercise: What's Your Communication Style? • Pairs activity: Identifying Others' Styles • Team exercise: Flexing to Others' Styles • Debrief, Q&A 	1.5-2 hours
Building Your Relationship Management Plan	<p>Hands-on action planning to create and practice specific conversations and requests. Includes practicing consulting and influencing each other through questions such as:</p> <ul style="list-style-type: none"> • What's my ideal result? • What's already working? • How can we be ourselves and still get the results we want? • What support do we need? 	1.5-2 hours
Q&A & Closing Thoughts	<p><i>We'll use this time not only to close out any questions, but to start the leaders thinking about how they can use these tools and ideas with their teams. This helps ensure commitment and success for the broader staff training to follow.</i></p>	40 min – 1 hour

3C. Follow-up Communication & Measurement

Our work can't stop with delivering an engaging, successful leadership workshop. We recommend building in the communication and measurement plan as part of the overall event. That way it doesn't get lost in the energy (and sometimes, exhaustion) of holding the in-person event.

SCS=Southern Company (leader)

RCR=Red Cape Revolution (directly from workshop leader Darcy Eikenberg)

<i>Communication</i>	<i>Delivered from</i>	<i>Delivered on</i>
Thank you and idea reinforcement email	SCS lead	Day after event
Feedback and key learnings survey (confidential)	RCR	Day after event
Personal "thank you" phone call/visit to any participants who made a significant contribution to the workshop	SCS lead	Within week after event
One-month reminder and call for success stories & questions	RCR	1 month after event
Three-month reminder call for success stories & questions	RCR	3 months after event
Six-month reminder and call for success stories & questions <ul style="list-style-type: none"> • Invitation to revisit Customer Insights Inventorysm to identify changes 	RCR	6 months after event

4. Team Workshop Process

You'd like to continue the conversation and the learning with the rest of your team. Our half-day workshop would be customized based on the successes and learnings gained from the leadership workshop, but here's a high-level outline of what it might contain. We recommend extending the Communication Styles Inventory as prework for this group, too.

Section	Key Content	Time
Welcome and Why We're Here	<p>What to expect from today – and after today</p> <p>What's needed from you today</p> <p>Rapid-fire introductions if all don't know one another</p>	15-20 min
Understanding the Opportunity	<p><i>This section may be best facilitated in partnership with one of your leaders who can tell real stories about why it's important to build better relationships and create more influence now.</i></p> <p><i>As before, you can invite a key business partner to attend and share his or her experiences.</i></p> <ul style="list-style-type: none"> • Getting on the same page: what's the problem we're trying to solve with One IT? • Group exercise: What our customers say now, and what we want them to say in the future • Table exercise: What's getting in the way? • Debrief, Q&A 	45 min-1 hour
Understanding Ourselves	<p>Why our communication style matters—how it helps, and how it gets in our way.</p> <ul style="list-style-type: none"> • Team exercise: What's Your Communication Style? • Pairs activity: Identifying Others' Styles • Team exercise: Flexing to Others' Styles • Debrief, Q&A 	45 min-1 hour
Building Your Action Plan	<p>Hands-on action planning to create and practice specific conversations and requests. Includes practicing consulting and influencing each other</p> <ul style="list-style-type: none"> • What's my ideal result? • What's already working? • How can we be ourselves and still get the results we want? • What support do we need? 	45 min-1 hour
Q&A & Closing Thoughts	<p>Questions, open issues, and next steps.</p>	15 min

5. Proposed Timeline

This is a high-level timeline of the key actions to ensure we can deliver a successful event on September 9, 2015 and put plans in place for employee workshops to follow. When we begin work together, we'll review and refine.

In order to successfully partner to create a successful September 9th event, we need to have your approval no later than July 24. If those dates change, we'll adjust the timeline accordingly.

Action	Responsible	By When
Confirm intent to work with Red Cape Revolution	SCS	July 24, 2015 or earlier
Review overall plan to confirm dates and deliverables, roles & responsibilities, and approval processes	SCS & RCR	Week of July 27 or earlier
Complete contracting based on deliverables	SCS & RCR	Week of August 3 or earlier
Distribute Communication Styles Inventory to participants	RCR	Week of August 3
Distribute Client Insights Inventory to participants	RCR	Week of August 3
If included, business partner interviews held	RCR	Week of August 10
Content customization and finalization of all handouts, visuals, and meeting tools	RCR	Weeks of August 10-17
Confirm schedules for employee workshops in October and send "hold the date" notices	SCS	Week of August 17
Content flow locked down (no further changes)	RCR	August 21
Employee workshop project planning complete, including dates and deliverables		Week of August 24
Develop follow-up communication and feedback mechanism	RCR	Week of August 24
In-person, onsite review of the day with key leadership team (if desired)	SCS & RCR	September 8
Deliver successful leadership event and have fun!	SCS & RCR	September 9
Send post-meeting feedback tool	RCR	September 10
Review results & adjust plans as needed for employee workshops	SCS & RCR	Week of September 14
Preparation and project management for employee workshops	RCR	September 14-30
Send one-month follow-up to leader team	RCR	Oct. 9
Deliver employee workshops	SCS & RCR	Throughout October
Send three-month follow-up to leader team	RCR	December 2015
Send six-month follow-up to leader team	RCR	March 2016

6. Investment

Time

We've worked with enough busy, successful leaders to know that your time is limited, and valuable.

That's why we include time—your time—as an investment to consider. We can do a majority of the hard work to make your program come to life, but it's inevitable that you will need to identify the following resources to ensure success:



Role	Time to budget
<p>Lead decision maker</p> <p><i>In our experience, decision-making by committee isn't the most effective strategy.. If you are committed to delivering the leadership day on September 9, we recommend clarifying your lead decision maker now. This person would be our final point of contact for all approvals and strategic questions.</i></p> <p><i>We can work with your identified leader to clarify what other processes she/he may need to put into place to keep stakeholders in the loop.</i></p>	<p>2 hours/week during weeks 1 and 2</p> <p>1 hour/week leading up to leadership event and for 2 weeks after</p>
<p>Administrative resource</p> <p><i>We'll need "inside support" with access to your company systems for scheduling, logistics management and assistance with email communication with your leaders.</i></p>	<p>1 hour/week during weeks 1 & 2</p> <p>1.5-2 hours/week leading up to leadership event</p>

These time estimates are averages based on our experience with large organizations like yours. We've found it better to plan more time and happily discover it's not needed than to not have enough time to get everything done well.

Money

The financial investment to help you build great communication and relationship management skills through this comprehensive leadership development program is \$69,500.

That investment includes:

- All necessary proprietary tools and related intellectual property of Red Cape Revolution
- All project planning and management
- All preparation, including conference calls and meetings
- All communication and measurement strategy and planning as outlined
- Creation and customization of leader workshop. Includes:
 - Communication Styles Inventory, including third-party administration costs
 - Client Insights Inventorysm
 - All handouts, resource sheets and presentation tools
 - On-site teaching and facilitation (full day onsite preparation and full day onsite delivery at your location)
- Creation and customization of employee workshop. Includes:
 - Communication Styles Inventory, including third-party administration costs
 - All handouts, resource sheets and presentation tools
 - On-site teaching and facilitation (half day)
 - Estimated at 5-6 separate workshops in Atlanta or Birmingham
- All related consulting, coaching and troubleshooting with project team leaders to ensure great results.

In addition, we charge travel expenses including airfare, hotel and transportation if needed, and we strive to keep these at a minimum at all times.

We ask for a third of fees to be paid upon a signed agreement confirming our work, a third to be paid on or before the day of the event, and the remainder within two weeks of the conclusion of the project. We're also happy to accept a corporate credit card in smaller payments more frequently, if it simplifies tracking and payment processes on your end.

We're already an approved, registered, insured vendor in your systems and qualify as a Woman-Owned Business. So we can begin immediately!

7. Why Red Cape Revolution?

Remember when you were a kid, and you wrapped a towel around your shoulders? Remember how it made you feel? You felt clear, confident, and in control.

Plus, it was fun!

What if we could get those feelings back every day at work? What would change in our companies, our communities, and even our world then?

We believe it's time for you to wear your red cape at work once again. Our executive coaching and leadership development programs help today's leaders learn how to inspire and motivate their teams in real-world ways that work for their organizations and themselves.

We take a practical, hands-on approach to learning that reflects the honest pressures, challenges, and opportunities of our world of work today. Our students have a great time in our energetic, interactive sessions, but they also walk away with a deeper understanding of the ideas shared—and how they can put them to work for their career and success.

Our worldwide client list includes top tier companies such as Microsoft, HP, The Coca-Cola Company, and State Farm. More than 90% of our opportunities come by word-of-mouth referral (as this one did), so we're proud to create the trust and the results that these companies value enough to share with others.



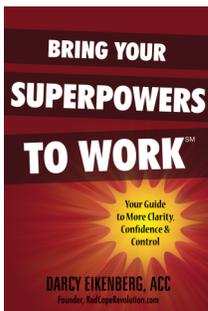
About Darcy Eikenberg, PCC

Executive Coach, Leadership Speaker & Founder of Red Cape Revolution

Darcy Eikenberg, PCC, helps high performance professionals accelerate their leadership in ways that work for their organizations and for their careers. With a practical, real-life perspective, and with over 20 years' experience working with top companies including The Home Depot, Microsoft, Deloitte, and Ace Hardware, Darcy's clients consistently grow to greater levels of clarity, confidence and control in their work and lives—all leading to better business results.



Previously, Darcy was a Principal at human resources consulting firm Hewitt Associates (now Aon Hewitt), where she served on both the Southeast and the North American Consulting Leadership teams. In those roles, she was accountable for developing and retaining talent, building managers and teams, and growing a healthy bottom-line. She also designed and led a national managers' forum to share best practices and extend front-line learning, and created an internal coaching program targeted to high potential associates and high revenue teams managing complex customer relationships.



Her book, ***Bring Your Superpowers to Work: Your Guide to More Clarity, Confidence and Control*** is available everywhere. She's been quoted in the *Harvard Business Review*, CNN.com, *Atlanta Journal-Constitution*, *Modesto Bee*, and CareerBuilder.com among others.

Darcy is one of fewer than 2000 people in the US to earn the International Coach Federation's (ICF) Professional Certified Coach (PCC) credential, representing over 750 documented client coaching hours and more than 125 hours of coach-specific training. She's a past president of ICF's Georgia chapter, and graduated from Northwestern University.

Read over 35 public recommendations on Darcy's LinkedIn profile at www.Linkedin.com/in/DarcyEikenberg

Watch video examples of Darcy's teaching style at www.RedCapeRevolution.com/darcy-speaks/ and www.youtube.com/RedCapeRev

8. Next Steps

Based on our experience, here are immediate next steps and suggested timing:

Suggested approach submitted by Red Cape Revolution	July 3
Southern Company reviews; asks clarifying questions or requests further information	Week of July 6
Southern Company confirms decision to partner with Red Cape Revolution	No later than July 24 to ensure September 9 event. Earlier is welcome!
Southern Company and Red Cape Revolution team hold getting started session to review overall plan, confirm dates & deliverables, roles & responsibilities, and approval process	Week of July 27 or earlier

As a reminder, watch my video overview of this proposal at <http://redcaperevolution.com/private-message-for-scs-as/>

We thank you for the opportunity to provide these ideas to you. We hope they paint a picture about how we'll partner with you to ensure your leadership development program helps you bring One IT to life, creating behavior change that gets you and your business partners the results you need.