



Certified Transformative Advisor Program

Management Advisory

Syllabus

Section One - Section One - Foundations and Level Setting

- The Nature of the Work
 - What is Management Advisory?
 - Incorporating Management Coaching into your Advisory Engagements
- Client Identification and Recruitment – Ideal Client for Management Advisory

Section Two – Advising the Senior Leadership Team

- Alignment Begins at the Top
 - Vision, Mission, Purpose defined
 - Leadership Assessments – Personalities, Saboteurs, DISC
- Brand and Culture
- Servant Leadership

Section Three – Advising the Organization

- Building the Org Chart: Mapping Roles and Responsibilities within the Organization
- Hiring Strategies
- 5 Keys to Dynamic, High-Performance Teams
- Building an Objective-Minded, Accountability-Driven Organization
 - Brainstorming and Innovation Processes
 - Goal Setting
 - Measurements (e.g., KPIs and OKRs)
 - Review Cycles (e.g., AAR)
- Meeting Strategies

Section Four – Building and Nurturing Company Culture

- Vision, Mission, Purpose throughout the organization
- 4 Key Value Types
- SWOT Analysis

Section Five – Managing Teams: Execution, Scale and Accountability

- Steps in the Review and Advisory Cycle
- Understanding How to Drive Value
- Putting it All together in a Monthly Engagement
- Roadmap to Client Application