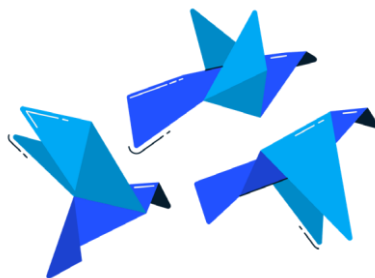


Take a Step. Forward.



My Learning Workbook

Your Name: _____

Welcome to the McKinsey Forward Program

What is Forward?



Forward is a **10-week online learning program** delivered in a digital and virtual format



It begins by building **foundational career skills** at the Core Skills Level through online courses, case scenarios, and interactive learning events. Ultimately, you will develop new behaviors through ongoing reflection and application



At the end of the program, you will receive a **McKinsey Forward digital badge** and join the **Network Level**, an exclusive global network of lifelong learners

What is the Forward Learning Workbook?



Your **Learning Workbook** is your **essential companion** on your journey during and after the program



It serves as a canvas for you to capture **key learnings, ideas, and reflections**. During the online courses you will be **prompted to visit the Learning Workbook to complete exercises and reflections**



The Forward team will **not request the workbook** and you will **not be required to** submit the workbook

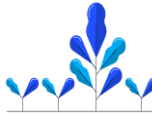
Forward Learning Workbook Contents



Introduction to your journey ahead



Skills Reflection



Adaptability and Resilience course



Problem Solving course



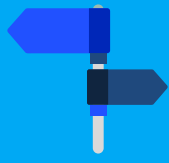
Communicating for Impact course



Relationships & Well-being course



My Digital Toolkit course



Your Roadmap and Planner

Below is the list of components you will see in the digital learning plan on the learning platform. Use this checklist to mark your progress along the learning journey. Use the suggested timelines to help you pace yourself through the journey to complete by the deadline

| | Item | Description | Duration |
|----------------------|--|---|--------------------|
| Preparation & Week 1 | <input type="checkbox"/> Complete the Welcome: Introduction to your Journey Ahead component | An overview of the skills you will learn in this program and how you can use them in your career journey | 20 minutes |
| | <input type="checkbox"/> Download and save the Forward Learning Workbook (located within 'Resources for your Journey' or all of the digital courses) | An essential companion during your learning journey to capture key learnings, ideas, and reflections | 5 minutes |
| | <input type="checkbox"/> Visit the ' Join a Welcome Webinar ' component to sign up for an optional webinar and attend it | An opportunity to meet the Forward team, McKinsey leaders and previous Forward participants to get an overview. It is optional and sessions are only available in the early days of the journey | 1 hour |
| | <input type="checkbox"/> Complete the Survey: Reflect on your Skills component. | A powerful tool to reflect on your current future of work skills and behaviors before you embark on the courses | 10 minutes |
| Weeks 2-3 | <input type="checkbox"/> Complete the Adaptability & Resilience digital course. Visit your workbook as you progress to progress and take notes. | 4 self-paced digital modules where you explore effective learning habits and the mindsets to embrace change | 2 hours |
| | <input type="checkbox"/> Visit the Attend the Mandatory Webinar: Lead Forward – Mindsets for Growth component to sign up for 1 session | A sign-up form to sign up for 1 of the sessions taking place during the program | 5 minutes |
| | <input type="checkbox"/> Depending on which date you signed up for, attend the ' Mandatory Webinar: Lead Forward – Mindsets for Growth ' | A chance to put learnings from the Adaptability & Resilience course into practice and go deeper into self-leadership skills | 1 hour 30 minutes |
| Weeks 4-5 | <input type="checkbox"/> Complete the Problem-Solving digital course. Visit your workbook as you progress to progress and take notes. | 5 self-paced digital modules where you learn how to apply structure thinking to define problems and reach a solution | 3 hours 30 minutes |
| | <input type="checkbox"/> Complete and submit the Case Assignment: Solve a traffic problem through the form in this component | A real-word case to solve while putting the learnings from Problem Solving into practice | 1 hour |
| Weeks 6-7 | <input type="checkbox"/> Complete the Communicating for Impact digital course | 5 self-paced digital modules where you discover techniques for focusing, organizing, and engaging in meaningful communication | 3 hours 30 minutes |
| Week 8 | <input type="checkbox"/> Complete the Relationships & Well- Being digital course | 3 self-paced digital modules where you will explore strategies for improving well-being through strong relationships and safe team environments | 2 hours |
| | * If you have not already, ensure to check the available ' Mandatory Webinar: Lead Forward – Mindsets for Growth ' sessions and sign up to attend one of these sessions prior to program end date | | |
| Weeks 9-10 | <input type="checkbox"/> Complete the My Digital Toolkit digital course | 1 self-paced digital module where you create a plan for yourself to stay up to date with the different elements of digital | 1 hour |
| | <input type="checkbox"/> Complete the ' Survey: Reflect on your growth ' component | A powerful tool to reflect on how your future of work skills and behaviors have been impacted during the program | 15 minutes |
| | <input type="checkbox"/> Complete the Feedback Survey: What did you think of your experience? component | An opportunity to share your experience in the program by completing this brief feedback survey | 5 minutes |

Introduction to your journey ahead





Forward Learning Workbook Exercise #1: Reflect on your journey ahead

As you go through the modules, it is important to recognize why you are learning these skills and what you plan on using them towards. Identifying key motivators will keep you persistent through your journey!

What opportunity are you working towards?

What might help you get there?

What are your goals for this program?

What are you most excited about in this program?



Forward Learning Workbook Exercise #2: What skills are crucial to you?

While all the following skill modules will be crucial to your journey, it is important to recognize which modules you would like to prioritize & how you plan on practicing these skills in your day-to-day life.

What three skills do you think will be the most important for your career moving forward?

Based off what you have learned so far in the course, take a moment to reflect. Click on the blue boxes to answer the question.

- ☐ Adopting mindsets and habits that make you adaptable and resilient in difficult times
- ☐ Defining problems and prioritize tasks in a structured manner when faced with a new problem to solve
- ☐ Planning and structuring your communication to address an audience to take action
- ☐ Understanding the digital world and developing a digital toolkit for success
- ☐ Building strong relationships and maintaining your well-being

As you continue with this program, think about why these skills are the most important for your career moving forward.

Skills Reflection

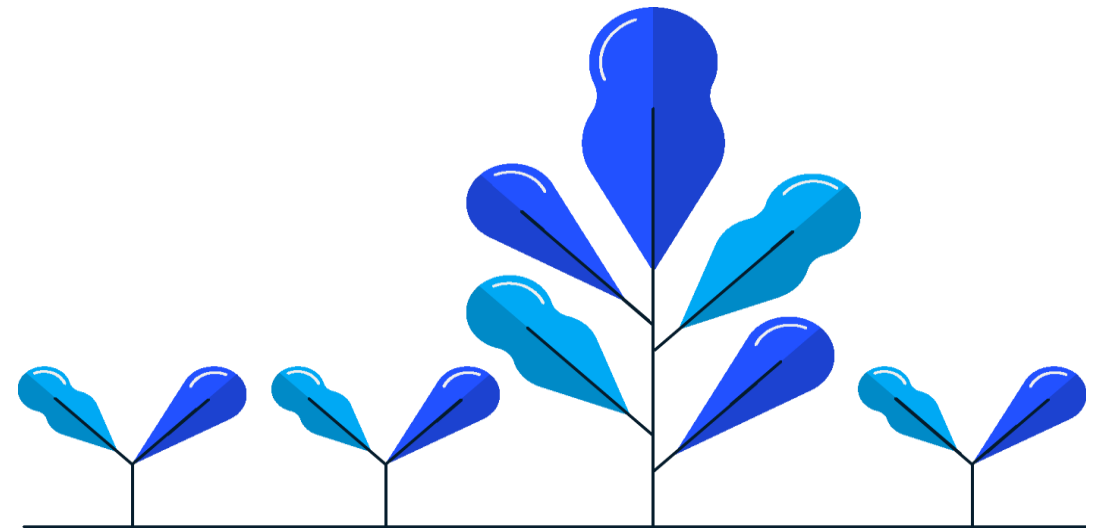


Skills Reflection

This tool will help you reflect on your skills before embarking on your journey with the program and even months after. By reflecting on the frequency in which you behave in certain ways, you will get insights into your strengths and areas of improvement, which can help you focus as you go through the journey and set learning intentions to further your growth. Read each of the 10 behaviors carefully and select the choice that best reflects how frequently you usually engage in this behavior.

| | | Always or Almost always | Often | Sometimes | Seldom | Never or Almost never |
|--|--|----------------------------|----------------------|----------------------|----------------------|--------------------------|
| ADAPTABILITY & RESILIENCE | | | | | | |
| Being aware of and shifting mindsets in challenging situation | In a challenging situation, I am aware of how I am thinking, feeling and behaving and actively try to adjust if needed. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Intentionally seeking learning opportunities | I jump on the opportunity to learn new things outside my comfort zone, even if that means making mistakes. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| PROBLEM SOLVING | | | | | | |
| Using structured thinking to define a problem | When faced with a problem, I define it and break it down into different pieces before starting to solve it. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Using structured thinking to reach a recommended solution to a problem | To reach a recommended solution to a problem, I rely on several analysis and present a synthesis of the insights. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| COMMUNICATING FOR IMPACT | | | | | | |
| Communicating a large amount of information in a brief and insightful way | When communicating a lot of information, I start with my most important message and then support it with details as needed. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Tailoring a message to the needs of my audience | When preparing any piece of communication, I analyze my audience and their needs and tailor the message accordingly. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| RELATIONSHIPS & WELL-BEING | | | | | | |
| Building psychological safety in teams | I create a team environment where people feel heard and appreciated and want to coach each other. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Maintaining well-being | I assess my physical and mental well-being and actively try to improve it by incorporating new habits. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Investing in workplace relationships | I build or deepen relationships with colleagues at work by being attentive, vulnerable, empathetic, and compassionate. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| NAVIGATING THE DIGITAL WORLD | | | | | | |
| Building a digital toolkit | I proactively identify and pursue opportunities to grow my knowledge and skills in data, technology and new ways of working. | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Adaptability and Resilience Course





Setting meaningful learning intentions

Tip: to set meaningful learning intentions, follow these 3 guiding principles to ensure you get the most out of setting these intentions

1. **Preparation:** investing the time and energy to set yourself up for success
2. **Execution:** learning and performing to the best of your capabilities, and enjoying yourself in the process
3. **Reflection:** learning from your past actions

We live in a complex world with more stimuli than we can possibly process. Setting learning intentions helps us to cut through the noise and stay focused on what we've identified as personally important.

There are two specific, subtle ways in which we can frame our intentions—our direction forward—that support both our ability to learn and the likelihood that we'll enjoy the experience.

Focus on the journey

Frame your desired outcome as a learning intention versus a performance goal.

Good learning intentions prioritize the experience itself, not just the outcome. Instead of focusing on a specific target, they focus on:

- The process
- Discovering and exploring new ideas
- Our growth

Link to meaning

Connect your learning to something that is personally meaningful to you.

Taking the time to make this connection will help you learn better and have more fun in the process.

Questions you might ask yourself include:

- When things get hard, what keeps me motivated?
- What makes me feel fulfilled and proud?

My notes



Forward Learning Workbook Exercise #3: What's your learning intention for this program?

Adaptability & Resilience
Setting learning intentions

Take a moment to reflect here. Build your learning intention for this program and reference the suggested structure in the module to guide your thinking.



Use APR to activate adaptability and resilience

More than just recognizing when we or others are not demonstrating adaptable and resilient mindsets, we have the opportunity to actively shift those mindsets. APR is a technique that you can use both in the moment and as a tool for reflection.

Awareness

Become aware that I am operating from “default”

Think of something you have been finding challenging.

What does it make you think and feel?

What are your mindsets?



Pause

Interrupt & create space

Take a pause in this very moment to center yourself. Maybe take a few deep breaths or plant your feet on the floor.



Reframe

Use specific questions to embed new mindsets and take an aware action

What opportunities would there be if you were to shift your mindset?

Continue to think about ways you can flexibly incorporate APR in your daily practices. In particular, think about how you can practice integrating questions that will help you to reframe specific mindsets.

My notes



Forward Learning Workbook Exercise #4: Holding adaptable and resilient mindsets

Take a moment to think and reflect here. Within the past week, how frequently have you held an adaptable and resilient mindset? For times when you didn't hold these mindsets, what could you do differently to shift your mindset?



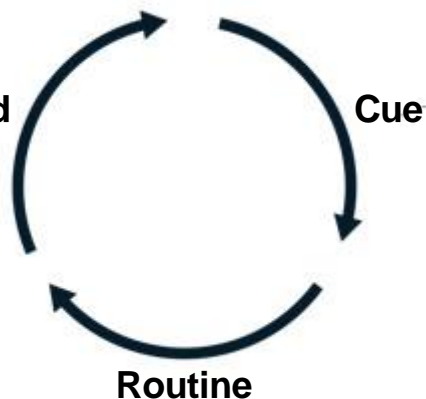
Turning behaviors into habits

Practicing a behavior for one to two months turns it into a habit, but habit formation takes more than just time. To establish healthy habits or break unhealthy ones, you must grasp how habits form and endure and take actions to make behaviors stick via a Habit Loop.

What will your reward be? What will make you feel good about your routine?

- When adopting feedback as a learning habit, the feedback itself can be the reward.
- But you should also consider other physical, mental, or emotional rewards.
- The reward could be the gratification of marking a big X on your calendar or something more concrete.

Reward



Cue

Routine

What's the reminder? In other words, what cue will trigger your habit?

- You might set an electronic reminder: for example, a calendar invite that pops up at the start of every week.
- You might try a physical note or object, like a reminder you place by your desk. Or perhaps you have a calendar out in the open, featuring an X on every day that you gave or received feedback.

What's the routine? What steps are required to uphold this habit?

- Perhaps you set aside time for feedback in your standing meetings.
- Maybe you reach out to a new, different person each week to ask for feedback.
- Alongside implementing the habit, you might also reserve time to consume content, like articles or videos, and reflect on potential obstacles and their solutions.

My notes



Forward Learning Workbook Exercise #5: What's your plan?

Start by choosing a behaviour you'll focus on. Reflect below on the following questions as they relate to the Habit Loop:

- How will you truly make this new behavior a habit?
- What cue will trigger your habit? An electronic reminder? A physical note or object? A specific meeting?
- What will the habit look like in action or what will be the routine?
- What reward will make you feel good about your routine?
- Why is this habit meaningful to you?
- How will you ensure you are maintaining this habit?
- What might you need to unlearn?



Adaptability and Resilience Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to build your adaptability and resilience skills.

- 1 Learning Intention vs. Performance Goal:** Set a learning intention when acquiring a new skill; use performance goals when you already have the skills and want to achieve specific results.
- 2 Focus on the journey and personal meaning:** Improve your ability to learn by focusing on the process, not just the outcome, and connect your learning to something personally meaningful.
- 3 Mindset awareness:** Differentiate between your helpful and unhelpful mindsets and recognize their influence on your behavior and progress.
- 4 Shift Mindsets for Resilience:** Cultivate adaptability and resilience by practicing APR (Awareness, Pause, and Reframe) during challenging situations.
- 5 Habit Formation:** Develop a customized action plan for building desired habits and unlearning unhealthy ones. Utilize the habit loop (Cue, Routine, Reward) to reinforce positive habits effectively.

My notes



End of Course Reflection: Adaptability & Resilience

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

Problem Solving Course





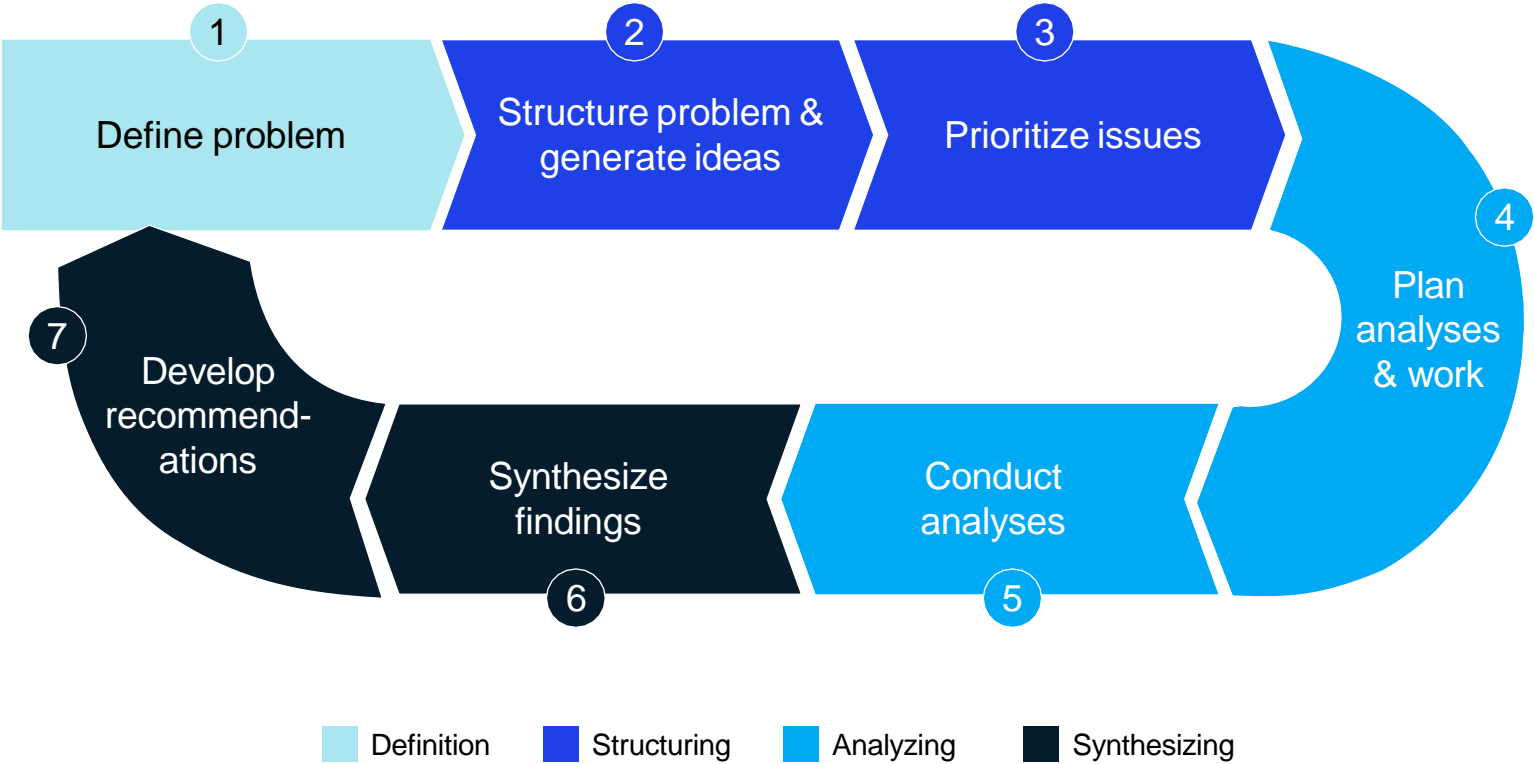
Forward Learning Workbook Exercise #6: Your approach to problem solving

Take a moment to reflect. Consider a current problem that you're having on the job or at home.

- How can you take a more structured approach to solving that problem?
- Describe your personal approach to problem solving at work or at home. Do you tend to be structured and evidence-based? Or do you take a more intuitive approach? What are the benefits and shortcomings of your current approach?



Using the seven-step, hypothesis-led approach to problem solving

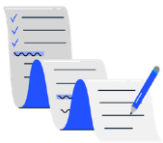


My notes



Forward Learning Workbook Exercise #7: How do you define problems?

**Take a moment to reflect. Do you usually take time to define a problem before attempting to solve it?
If so, how? What is your process?**



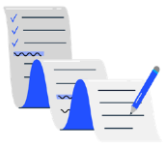
Testing your problem definition using the SMART framework

Tip: use this to test whether you've written your problem statement or question in a way that helps reach the solution.

My notes

| | | |
|----------|-------------------|---|
| S | SPECIFIC | Is the question specific enough? Your problem question needs to be detailed enough so that those who are closest to the problem can understand the exact problem that needs to be solved. |
| M | MEASURABLE | A measurable result will be instrumental in helping you determine when the problem will be considered solved. This should be a quantifiable number. |
| A | ACTIONABLE | The problem question should point to the action that needs to be done to solve the problem. Usually, you will need to use the language "How?" or "What actions do we need to take?" in your problem question. |
| R | RELEVANT | Your problem question should be relevant to everyone involved in the situation: the executive, your team, and any other stakeholders. It's important to align everyone so that you all have same goals in mind. |
| T | TIME-BOUND | Problem questions should always be time bound to ensure that everyone comes up with solutions that are practical in the time frame that you have defined. |

| |
|----------------------------|
| Introduction |
| Skills Reflection |
| Adaptability & Resilience |
| Problem Solving |
| Communicating for Impact |
| Relationships & Well-being |
| My Digital Toolkit |



Using a Problem Statement Worksheet to define a problem

Tip: use this to summarize the problem in a concise way, clarifying precisely what needs solving.

Problem question (The basic question to be resolved)

Concisely define, in the form of a question, what must be resolved. This focuses your work and ensures that your findings are actionable. Your basic question should be **SMART**: **S**pecific, **M**easurable, **A**ction-oriented, **R**elevant, and **T**ime-bound

Context

Think about the “environment” around the problem you’re facing. Will internal or external situations affect how you solve the problem? Are there complications to consider? This field may encompass current industry trends, availability of finances, or skill gaps on your team.

Constraints within solution space

While scope defines the space of your solution, constraints focus on what can or cannot happen within that space.

Criteria for success

What must happen for your solution to be successful? What could happen to make your solution a failure? Consider timing of impact, visibility of improvement, mindset shifts, and what success looks like for key stakeholders. Criteria should be measurable, so you can judge whether or not your final solution satisfies them.

Stakeholders

List all the major players critical to your solution. Consider all decision makers who could support—or block—your solution. Also include internal or external parties who might affect how your solution is implemented.

Scope of solution space

What will and will not be considered in your solution? The scope should be broad enough to ensure that you’re considering all relevant solutions, yet narrow enough to ensure that your analysis is manageable.

Key sources of insight

These are where you will turn for information. Can you leverage available resources from your department, company, or industry? Identifying these resources will simplify your effort and ensure you’re not repeating work that’s already been done.

My notes



Forward Learning Workbook Exercise #8: Integrating what you've learned

Take a moment to reflect. How has your thinking about problem definition evolved?

- What have you added to your approach?
- What new steps, tools and techniques would you like to integrate into your approach to problem definition?
- What are you most excited to try on the job?



Work planning tools

Best practices

| | |
|-------------------|---|
| Early | Make sure data and other critical items come in as early as possible. |
| Often | Revise your work plan as you update and improve your issues and hypotheses. |
| Specific | Be specific on analysis and sources. |
| Share | Test with team members; try alternative hypotheses. |
| Milestones | Be disciplined—deliver on time using 80/20. |
| Simple | Push detailed work plans out only 2-4 weeks ahead. Don't write a lot. Keep it simple. Take it piece by piece. |
| Realistic | Make it manageable and realistic; otherwise it will not be used. |

Work plan worksheet template

Issue

**Hypothesis/
rationale**

**End
product**

Analyses

Sources

**Timing/
Responsibility**

My notes



Problem Solving Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to effectively approach complex problems that you will encounter and need to solve:

- 1 Structured approach to problem solving:** Intentionally take a structured step-by-step approach to solve different types of problems that you may need to solve.
- 2 Problem Statements:** Before diving into a solution, define your problem in one SMART statement or question and lay out different aspects to consider.
- 3 Issue trees:** Break problems down into specific investigation areas and assess if each can be further broken down into a list of mutually exclusive, collectively exhaustive (MECE) possible solutions.
- 4 Work planning:** Prioritize the most important pieces of analysis to focus on and create a work plan that includes each piece, its expected outcomes, timelines, and sources of information.
- 5 Synthesis and recommendation:** Bring together all the findings from your work, develop a “so what”, and tell others what you think needs to be done in order to solve the problem based on your analysis.

My notes



End of Course Reflection: Problem Solving

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

- Introduction
- Skills Reflection
- Adaptability & Resilience
- Problem Solving**
- Communicating for Impact
- Relationships & Well-being
- My Digital Toolkit

Case Assignment Worksheets

Use the **next 3 worksheets** to **practice completing the Hustleton Traffic Problem assignment** which you will find in your digital platform under the ‘**Case Assignment: Solve a traffic problem**’.

When you are done practicing using the worksheets, **submit your answers on the digital platform under the ‘Case Assignment: Solve a traffic problem’**.

To keep a copy of your answers, **make sure to write them in your Forward Learning Workbook**.



1. Problem Definition Worksheet

How to use this worksheet

Use this worksheet to practice completing the **first step of your assignment**: defining the problem clearly for all stakeholders involved.

Using the information provided in the email from the Mayor, concisely define what must be resolved.

What is the Key Problem Statement?

(Write it down, starting with 'How can the city of Hustleton...')

Before you continue, put your statement to the test. Is it SMART?

Specific

Is it sufficiently narrow, not too broad and general?

Measurable

Can you quantify and measure it using some metric?

Action-oriented

Is it clear what needs to be taken action on?

Relevant

Is your problem statement relevant to the problem at hand and for the stakeholders involved?

Time-bound

Is there a time horizon that indicates when the problem needs to be solved?



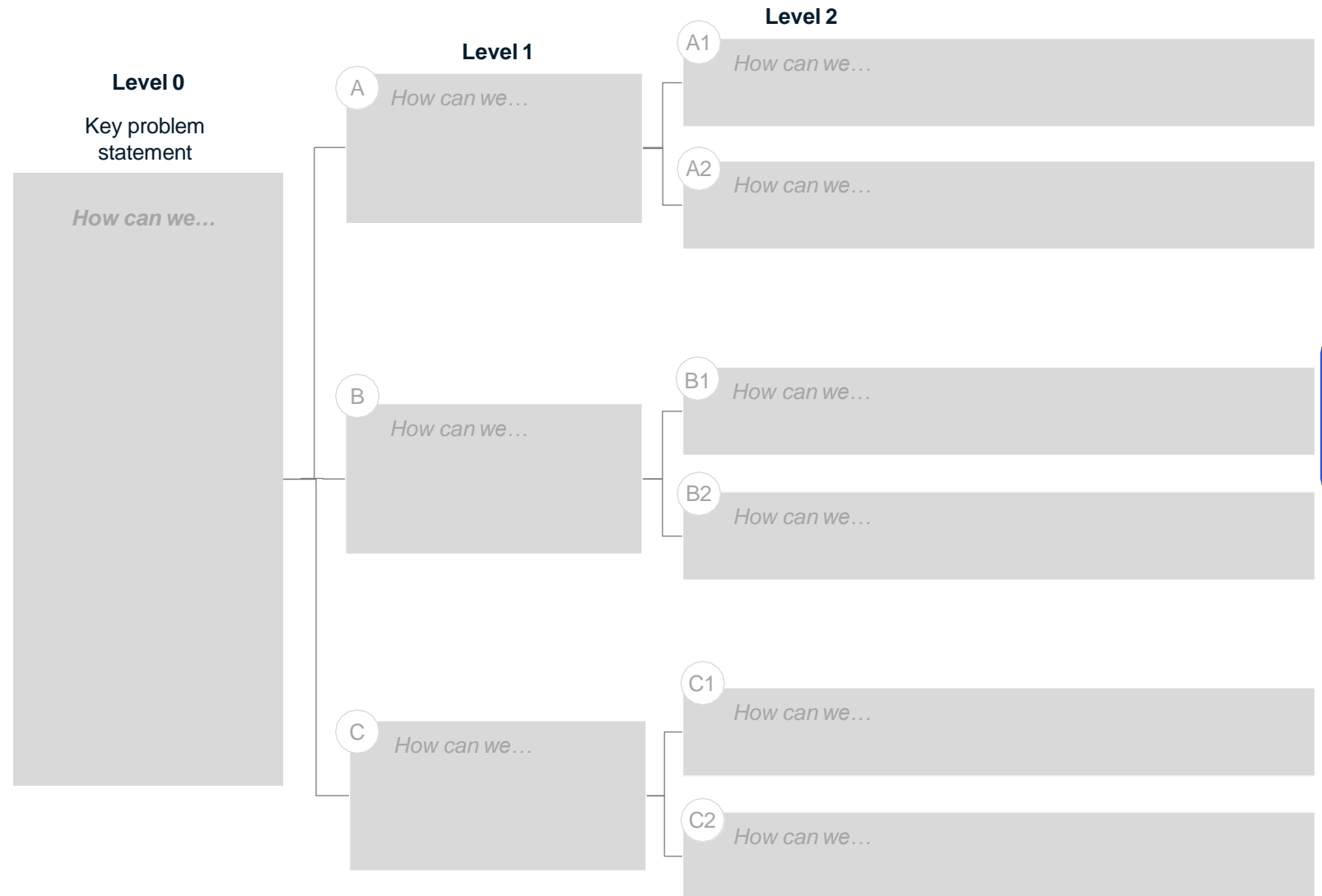
2. Issue Tree Worksheet

How to use this worksheet

Use this worksheet to practice the **second step of the assignment**: identifying a list of potential issues that if resolved, will likely lead to solving the problem.

Write down the problem statement you've defined in the previous step at Level 0 of the tree and then break it down into smaller issues in Level 1 (A, B, C) and then further in Level 2. Structure your sentences consistently starting with 'How can we ...'

For example, if you were solving the problem of 'How can I increase the amount of money I save at the end of the month?' one of the smaller issues you might identify is 'How can I reduce the amount of money I spend?' and another one could be 'How can I make more money?'.





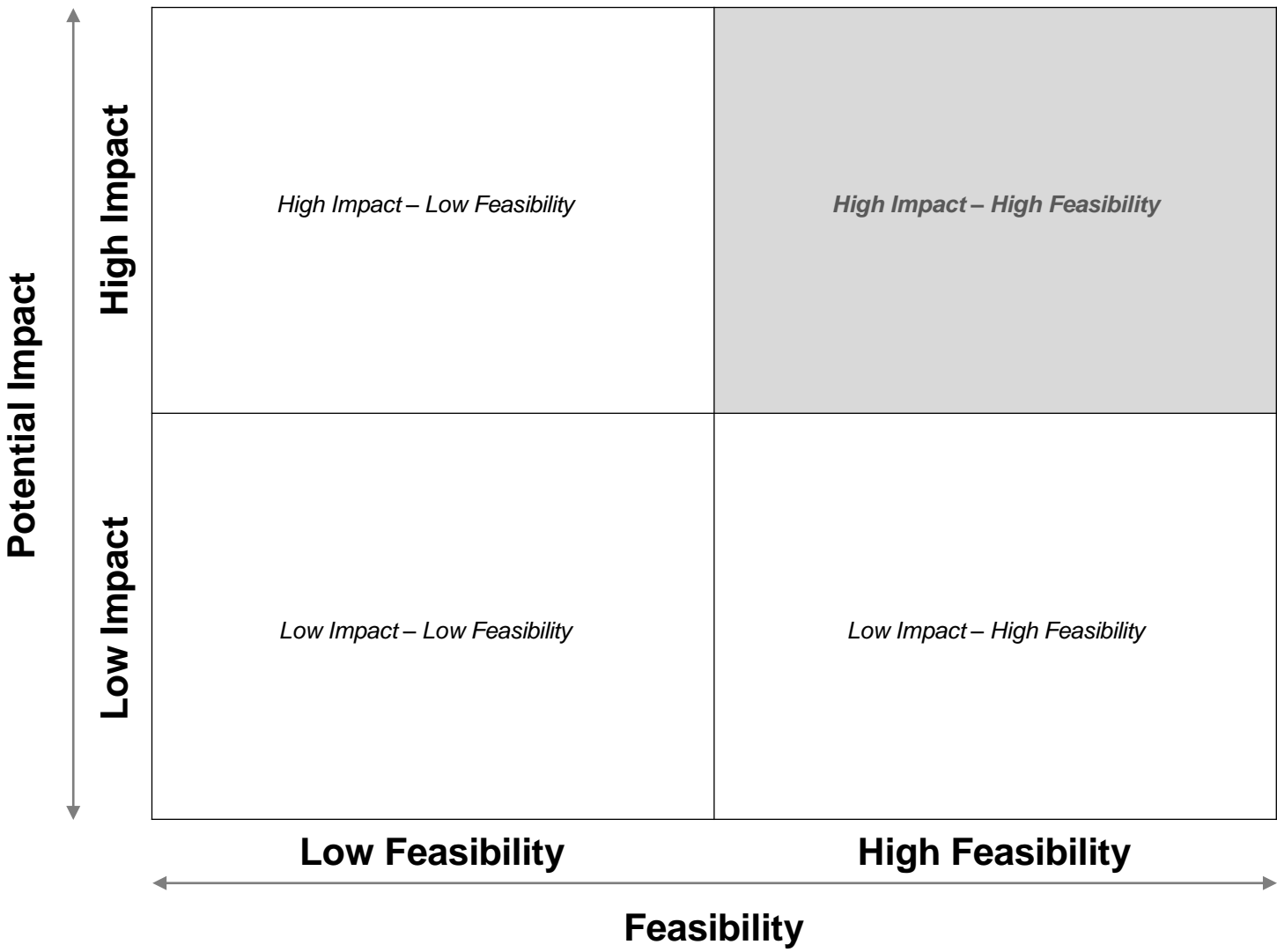
3. Prioritization Matrix Worksheet

How to use this worksheet

Use this worksheet to help you with the **third step in the assignment:** prioritizing two issues that should be analyzed more deeply.

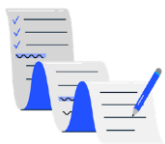
You should consider all the issues you wrote in the Level 2 of your issue tree. Which ones would you place in the highlighted quadrant of this two-by-two matrix? The quadrant called ‘High Impact –High Feasibility’.

To do so, compare them to each other, and ask yourself ‘which of these are likely to be the most feasible / easy to solve and at the same time have the biggest impact on the key problem statement?’



Communicating for Impact Course





EPIC framework

Tip: overcome common communication challenges, and move people to action based on four key steps of the EPIC approach to communications

E EMPATHY



Put yourself in the other person's shoes to understand their perspective.

P PURPOSE



Define the purpose to include their needs and yours.

I INSIGHT



Articulate (explain) your ideas in a clear and compelling way.

C CONVERSATION



Plan and orchestrate the flow of an effective two-way conversation.

My notes







Forward Learning Workbook Exercise #9: Reflect on a past interaction

Think about an important past interaction with a group of 2-3 colleagues. Reflect here on the following:

- What was the context?
- How do you think your colleagues felt going into the interaction?
- What was at stake for your colleagues?
- Was empathy involved in this interaction? If so, how? If not, what were the consequences?



Using active listening to demonstrate empathy

| Tactic | How? |
|---|---|
|  Supporting and encouraging | <p>Encouraging – “Yes, I see,” “of course,” facial expressions (e.g., smiling), open body stance</p> <p>Validating – “If I were in your situation, I’d feel the same way,” nodding/shaking head</p> <p>Imagining – “I can imagine it’s frustrating for you”</p> |
|  Reflecting and repeating | <p>Summarizing – “So would it be right to say there are three main issues...,” “It sounds like you’re saying ...”</p> <p>Describing – “You seem upset by that,” “It sounds like you felt angry with him”</p> |
|  Digging deeper | <p>Clarifying – “Why do you think that happened?” “Which of those issues came first?”</p> <p>Open – “How are you feeling about the project?” “What’s going on for you this week?”</p> |
|  Offering help | <p>Personal – “Is there anything I can do to help?”</p> <p>Hypothetical – “What would you like to happen in an ideal world?” “How can we make that a reality?”</p> |

My notes



Forward Learning Workbook Exercise #10: Reflect on a past interaction

Using the past interaction you identified in the last exercise, consider this interaction from a Purpose perspective:

- Were you clear on the purpose of the interaction? What was the purpose?
- Did you communicate the purpose up front?
- Was the purpose shared? If so, how?
- If it was not a shared purpose, what could you have done differently? What impact do you think that would have had on the outcome?



Using the Pyramid Principle to organize your messages

What should the pyramid contain?

- A single governing thought which is the key takeaway the audience must hear during the first 2 minutes of your communication event.
- 3-5 key line statements that act as the underlying arguments that support the governing thought.
- 3-5 supporting facts per key line statement which build the foundation of your pyramid and support both the key line statements and the governing thought.

How to get started building your pyramid

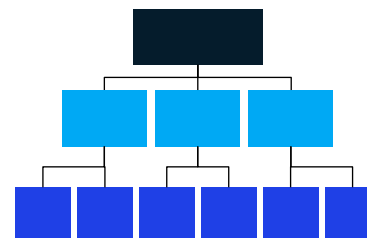
Step 1: Begin by reviewing the facts you have collected and create logical fact groupings.

Step 2: Strive to create groupings that have no gaps or overlaps. That is, they are:

- *Mutually exclusive:* The groups address unique issues with no overlap.
- *Collectively exhaustive:* As a set, the groups represent the spectrum of issues at play, leaving no gaps.

Step 3: Write a key line statement to synthesize each logical fact grouping.

Step 4: Write a governing thought to synthesize the key line statements.



■ **Governing thought:** The one-sentence answer or solution to a problem:

- Answers the central question, providing direction for a decision or action
- Makes an overarching point that is a synthesis, not a summary
- Is stated powerfully in short, sharp, plain language

■ **Key line statements:** The why and how to implement the solution, underpins the governing thought with no gaps, no overlaps (MECE):

- Each point synthesizes the points beneath it
- Points are at the same level of abstraction and in a logical order
- In a grouping, ideas are of the same logical kind (e.g., reasons, causes, steps, parts)

■ **Supporting data:** The supporting evidence:

- All data is relevant, sufficient, and fact-based
- Says enough about implications to enable decision making
- Items in each set are MECE

My notes

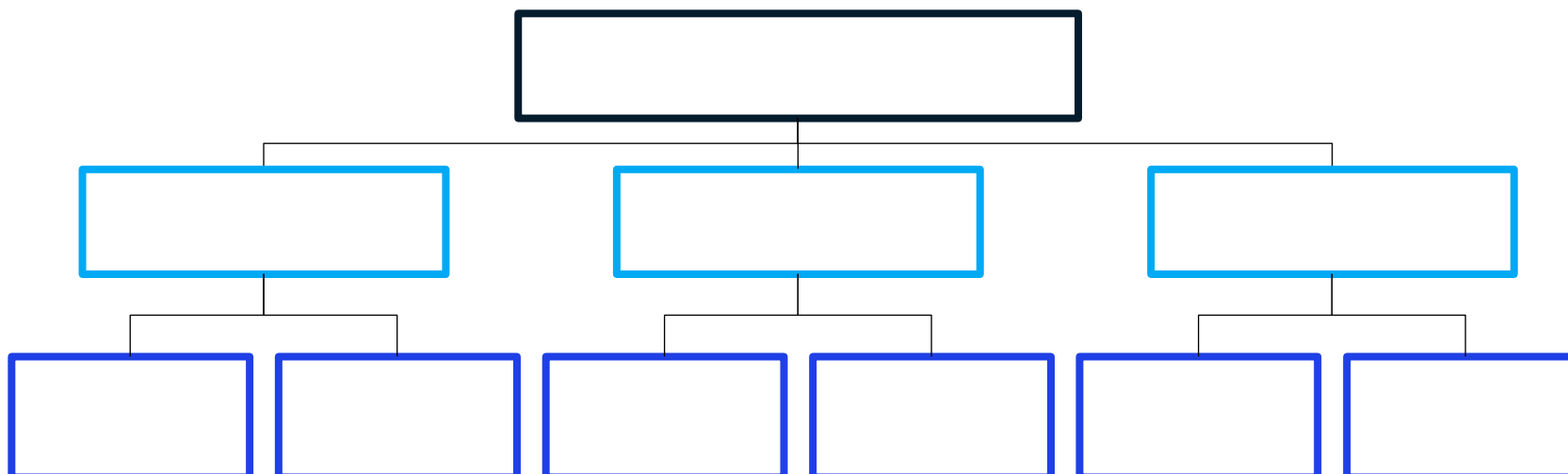


Try it now: Practice with the Pyramid Principle

Identify an email that you sent to a colleague in the last week which covered a substantial amount of information (i.e., longer than two paragraphs). Re-write your email here using the Pyramid Principle worksheet to structure your email in a more compelling way.

After structuring your thoughts in the Pyramid Principle Worksheet, in the space to the right, reflect on the following questions:

- What is your governing thought and why (which you lead with)?
- What are your few supporting arguments below the governing thought and why?
- What is your call to action and why (which you close with)?



My notes

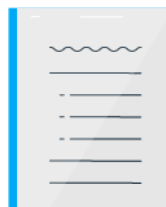


Synthesizing your messages rather than summarizing only



Summary

A condensed version of all the facts.



Synthesis

The “so what” of all the facts, providing insight that all the facts together create.

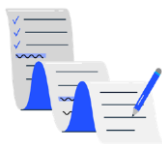
My notes

Example of summary vs. synthesis

There are several pain points that we heard from our customer interviews:

- In-store returns are a clunky experience and require customers to wait in line with paying customers.
- Waiting time for inventory checks in-store is too long given customer demand and number of staff available.
- Loyalty program sign-ups at the register require too much time to fill out.

- Overall, customers are looking for an enhanced in-store experience that reduces the time it takes from entry to exit and would opt for self-serve solutions to reduce the shopping-experience time.



Tapping into the Three Elements of Style for delivering your messages

Tip: use your physical presence, vocal emphasis and emotional connection to deliver your message in a way that moves your audience to take action.



Physical presence

- This refers to the speaker's ability to appear relaxed, confident, and in control of a room.
- Speakers with strong physical presence have good posture, make good eye contact, avoid fidgeting, use gestures appropriately, and move with confidence.



Vocal emphasis

- This primarily refers to the speaker's ability to adjust his or her pitch, pace, and volume to match the occasion.
- In addition, speakers with good vocal emphasis typically speak in the active voice and rarely use qualifiers or caveats.



Ability to make an emotional connection

- This refers to the speaker's ability to gauge the mood of the audience and adjust his or her tone accordingly.
- Speakers who are able to make an emotional connection typically make strong eye contact with their audiences and communicate emotion via their facial expressions and tone of voice.

My notes



Try it now: Practice the Three Elements of Style

Take a moment and record yourself speaking on one of the topics below:

- **Topic 1:** Take 10 minutes to prepare a brief message that you will deliver orally in an informal or formal meeting in the next week. Record yourself delivering the message with your smartphone and use the Three Elements of Style checklist to critique your own delivery.
- **Topic 2:** Take 10 minutes to prepare a brief message convincing a friend to watch your favorite TV show. Record yourself delivering the message with your smartphone and send it to your friend. Ask them to a) share whether or not they were inspired to watch the TV show, and b) provide feedback on your delivery style.

After recording yourself, use the checklist below to grade yourself across the Three Elements of Style and reflect where needed.

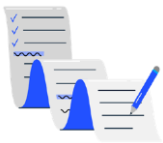
The upcoming opportunity I've chosen is:

My audience is:

The Purpose of my interaction is: *E.g., Inspire a colleague to take on a leadership role on my project*

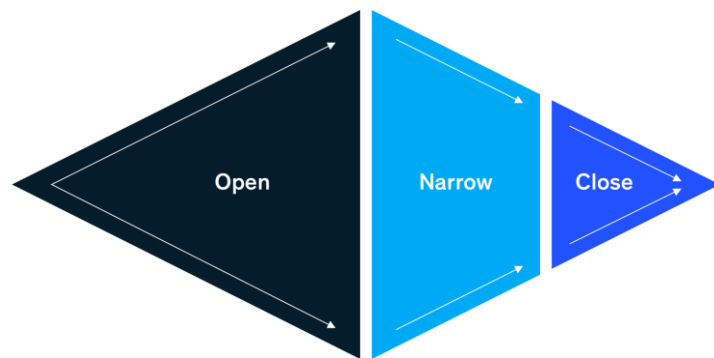
| | Vocal emphasis <ul style="list-style-type: none">• Adjusts pitch, pace, and volume to match the occasion• Uses the active voice• Minimizes qualifiers and caveats• Uses rhetorical techniques appropriately (e.g., repetition, alliteration, three-point lists, pauses for impact) | Physical presence <ul style="list-style-type: none">• Appears relaxed, confident, and in control of the room• Has strong posture• Moves with a purpose• Uses appropriate gesture• Optimizes physical environment | Emotional connection <ul style="list-style-type: none">• Express authentic emotions and/or vulnerability• Selects an appropriate tone to match the Purpose of the interaction• Has strong eye contact and uses appropriate facial expressions• Uses storytelling |
|--------------|--|---|--|
| Notes | <input type="text"/> | <input type="text"/> | <input type="text"/> |

My notes



Using the Open, Narrow, Close approach to facilitate a conversation

Tip: use this to organize the flow of a meeting starting from making people feel heard to reaching alignment on next steps



The **Open, Narrow, Close** approach to facilitation can serve as a useful architecture for your meeting:

- **Opening** a conversation is about making people feel comfortable about who they're with and what they're going to do in the meeting.
- **Narrowing** in on the conversation involves the right mix of questions and statements to help keep the thinking and process on track and to create an inclusive and open environment.
- **Closing** a conversation is about reaching alignment and synthesizing the group discussion with key takeaways and next steps with owners and deadlines.

My notes



Forward Learning Workbook Exercise #11: Reflect on a past interaction

Think about the past interaction with a group of 2-3 colleagues you identified in the prior modules. Take a moment to reflect in the space below about the following questions:

- Did the meeting have a clear and compelling opening? What did the facilitator do to make the participants feel comfortable about who they're with and what they're going to do?
- Did the facilitator ask provocative and insightful questions to narrow in on the conversation? How did they use questions and statements to help keep the thinking and process on track and also create an inclusive and open environment?
- Did the facilitator close the meeting with a clearly articulated outcome assigned to an owner with a set deadline? Were next steps defined?
- Did the facilitator help move the group to alignment, commitment, or action? If so, how?



Communicating for Impact Key Takeaways

As you leave this course, here are the key tools/takeaways that you can use to strengthen your communications with others:

- 1 EPIC framework:** Personalize, connect with, and effectively communicate your messages to others with this framework.
- 2 Empathy and active listening:** Consider how your audience thinks and feels before any interaction and use active listening to deepen your understanding and make them feel heard.
- 3 Purpose of an interaction:** Pause to think about what both you and the other person want to get out of an interaction and guide the conversation accordingly.
- 4 Story lining:** Weave your messages together in a clear storyline by using the Pyramid Principle to organize your one overall governing thought followed by insights.
- 5 Delivering with style:** Beyond what you will say, plan how to say it a way that moves your audience to action by using your physical presence, vocal emphasis and establishing an emotional connection.

My notes



End of Course Reflection: Communicating for Impact

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

Relationships & Well-Being Course





Considering the different ingredients of well-being

Your well-being tank is fueled by four sources: mental, physical, social, and spiritual. However, our habits often cause us to prioritize just one or two of these sources. To ensure your well-being is truly at its best, you should consider all four.



Physical

*Sleep, Exercise,
Nutrition*



Mental

*Hobbies, Meditation,
Focus, Introspection*



Social

*Relationships,
Societal role*



Spiritual

*Professional calling,
Spiritual connection*

Principles for putting this into practice

No matter which source of well-being you want to prioritize, or the specific behaviors you want to improve, there are four big ideas that will help you maximize your efforts.

- Tiny behaviors lead to sustainable change: be specific and focused in your actions.
- Small and frequent is best: don't rely on just one big moment to energize yourself.
- You have positive habits you can build upon: identify some existing cues that prompt healthy behaviors.
- People matter: find others who can support you, offer feedback, and share ideas with you.

My notes



Forward Learning Workbook Exercise #12: Assessing your battery level

Take a moment to reflect. Which of the following statements are true for you? Give yourself 1 point for each true statement. Make sure to note if certain categories are particularly strong or weak.

After you have taken a moment to reflect, calculate your total score and understand what it means. Use the guide in the module to get some suggestions.

| Statement | Reflection area: give your score and write notes if relevant |
|--|--|
| I slept very well last night. | |
| I have clear, purposeful intentions for the day. | |
| I am looking forward to the day's activities. | |
| I am optimistic about my future. | |
| I feel vigorous and energetic. | |
| My diet is healthy and well-balanced. | |
| I am experiencing very little fatigue or burnout. | |
| I can focus on the things that matter most. | |
| I feel connected to the important people in my life. | |

0–3

Your battery is empty

4–5

Your battery charge is running low and needs attention

6–7

You would benefit from extra charge to your battery

8–9

Your battery is fully charged



Try it now: Creating your recovery plan

Utilize the template below to create a recovery plan on how you can improve your well-being.

Morning

Afternoon

Evening

Bedtime



Role modeling well-being for others

“Your first and foremost job as a leader is to take charge of your own energy and then help to orchestrate the energy of those around you.”

— Peter Drucker

Research shows that, when it comes to well-being in the workplace, our behaviors are contagious. Your choices affect the choices of others around you, whether they realize it or not. Each of us should think about how we can maintain our energy and well-being and, in so doing, create a mutually reinforcing support network among our colleagues.

1 Set expectations and boundaries—and communicate them

Get clear on what you need to be your best self and share that with others. More than getting clear in theory, hold yourself accountable!

2 Share what is going on, and ask for support

Challenge yourself to be vulnerable and communicate openly, both about what is working and what is not.

3 Develop team norms

Well-being is easier with the support of a group. Similar to setting expectations and boundaries for yourself, go a step further and do the same as a team.

4 Celebrate one another

Did your teammate just run their first race? Did another make it to a child’s soccer game every weekend this past month? These seemingly small things are big deals, and our colleagues are more likely to continue to prioritize their well-being if they are actively encouraged.

My notes



Building strong relationships

We can develop strong, energizing, and resilient relationships by practicing AVEC: attention, vulnerability, empathy, and compassion.

A ATTENTION



Turning toward the other person literally and figuratively and listening deeply without judgment, distraction, or the desire to respond.

V VULNERABILITY



Being your authentic self, even if it feels outside of your comfort zone. Acknowledging the role you played in a situation or the assumptions you made, even if you are not proud of them. Sharing honestly how the actions of others affected you.

E EMPATHY



Understanding and identifying with the emotions and perspectives that others, based on what they share with you.

C COMPASSION



Demonstrating concern with an intent to be helpful. Checking in with individuals to see how they are doing and investing the time to respond in a meaningful way.

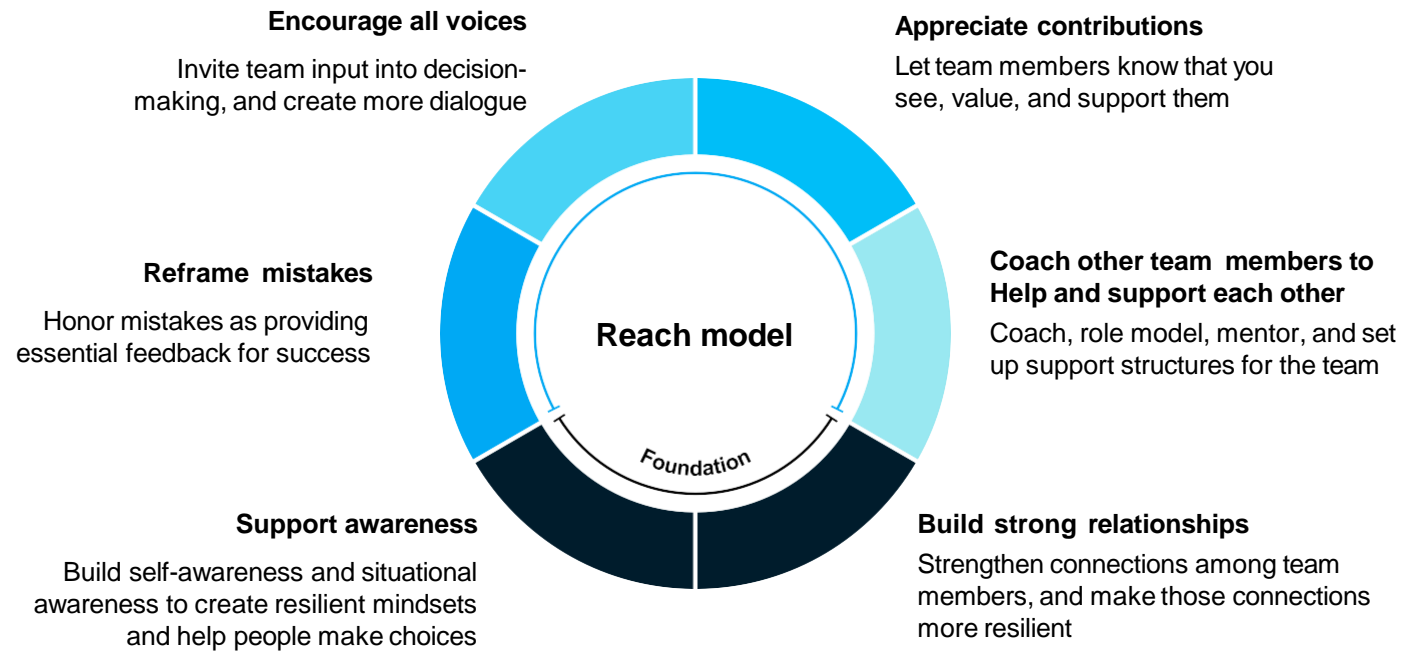
My notes



Establishing psychological safety for you and your teams

Psychological safety empowers people to fully contribute their unique talents and perspectives. When this happens, team members can come together to do their best work and learn and perform better, all while reducing stress.

Building from a foundation of awareness and strong relationships, we can use the four actions of the REACH model to guide us.



My notes



Relationships & Well-Being Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to maintain your energy levels and benefit from the power of strong relationships and team environment.

- 1 Well-being plan:** Regularly evaluate your current state of well-being across 4 dimensions of physical, mental & emotional, social, and spiritual and take explicit actions to improve areas that are low.
- 2 Practicing acceptance:** Become more emotionally flexible by understanding what is causing your current emotions and then deciding whether to address them or let them go.
- 3 Role modeling well-being:** Identify the standard for your optimal well-being and role model this standard for others.
- 4 Building relationships:** Invest time and effort in building and improving trust-based relationships with others by using attention, vulnerability, empathy, and compassion.
- 5 Psychological safety:** Improve your team performance and well-being by actively creating an environment where people are not afraid to speaking up, making mistakes, and are excited about coaching each other.

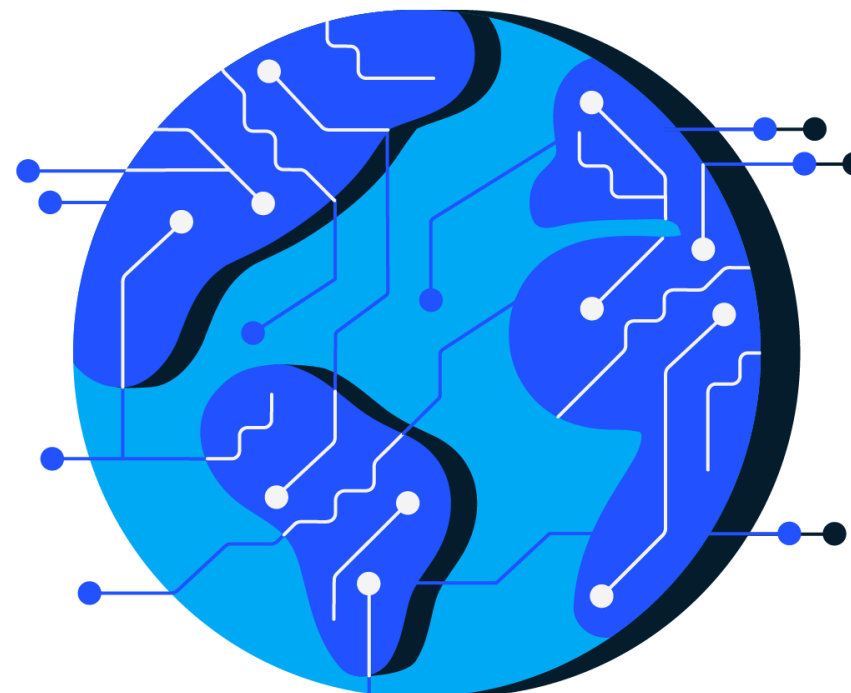
My notes



End of Course Reflection: Relationship & Well-being

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

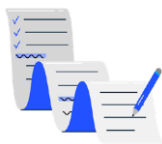
My Digital Toolkit Course





Forward Learning Workbook Exercise #13: How has digital impacted your life?

Take a moment to reflect here. What new app, device, or digital service have you started using? How has this product impacted your life? What made you start using this in the first place?



Consider the 3 elements of ‘going digital’

Digital is data, technologies, and new ways of working that can help us maximize value.



Data

How do new approaches to collecting and analyzing data help us better understand the people we serve, make better decisions faster, and develop new solutions?



Technology

How do new technologies help accelerate impact and solve problems at work?



Ways of working

How do new ways of working enable us to meet people's needs better and more quickly?

My notes



Forward Learning Workbook Exercise #14: Your digital toolkit and plan (page 1 of 3)

These three pages offer an opportunity to craft your own digital toolkit and plan. Taking one element of digital at a time (data, technology and new ways of working), reflect and answer the following questions.

Some examples for actions you can include in your plan include: taking an online course, reading a book, watching videos on Youtube, attending a workshop or webinar, seeking out a friend or colleague who is working in this field, joining a chat group, or simply practicing certain activities at work or your personal life.

Digital Toolkit Element #1: Data (this could include data analysis, visualization, cleaning, storage etc.)

| | |
|---|--|
| What have you already done to expand your knowledge and skills in this area? | |
| What is an obstacle you currently face in understanding or taking action in this area? | |
| Identify 1 or more specific actions you want to take to enhance your knowledge and skills in this area. | |
| Prioritize one action you will start immediately and specify a timeline for it | |



Forward Learning Workbook Exercise #14: Your digital toolkit and plan (page 2 of 3)

These three pages offer an opportunity to craft your own digital toolkit and plan. Taking one element of digital at a time (data, technology and new ways of working), reflect and answer the following questions.

Some examples for actions you can include in your plan include: taking an online course, reading a book, watching videos on Youtube, attending a workshop or webinar, seeking out a friend or colleague who is working in this field, joining a chat group, or simply practicing certain activities at work or your personal life.

Digital Toolkit Element #2: Technology (this could include cloud, artificial intelligence, connected devices etc.)

| | |
|---|--|
| What have you already done to expand your knowledge and skills in this area? | |
| What is an obstacle you currently face in understanding or taking action in this area? | |
| Identify 1 or more specific actions you want to take to enhance your knowledge and skills in this area. | |
| Prioritize one action you will start immediately and specify a timeline for it | |



Forward Learning Workbook Exercise #14: Your digital toolkit and plan (page 3 of 3)

These three pages offer an opportunity to craft your own digital toolkit and plan. Taking one element of digital at a time (data, technology and new ways of working), reflect and answer the following questions.

Some examples for actions you can include in your plan include: taking an online course, reading a book, watching videos on Youtube, attending a workshop or webinar, seeking out a friend or colleague who is working in this field, joining a chat group, or simply practicing certain activities at work or your personal life.

Digital Toolkit Element #3: Ways of Working (this could include design thinking and agile thinking etc.)

| | |
|---|--|
| What have you already done to expand your knowledge and skills in this area? | |
| What is an obstacle you currently face in understanding or taking action in this area? | |
| Identify 1 or more specific actions you want to take to enhance your knowledge and skills in this area. | |
| Prioritize one action you will start immediately and specify a timeline for it | |



My Digital Toolkit Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to build your digital toolkit in a modern digital landscape.

- 1 Going digital:** Recognize that a digital world is all about data, technology, and new ways of working that can help us maximize value.
- 2 Power of Data:** Notice how people and organizations are finding new creative ways to use data to improve experiences and decision making.
- 3 Embracing Technology:** Consider how new technologies such as cloud, artificial intelligence, and connected devices, help solve problems at home and at work.
- 4 New ways of working:** Embrace new ways of working like Design Thinking and Agile which prioritize the end user's needs, experimentation and rapid learning.
- 5 Build your digital toolkit:** Understand the profound impact of digital in life and work, and plan to continuously expand your knowledge and skills in data, technology, and new ways of working.

My notes



End of Course Reflection: My Digital Toolkit

Take a moment to reflect and jot down any key points that you would like to revisit in the future.