



Executive Level

Development

Series



Associated Employers

Billings | Helena | Missoula

406.248.6178

www.associatedemployers.org

Welcome to the

Executive Level Development Series

Focusing exclusively on leadership education and research, the Executive Level Development Series offers expertise in solving the leadership challenges of individuals and organizations. Presented by Associated Employers (AE), the Executive Level Development Series helps executives and business owners develop and maintain practical leadership skills through an array of programs, products, and other services.





The Executive Level Development Series provides unparalleled expertise in educating individuals in this region to develop their leadership potential and to drive success in their organizations.



Benefits of Program

With years of experience and a unique developmental approach that consistently produces positive results, the program provides:

- A singular focus on leadership.
- Networking opportunities to learn from other leaders from a variety of market segments.
- Programs built on a research-based foundation of assessment and feedback.
- The completion of multiple assessment tools providing you the necessary feedback from your subordinates, peers, and supervisors to understand how you and your work style is perceived and how it can affect others.
- Personal attention tailored to your needs.
- A safe and supportive learning environment.
- Experienced faculty and instructors with expansive academic credentials and business experience including large corporations, government, education, and non-profits, who understand the real world leadership challenges you face.
- Balance of theory and application achieved through a combination of assessment tools, group discussions and simulation-based exercises with peer feedback which provides valuable insights into individual leadership skills and business operations.

**Jerry Begger,
President,
WestFeeds, LLC**

"I have attended the Program for Applied Leadership Executive Development program that Associated Employers put on in Billings. I found it to be a great course to help understand the challenge of personnel management and how to deal with different personalities as well as how I'm viewed by employees. I also liked the fact we were assigned a mentor to help through not only day to day tasks, but someone to call when the class was over to bounce ideas off of. This class has helped with my out of the box thinking as well as writing a great business plan. It also opened my eyes up to how other companies handle similar situations. I would strongly recommend this class to anyone running a business with employees."

AE TALENT

Business & Management Development



**Bryan Peterson, PHR, Vice President,
Eastern Region**

Bryan joined Associated Employers in the fall of 2007 and provides member services in the areas of staff development and training. In doing so, he provides classroom and customized onsite training to member businesses. Bryan also provides member consultation services in the areas of organizational development and management training issues.

Prior to joining Associated Employers, Bryan has worked in the financial institution industry and for a Fortune 500 company. Responsibilities included managing teams up to 150 employees, master training for district-wide staff development, and district executive recruiting. Bryan has a B.S. degree in Business Administration from North Dakota State University, and his Professional in Human Resources (PHR) certification. He is a member of the Society for Human Resource Management (SHRM) on the local and national level.



Jackie Swiesz, HR Business Partner

As an HR Business Partner, Jackie Swiesz assists AE members with Human Resource needs through responding to hotline calls; conducting HR Needs Assessments; reviewing, developing and implementing Employee Handbooks; performing on-site HR services through AE's HR Partnering program; conducting training; assisting members with recruiting; and, developing policies and programs including wellness

programs.

Jackie has over ten years of human resource experience in both the private and non-profit sectors at businesses in Montana and Idaho. In her HR role, she has served as a key management person and partnered with business owners, boards of directors, and supervisors to provide leadership and collaboration from strategic planning to daily operations. She is experienced in a full range of HR functions as well as payroll and benefits, safety accreditation, and employee training. She is well acquainted with the diversity of small businesses in our area. Her HR experience ranges from wholesale distributors to electrical energy cooperatives and other non-profits in the social services and educational sectors.

Jackie holds a Bachelor of Science degree with a concentration in business communication and HR management from MSU-Billings. She is an active member of the local and national chapters of the Society of Human Resources Management (SHRM).

AE TALENT

Business & Management Development



Sandra Villegas, SPHR, HR Business Partner

Sandra Villegas joined Associated Employers in 2012 with over 20 years of Human Resource experience. She assists members in all areas of HR, including employee performance and conflict management, compliance, handbook and policy development, Affirmative Action Plan preparation and audit assistance, HR Assessments, on-site HR projects and services, compensation, surveys, and training.

Prior to joining Associated Employers, Sandra held HR Management positions in the retail and banking industries, and was the Director of HR for a privately held distribution company. She then moved to an HR Consulting role with a large Employer's Association in Washington, and in that capacity she worked with a wide variety of organizations, primarily in the areas of employee relations, harassment and discrimination prevention, compliance, Affirmative Action, HR administration, on-site HR projects and services, and training.

Sandra has a B.S. degree in Business Administration from Oregon State University, and her Senior Professional in Human Resources (SPHR) certification. She is a member of the Society for Human Resource Management (SHRM) on the local and national level.

Meet the Instructors

ATTORNEY AT LAW



Eric E. Nord
Crist, Krogh & Nord LLC
Attorneys at Law

Eric Nord works for the Crist, Krogh & Nord law firm in Billings specializing his practice in the area of business law and litigation with a special emphasis on commercial transactions, employment law, real estate, construction law, and corporate relations. He also acts as a mediator in business matters.

Mr. Nord is a 1988 graduate of Boston University Law School and a 1985 graduate of Carleton College. He is a member of Montana's Professionalism Committee and the chairperson of the Judicial Relations Committee. He has written articles and presented seminars on a variety of business-related topics.

Mr. Nord is also an online instructor of business law at for the University of Phoenix and MSU-Billings. He is also Treasurer of the Yellowstone Area Bar Association, President of the Billings Education Foundation, President of the Billings Depot, and an officer and member of other non-profit boards.

ACCOUNTANT



Michael D. Morrison, CPA,
Morrison CPA P.C.

Michael Morrison works for Morrison CPA P.C. in Billings as a CPA. He provides numerous business consulting services including: QuickBooks setup and training, point-of-sale systems implementation, employee training and development, business advisory and management coaching, budget development and cash flow management, compiled and reviewed financial statement preparation, and tax planning and preparation for individuals and businesses.

His broad background includes experiences in numerous industries in multiple states. He is also an adjunct accounting instructor at MSU-Billings, a CPA resource for Big Sky EDA and the SBDC and is a QuickBooks ProAdvisor.

Michael earned a B.S. in Accounting from Montana State University and an MBA from the University of Montana.

Executive Development Program Agenda

Phase I: Pre-Work

The program begins with assessment. Research and recent statistics within the business world have shown that 85% of a Leader's success will come from their ability to enhance their own Emotional Intelligence, while only 15% will come from Education and Experience. Command and Control is no longer the sole tool in the Executive's tool box. The process is seamless for the participant. Participants will receive links to these assessments, along with a welcome letter and registration packet 30-45 days in advance of the program session.

DiSC Classic 2.0 Plus: Combining the insight of personalized narrative with the power of focused reports, DiSC® Classic 2.0 Plus gives respondents a strong base from which to learn more about their behavioral preferences.

Everything DiSC 363 for Leaders: Combines the best of 360° feedback with the simplicity and power of DiSC®, plus three strategies for improving leadership effectiveness. The result is a 360° experience that's more productive and satisfying.

Using CommentSmart, our exclusive selectable comments feature, raters choose from pre-written, highly-tested comments, giving feedback that's focused, balanced and constructive. Clear visuals and a conversational narrative style make the profile easier to use and understand. Plus, leaders get their next steps with the three things they can focus on now for improving leadership effectiveness.

Everything DiSC 363 for Leaders is meant for anyone who wants to use 360° feedback as part of their leadership development, whether they're an emerging high-potential leader or an experienced executive.

Case Study Assessment: Participants will be asked to develop and contribute two separate case studies utilizing a template from specific management experiences in the following areas:

- Managing your own behavior
- Motivating your senior team
- Conflict - resolved or unresolved
- Coaching - successful or unsuccessful
- Team interaction - successful or unsuccessful
- Operational Concerns

Organizational Strategies: Utilizing strategic planning worksheets, the participants will assemble ideas and concepts around needed strategies and objectives for market growth and product and service development and delivery to the organization's stakeholders and customer base.

Executive Development Program Agenda

Phase II: Workshop Session I

This three day workshop is designed to provide the participants with “Best Practices” in Leadership skill sets. Throughout the workshop, the feedback from the DiSC and the 360 Degree feedback tool are utilized to drive home the importance of the “Best Practices.” We begin with the participant understanding, in great depth, their own behaviors, why they act the way they do, and how those behaviors and subsequent actions are a benefit and a detriment. The workshop concludes with concrete tools and resources for change.

<u>Day One</u>	
Time	Description
4.0 Hours	<p>Leader – Personal Development</p> <ul style="list-style-type: none"> • <u>Emotional Intelligence utilizing DiSC</u> - What makes someone a top performer at work? If you think IQ, advanced degrees, analytical skills, and technical expertise are the answer, it's time to think again. Experts now agree that Emotional Intelligence often determines who will climb the corporate ladder and who will be passed over. New research shows that unlike IQ, Emotional Intelligence can be developed and increased at any point in a career. • <u>DiSC - Understanding Dimensions of Behavior</u>- We will review the dimensions of behavior specific to DiSC and relate them to personal experiences by the instructor, as well as the management team. We will look closely at each participant's profile and classical pattern and discuss how each can and should relate to others on the team that has differences. Discussion will also revolve around the strengths each dimension offers. • <u>Communication</u> - This program covers most areas of communication, beginning with a general understanding of your audience based on the DiSC concept. Since listening is 55% of the way we communicate, and an area we do not perform well at, the area of active listening is a major concentration. <ul style="list-style-type: none"> - Experiential Activities: Listening exercise; verbal and non-verbal communication exercises
2.0 Hours	<p>Leader – Developing Your Management Team</p> <ul style="list-style-type: none"> • <u>Managing Conflict</u> - Conflict not only makes the workplace uncomfortable, it hurts productivity, increases turnover and affects the bottom line. But many fear and avoid conflict situations, because they do not know how to deal with them. When performance problems and inappropriate behaviors are ignored, they do not go away. The problems turn into bigger problems. We will help participants understand conflict and how to manage it for positive outcomes.
2.0 Hours	<p>Strategic Thinking & Personal Development</p> <ul style="list-style-type: none"> • <u>Personal Analysis</u> - Participants will begin personal analysis of their DiSC Personality Profile results and 363 results.

Day Two

Time	Description
4.0 Hours	<p>Business Law/Business Ethics</p> <ul style="list-style-type: none">• Montana has a one-of-a-kind Wrongful Discharge from Employment Act. No matter what the size of your business, this Act governs your employment relationships. Therefore, it is important for employers to know the process and procedures of this Act. Specifically, employers need to know when an employee's probationary period ends and how it affects termination of the employee. Employers also need to know the definition of "good cause" as well as the due process rights and responsibilities that the Act codifies. Lastly, employers need to know how to apply ethical business practices when managing their legal risks under the Act. These ethical business practices go beyond understanding and applying the Act's legal framework; ethical management practices must dovetail with the intents and purposes of the Act's requirements. As a recent Montana Supreme Court decision has shown, management's attempts to dance around the spirit of the law will not be condoned.
4.0 Hours	<p>Financial Analysis</p> <ul style="list-style-type: none">• Executives can often be isolated from the true meaning and understanding of their organization's financial well-being as a result of reliance upon their CFO or contract accountant. Topics to be explored include financial statement basics, the process, payroll issues, cash flow, analysis, tax issues and planning, choice of entity, and financial goals. All Executives will benefit from understanding what they need to be reviewing and how often, in order to be more conversant about their organization's financial well-being.



Day Three

Time	Description
2.0 Hours	Strategic Thinking - Personal and Professional Development <ul style="list-style-type: none">• <u>One-on-One Performance Coaching</u> - Each participant will be assigned to an executive coach to review DiSC/363 analysis.
2.0 Hours	Strategic Thinking - Organizational Strategies & Development <ul style="list-style-type: none">• <u>Feedback Utilization</u> - Using the feedback developed in Phase I (Pre-work segment) of this program, the participants will work in peer team workshops to review, analyze and adjust their concepts around strategic planning for their respective organization. Each participant will end up with a set of long-range strategic goals, short-term objectives and action plans to facilitate growth in their organization.
4.0 Hours	Performance Management <ul style="list-style-type: none">• <u>Managing our Team</u> - Many of us did not get into management for the sake of intentionally getting into management. At times we are placed in that role without any formal training or coaching. Topics to be covered include: understanding the steps needed to manage performance, holding employees accountable, and learning how to develop trust and equitably establish expectations.



Phase III: Organization Implementation

It is only at the organizational level where change can be affected in any organization. It is at this junction that each executive will put into practice those lessons learned and the action plans decided upon in Phase I of this program.

- Implement and track, using scorecards provided in Phase I of the program the Organizational and Personal strategies, goals, objectives and action plans.

Phase IV: Workshop Session II

This day and a half workshop is designed as a debrief session, where instructors and peer groups will discuss and provide feedback (in groups and one-on-one) on participant progress to their stated action plans.

<u>Follow Up - Day One</u>	
Time	Description
4.0 Hours	<p>Strategic Thinking Follow Up & Presentation Preparation</p> <ul style="list-style-type: none"> • Follow up coaching sessions will occur to allow participants the opportunity to give and receive feedback in regards to their IDP that was created in Phase II • Participants will prepare a 3-5 minute presentation on anything they have learned in the program and implemented, and either the success or failure they had as a result.
2.0 Hours	<p>Individual Presentations</p> <ul style="list-style-type: none"> • Participants will present their prepared materials from the day's morning session.
2.0 Hours	<p>Generations</p> <ul style="list-style-type: none"> • This is the first time in U.S. history where four generations have worked together in the workplace. Differences in values and work styles may lead to conflict. Participants will gain a better understanding of how to navigate through these conflicts through areas of discussion such as: generations defined, leveraging gaps, generational characteristics in the workplace, and effective communication.
<u>Follow Up - Day Two</u>	
Time	Description
4.0 Hours	<p>Team Dynamics</p> <ul style="list-style-type: none"> • This session focuses on the skills needed to successfully build and maintain a productive employee team framework. Through group exercises, discussion and role playing, participants will gain a better understanding of team dynamics. Participants will identify issues related directly to their experiences in a hands-on and participative setting. <ul style="list-style-type: none"> - DVD: Dewitt Jones – Everyday Creativity
	Graduation / Adjourn

Registration Deadline *October 15, 2014*

***Class size is limited to the first 15 registrants*

Registration includes:

- *Assessment fees*
- *Course materials*
- *Lunch on session days*
- *1 Group dinner*

Participants responsible for travel, hotel and meals

Billings

AE Training Rooms
2727 Central Avenue, Suite 2
Billings, MT

Dates

Workshop Session I: November 11, 12 & 13, 2014

Workshop Session II: February 10 & 11, 2015

LEADERSHIP IS
A CALLING AND
AN ART- NOT A
SCIENCE."

- James Autry

Thank you for choosing AE for your training and development needs.

Registration Form

Name(s): _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Registration Fees:

Associated Employers Members -	\$ 2,250.00 / participant
Non-members -	\$ 3,000.00 / participant

Payment: Check Enclosed (Payable to Associated Employers)
 Bill Me
 Credit Card (We will contact you for card information)

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