



LEADERSHIP INSTITUTE

June 2-5, 2019
Hyatt Regency O'Hare

Facilitators: **N. Karl Haden, Ph.D.**, President and Senior Consultant, AAL
Susan Clarine, CPC, ACC, Senior Consultant, AAL
Thomas More Smith, Ph.D., Senior Consultant, AAL; Associate Professor, Practice of Finance, Goizueta Business School, Emory University

Sunday, June 2, 2019	
Welcome and Introductions	
5:30 pm	Registration opens
6:30 pm	Reception
7:00 pm	Welcome and Dinner
7:45 pm	Getting to Know Your DTA Leadership Institute Colleagues and Instructors <ul style="list-style-type: none"> • Review the DTA Leadership Institute agenda • Engage with other participants about their goals for participating in the Institute • Participate in a team building activity
8:30 pm	Adjourn
Monday, June 3, 2019	
Theme: Personal and Interpersonal Skills for Leadership	
7:00 am	Breakfast
7:45 am	1.1 Actualizing Your Leadership Potential: The Myers-Briggs® Type Indicator and Leadership (Dr. Karl Haden) <ul style="list-style-type: none"> • Assess one's personal preferences for taking in information and making decisions • Describe one's unique leadership style using the MBTI model Step II Interpretative Report • Identify action steps to improve one's contributions as a leader and team player in the work environment
9:45 am	Break
10:00 am	1.2 Building High Performance Teams (Susan Clarine) <ul style="list-style-type: none"> • Apply MBTI Type theory to team dynamics • Describe the 5 characteristics of highly functional teams • Identify ways to make team meetings more productive • Develop action steps to improve your skills for engaging individual members and motivating the entire team
Noon	Lunch
12:45 pm	1.3 The 9 Virtues of Exceptional Leaders (Dr. Karl Haden) <ul style="list-style-type: none"> • Identify personal purpose and values as leadership motivators • Describe how to create habits (virtues) that contribute to the success of the business • Discuss the application of virtues (e.g., courage, hope, justice) to specific leadership responsibilities
2:30 pm	Break
2:45 pm	1.4 Coaching Employees to Improve Productivity and Results (Susan Clarine) <ul style="list-style-type: none"> • Diagnose the causes of performance problems • Apply techniques for giving feedback that is specific, timely, and focused on behavior change • Create a plan to involve employees in developing solutions to improve their performance
5:00 pm	Adjourn
6:30 pm	Dinner

Tuesday, June 4, 2019	
Theme: The Leader as Strategist and Change Agent	
7:00 am	Grains and Brains (Breakfast and Dialogue) (Dr. Karl Haden) <ul style="list-style-type: none"> • Guided discussion about how participants will apply learning from Day 1
8:00 am	2.1 Applied Strategic Planning (Dr. Karl Haden) <ul style="list-style-type: none"> • Apply the four-frames model to understanding businesses • Understand the process for developing an applied strategic plan • Describe how to integrate human and financial resources into execution strategy
10:15 am	Break
10:30 am	2.2 Winning Negotiation Strategies (Dr. Karl Haden) <ul style="list-style-type: none"> • Understand the stages of negotiation processes • Identify barriers to bargaining and how to overcome them • Practice a model for win-win negotiation
12:30 pm	Lunch
1:15 pm	2.3 Leading Change (Dr. Karl Haden) <ul style="list-style-type: none"> • Assess one's personal style of approaching change • Develop strategies for getting others committed to the change process • Describe practices to manage one's emotions when under pressure
3:00 pm	Break
3:15 pm	2.4 Peer Coaching (Dr. Karl Haden) <ul style="list-style-type: none"> • Apply a 3-phase model for group problem solving • Receive feedback from peers on real challenges/opportunities that you face at your company
4:30 pm	Adjourn
6:30 pm	Reception and Dinner
Wednesday, June 5, 2019	
Theme: The Leader as Facilitator and Innovator	
7:00 am	Breakfast
8:00 am	3.1 Financial Management for Nonfinancial Managers (Dr. Tom Smith) <ul style="list-style-type: none"> • Understand the balance sheet basics and P&L responsibilities • Apply standard techniques of analysis, including overhead, capital budgeting, cash flow, valuation, and risk analysis • Explain how to develop budget projections, performance goals and incentives and use diagnostic and interactive control systems to achieve those objectives
10:15 am	Break
10:30 am	Financial Management for Nonfinancial Managers, continued
Noon	Lunch
12:45 pm	3.2 Creativity and Innovation: What Box? (Dr. Karl Haden) <ul style="list-style-type: none"> • Examine and discuss characteristics of innovative companies • Practice techniques and tools to promote your and your team's creative thinking • Describe approaches for producing, evaluating and implementing new ideas
1:45 pm	Wrap up and Next Steps
2:00 pm	Adjourn