



**P-Cubed Partners**  
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## Summary of Leadership, Management Training and Development Scope of Work with a Recent Client in the Public Sector

**Understanding.** P-Cubed understands the following about this engagement on behalf of Client

- The Chief Operations Officer wishes to undertake Leadership and Management Training for the Client Division to upgrade the division personnel's skills and prospects for advancement;
- Training is intended to touch four (4) current Executive Directors, ten (10) current Directors and two (2) current Managers
- Session will be both general for the larger group combined, on-on-one sessions with individuals and tailored training for individuals as needs are identified;
- The work period will be between May 15, 2016 and August 15, 2016;
- P-Cubed Chief Collaborator, Phillip Infelise, will personally execute all of the work;
- P-Cubed will report directly to the COO.

### Proposed Scope of Work.

**Phase One - Discovery Phase.** During the Discovery Phase, P-Cubed will review any/all documents provided for background, work with the Chief Operating Office to develop goals and objectives and preview the potential trainings that may result from the Discovery Phase and subsequent Individual Discovery Phases. Activities during this phase will include:

- Meet with Chief Operations Officer and discuss/determine specific goals and objectives that will influence the specific trainings and exercises in subsequent phases of work;
- Review two most recent annual or periodic staff reviews on each of the sixteen (16) staff in the Division (a seventeenth is currently vacant but could be included);
- Discuss COO specific recommendations for individual needs for each of the staff reports –where are their gaps that we want to fill.
- Meet with each of the four direct reports and review the individual needs in their departments for confirmation and/or modification
- For rediscovery, loop back to the COO periodically with feedback from subsequent phases to assess progress, anomalies, proposed changes in scope or direction



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**Phase Two - Individual Discovery Phase.** During the Individual Discover Phase, P-Cubed will work with each individual to self-assess their leadership and management needs and cross connect with their management to determine a common assessment. Activities during this phase will include:

- Meet with each of the four (4) current direct reports – and work them through developing a SWOT on themselves (Strengths, Weaknesses, Opportunities, Threats) Note: For the purpose of modifying the typical SWOT from an organization to an individual we suggest that “Threats” becomes “Turnabouts” or those things that we will work together to improve upon so that growth opportunities become realities;
- Review results of these with the COO and discuss adding/modifying as appropriate;
- Likewise meet with each of the direct reports and work them through developing a SWOT on each of their staff, presumably eleven (11) total;
- Subsequently, meet with each of the staff under the direct reports and work with them to develop their individual SWOTs;
- Return to direct reports and review their staff SWOTs with them and determine if any changes should be made based on specific objectives of the direct reports for their staff.

**Phase Three - Group Leadership and Management Training Phase.** Clearly, these group trainings are merely three options to be discussed and may or may not modify once we review a collective of all of the SWOTs as they may reveal a greater need for something different or more specific. However, until that time, let’s assume three major group trainings for all or a portion of the whole division. Each of these sessions will entail a half day of focus - a two hour “presentation,” a one-hour small group session and a 30 minute re-cap session.

**Session One.** “Communication – Opening the Keys to Collaboration.” This session will focus on improving all participant’s verbal and written communication skills in a variety of applications, both formal and informal and at various levels therein. Likely schedule – second week of June.

**Session Two.** “The Leadership Ladder - -Managing Up and Managing Down.” Two very different challenges and approaches; some similar skills are used in either direction, while other require unique techniques that are often diametrically opposed depending on the circumstances. Likely schedule – first week of July.



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**Session Three.** “Multi-Dimensional Approach to the Multi-Generational Workplace.” We need to face an emerging workplace that now spans from Baby-Boomers thru Xers to Millennials and the techniques to motivate and encourage each generation are vastly different. We will explore the nuance of each generation (hopefully some of each in the room) and the variety of technique applicable to inspire them. Feedback during these sessions should be interesting, as the same generations we are addressing will be interacting together. Likely Schedule – third week of July

Each session will use a quick electronic feedback format that will help extract the issues to be addressed in the final phase.

**Phase Four - Individual Actualization Phase.** This last phase is customizable and, as such most difficult to define until; the first three phases are completed. However, we can assume that some or all of these issues (and others previously unsurfaced) will be addressed with some or all of the individuals. Assuming two hours of follow-up discussion with each, discussion may include the following:

- Review discussions with COO about which issues remain to be addressed with his Executive Directors in their individual session to follow;
- Review discussions with Executive Directors about which issues should be addressed with Directors and Managers in their individual sessions to follow;
- With individual Executive Directors, Directors, Managers, review their SWOT from Phase Two and determine which, if any, issues remain unaddressed after sessions and discussion in Phase Three;
- As issues remain, discussions will ensue to try to remedy that omission and if there is a common need among more than a few, a group session may be developed on that issue or subject area;
- Individualized SWOTs with revised Opportunities and Turnaround targets will be provided to each individual for their personal use.

These session will likely be scheduled during the first two weeks of August.

**Optional.** Optional services are available, but not included in this Scope of Work or the professional fee schedule presented. The COO may request and authorize follow-up sessions with individuals at sixty (60) days or one hundred and twenty (120) days hence.

Presumably, these would all be individual session only at billed on an hourly basis.