WORKBOOK

6. Integration

By Ilonka Malan

1 Introduction

During onboarding, you learnt about our work methods, including the P+ and M+ processes. You explored behaviour change and connected with peers in and outside your cohort group. We value your commitment. The integration module is not just for looking back; it is your guide to fully understand the essence and core of our business.

What will you experience in this module:

1. **Reflect on our DNA:** Reflect on the essential leadership principles rooted in Customer Centricity, Inclusive Culture, and Adaptive Mindset.

2. **Unpack the processes**: Dive back into the P+ Process and M+ Proce~~~~ Solidify your understanding and make sure you are in sync with how w~~~~

⑦ **Help**

things.

3. **Change mastery:** Understand and apply the tools and frameworks to navigate change effectively.

4. **Share your insights:** Think back on your onboarding journey. Talk about the moments that made you think, "Wow, that makes sense!" and the lessons that stuck with you.

5. **Map out 90 Days**: Sketch out your next three months with us. What do you aim to achieve? This plan keeps you on track and in line with what we hope to accomplish.

6. **Keep growing:** See the vast resources we have. There is always something more to learn, and we will show you where to look.

7. **Focus on behaviour:** Join discussions about the changes you have noticed in your behaviour. Understand why they matter for you and for us.

🎁 What you will take away?

By the end of this session, you will have pieced together everything you have picked up. You will be ready to work the WhitewaterTx way, make a difference for our clients, and grow both personally and professionally.

1.1 Checkpoint 1 📍   do

Take a few minutes to reflect on the following prompts. Use the **Notes** functionality to capture your thought in your Learning Journal. This exercise will not only help set the stage for our upcoming session but also give you a personal reference point for your journey with WhitewaterTx.

1. **Current standpoint:** As you think about the P+ and M+ processes, what are the top three aspects or components you believe you have grasped well, and which ones are still nebulous to you?

2. **Onboarding flashbacks:** Recall one or two pivotal moments from your onboarding that sparked a strong reaction or realisation. Why do you think they stood out to you?

3. **Next steps:** Without thinking too far ahead, pinpoint one major goal you would like to achieve in the coming months with WhitewaterTx. How does it tie back to what you have learned so far.

4. **Curiosity checkpoint:** Considering the resources and knowledge available in WhitewaterTx, is there a specific area you are particularly curious about or eager to dive deeper into?

5. **Behavioural observations:** Have you noticed a particular behaviour or mindset shift in yourself since starting here? If so, what prompted it, and why do you think it's significant?

Group sharing:

Once you have taken time for personal reflection, choose one insight or realisation from your notes that you feel comfortable sharing. We will be using the group board to collectively gather our insights. This will provide an opportunity for everyone to see the diverse perspectives and experiences in our cohort, enriching our collective learning experience.

2 Leadership Principles
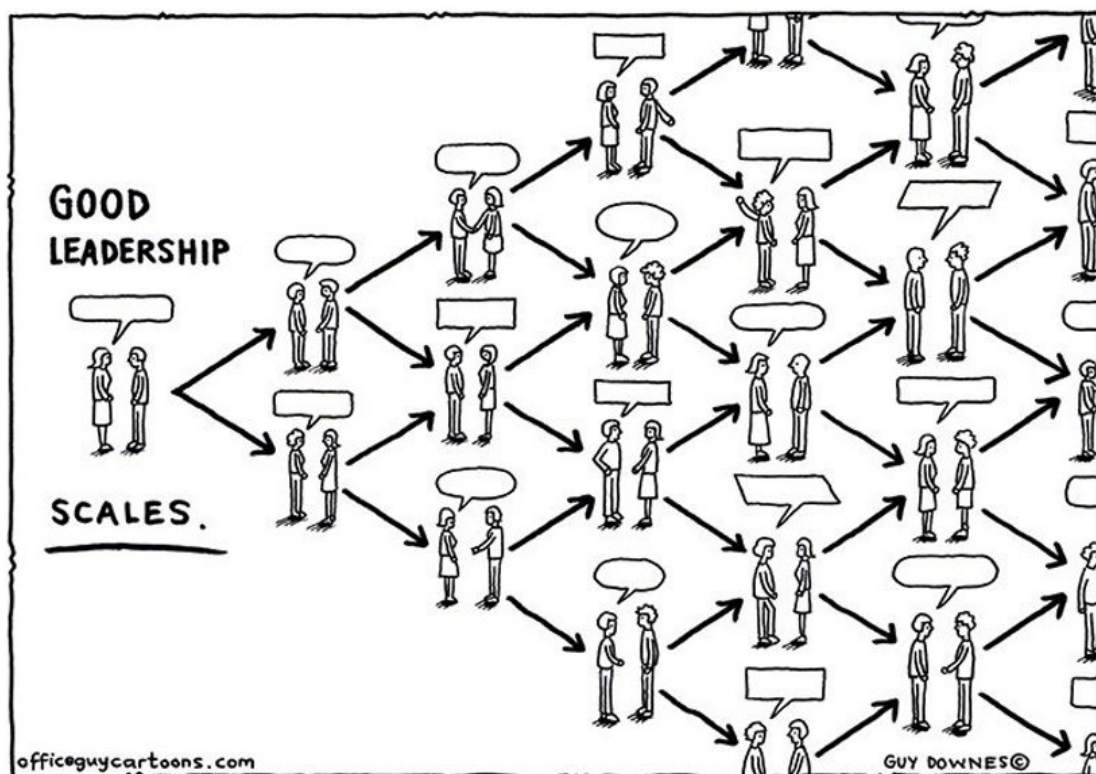
Reflecting on your learning about WhitewaterTx's foundational belief: the **power** of **dreams**. You came to understand our core leadership principles – Customer Centricity, Inclusive Culture, and Adaptive Mindset - and saw how they have steered our journey to impact the world, one dream at a time. This understanding was your first step in realizing how our clients' achievements are central to our mission.

2.1 Checkpoint 1 📍   do

Ilonka, reflect on the essential leadership principles rooted in Customer Centricity, Inclusive Culture, and Adaptive Mindset. How do you resonate with these principles during your interactions with the WhitewaterTx peers and mentors? Which of these

principles do you feel you embody most strongly? Are there any you feel you could better align with? As you consider WhitewaterTx's dedication to helping clients, how do these principles influence your approach and interactions?

On the group board, post: "Leadership principles!" followed by one key takeaway.

3 P+ Process

Having a dream is a great place to start.
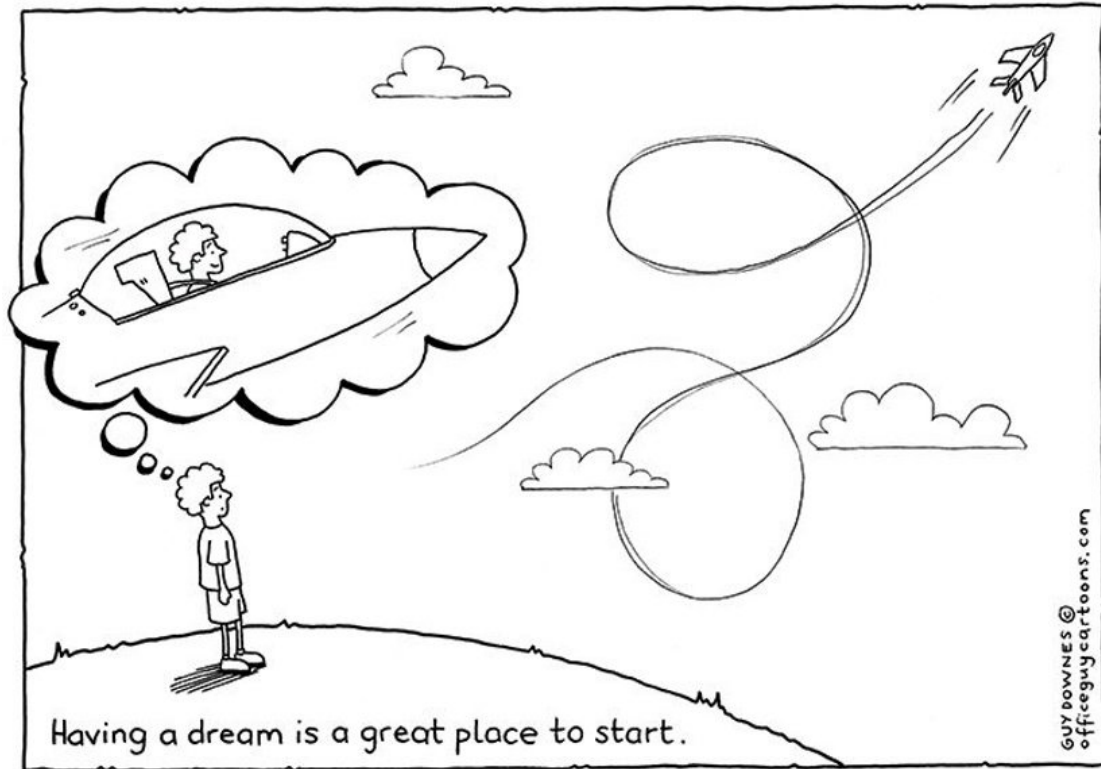
The P+ Process stands as a cornerstone in our approach to transformative change, charting a path from understanding to continuous reinvention. In this session, you will be taken on a reflective journey, revisiting each stage that has been carefully curated to drive transformation. From the initial alignments with clients to the advanced stages of mentorship and continuous improvement. Our intent is for this session to deepen your understanding, allowing you to both recap and reflect on the essence, actions, and aspirations of the P+ Process.

3.1 P1: Engagement of Strategic Owners   read

In your exploration of P1, you learned about the significance of structured interviews and how, with the expertise of Merlin, they offer valuable insights. You grasped the concept of a single point of truth and recognised the crucial role the masterplan plays in our transformative journey. Your understanding of the transition from P1 to P2 became a testament to your grasp of how strategies evolve into tangible actions.

3.2 P2: The Journey of Implementation Owners   read

Transitioning to P2, you were introduced to the process of turning strategic visions into concrete actions. Your onboarding journey highlighted the collective efforts required to enact meaningful change. The views of inclusivity, engagement, and clear strategy-to-implementation became evident as key principles. Through this phase, you came to appreciate the importance of the "Day of Change" as a milestone in our transformation journey.

3.3 P3: Activating the Whole Enterprise   read

You learned how integrating the entire enterprise into our transformational journey is crucial. You were exposed to the steps of masterplan activation, the importance of frontline alignment, and the intricacies of our Quarterly Strategic Review. Your involvement in micro-training sessions and feedback systems was instrumental in your understanding of ensuring our transformation's success.

3.4 P4: Transitioning from Guide to Support   read

Your final phase illuminated our organisational shift from active guidance to unwavering support. This is not just a change in dynamic; it is a testament to our belief in empowering teams and leaders. Through this phase, you saw how a culture rooted in collaboration, innovation, and continuous improvement is essential. Your role as an International Expert (IE) was presented as a beacon, guiding other leaders towards enduring transformation.

3.5 Checkpoint 1 📍   do

Time for an onboarding flashback:
   • Reflect on your onboarding related to the P+ Process.
   • Note 1 – 2 moments that were especially impactful or surprising. Why did they stand out?
   • On the group board post: "P+Overview" and share your "ding" moments.

3.6 Checkpoint 2 📍   do

Time to be curious:
Which aspects of the P+ process would you like to explore deeper or learn more about, especially in terms of the 'what' elements?

On the group board, post: "P+ Further Learning" and share your reflection.

3.7 Checkpoint 4 📍   do

Let's reflect on some behavioural observations:

How have you adapted the 'how' of your approach since exploring the P+ Process?

On the group board, post: "P+ Behavioural observations" and share your reflection.

4 Behaviour Change Mastery

Navigating the complexities of change requires mastering skills to handle uncertainty and ensuring well-being during transitions. Utilising the Golden Circle framework, starting with a compelling 'Why' and moving through strategic 'How' to a measurable 'What', enhances change initiatives. Recognising and harnessing one's shadow attributes can foster a productive work atmosphere. Central to this learning is embracing Stop-Start Commitments, pivotal tools that bridge understanding and action in your role as a change facilitator.

4.1 Checkpoint 1 📌   do

Which aspects of the 'Change' module resonated most with you as an IE? And how do you perceive the unique elements of the WhitewaterTx approach in comparison?

On the group board, post: "Change" and share a key learning.

5 M+ Process
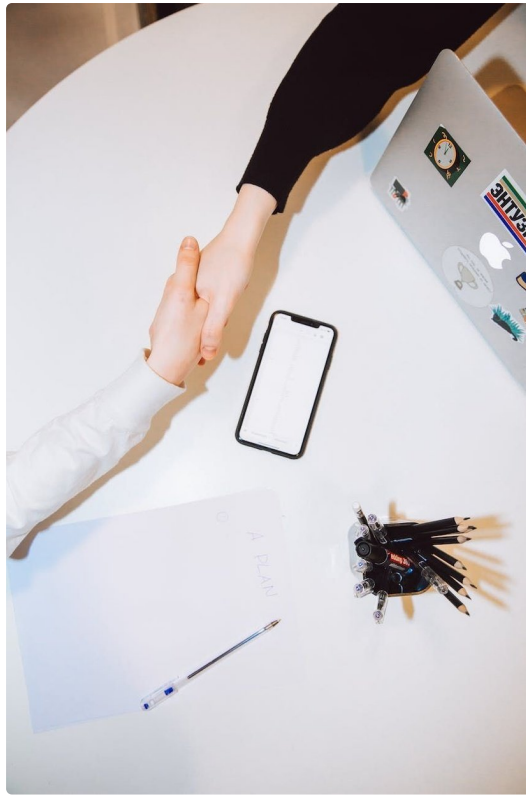
During the onboarding, we delved extensively into the M+ Process. We began with an overview, starting from our initial research phase (M0) and culminating in the celebration phase (M5).

Building strong business ties?

It's all about client engagement. The M+ Process shows IEs just how to go from a client's first hint of interest to a firm commitment. Remember, it's more than just following steps – every interaction matters.

5.1 M+Process Overview   read

Below are the key learnings for the M+Process. Click here for a full view.

- M0 – We learned how to start strong with detailed research, setting the stage for successful client interactions.
- M1 – It's all about connecting. We dove into how to run discovery sessions that uncover what clients really need and set the path for great solutions.
- Internal Option Development – Between M1 and M2, we focused on crafting the best possible solutions, tailored to what our clients might need next.
- M2 – Here, it's about teamwork. We learned how to co-create proposals, pick the best options, and handle client feedback with grace, all while keeping WhitewaterTx's methods in mind.
- M3 – This is where we shine, presenting our combined efforts and solutions to those who decide.

- M4 – Details matter. We made sure to align contracts with WhitewaterTx standards and get the right approvals.
- M5 – Time to celebrate our wins and gear up for the next phase, P1, with enthusiasm and team spirit.

A key lesson

When starting with potential clients, selling should not be the first step. It is essential to truly understand their challenges. And remember, unless they ask, no need to mention WhitewaterTx. The real goal is understanding the client's needs, setting the foundation for trust.

5.2 Checkpoint 1 📍   do

Reflect on your M+ Process learning experience: 💡

1. Identify key moments that resonated with you. Why?
2. How have these moments shaped your view on client engagement?
3. Think about a main objective linked to the M+ Process for the upcoming months.
4. Relate this objective to your onboarding learnings. Which M+ strategies will aid you in achieving it?
5. Are there specific parts of the M+ Process you are keen to delve into further?
6. Have your behaviours or mindset evolved due to the M+ context? If so, pinpoint the reasons and their significance for the process.

Note:

1. After completing these reflections, review your responses.
2. Recognise your growth and areas of curiosity and consider how you can leverage this awareness for future success with the M+ Process at WhitewaterTx.
3. Add your thoughts to your learning journal on the group board, post: "M+Checkpoint 1" and share a key learning.

6 Technology Platform

WhitewaterTx has strategically embraced a suite of tools and platforms to drive efficiency, collaboration, and growth. From seamless communication to streamlined sales processes and project management, our technological ecosystem has been tailored to our unique needs and objectives.

6.1 Technology Platform objectives   read

The selected technology platforms aim to:

1. **Enhance collaboration:** Facilitate seamless collaboration across teams and regions through shared documents,calendars, and other resources.
2. **Streamline sales processes:** Centralise and manage sales activities, leads, and opportunities to create a unified sales strategy.
3. **Improve project management:** Enable efficient tracking, budgeting, and communication within client projects.
4. **Secure information:** Employ robust security measures to protect sensitive information and ensure compliance with industry regulations.
5. **Provide continuous support:** Offer ongoing training, resources, and support to ensure all team members can utilise the tools effectively.

6.2 Application and platforms   read

We utilise a range of applications and platforms, each tailored to support specific functions within our organisation:

- **Office365:** This comprehensive suite of tools empowers seamless communication, efficient scheduling, and collaborative document editing.

- **Salesforce:** Serving as our preferred platform for sales and opportunity management, Salesforce aids in lead tracking and facilitates regional account collaboration.
- **Client Project Tools:** In addition to these, we employ specialized tools such as Xero Expenses, Team Assurance, and Miro for comprehensive project management.
- **Gnowbe:** Our cloud-based learning platform.

By familiarising yourself with these tools you can manage your daily efforts at WhitewaterTx.

6.3 Activate Microsoft 365   do

Ilonka, access the Technology Platform guide here, go the **Office 365: Your Day-To-Day Toolkit** page 4 and follow the instructions of the following sections:

1. Getting Started
2. Microsoft Authenticator: Securing Your Access
3. Outlook: Managing Communications
4. Outlook Client: Your Desktop Tool
5. Mobile Phone: Stay Connected On-the-Go
6. Updating Your User Profile: Keeping Information Current

After you have successfully activated and explored Microsoft 365, please share a post on the group board titled "**Microsoft Activation Complete**." In your post, briefly describe your experience with the setup process. This will help us confirm your activation and gather feedback to improve the onboarding experience for others.

6.4 SharePoint   do

SharePoint is our cloud-based platform that provides us with a suite of tools to manage our content, knowledge and applications to empower teamwork, quickly find information, and seamlessly collaborate across teams.

Ilonka, access the Technology Platform guide here, go the **SharePoint: Collaborating on Documents page 7** and read through the guidelines listed below:

1. How to access SharePoint
2. Navigating sites and libraries
3. Collaborating on documents
4. Managing Permissions
5. Support and more information

On the group board, post: "Reviewed SharePoint Guidelines!" and share one feature you found useful or interesting.

6.5 Salesforce   read

Salesforce is our cloud-based customer relationship management (CRM) platform that provides us with a suite of tools to manage our customer interactions and data. Salesforce is designed to help improve sales, marketing, and customer service operations by providing a single, unified view of customers.

Ilonka, access the Technology Platform guide here, go the **Sales and opportunities: Leveraging page 9** and read through the guidelines listed below:

1. Logging In to Salesforce: Your Gateway to Sales Management
2. Individuals with direct access to salesforce
3. Importing LinkedIn contacts: connecting with prospects
4. One-Off data dump: A quick guide
5. Additional tools and integrations

1. Read through the Salesforce information provided.
2. On the group board, post: "Completed Salesforce Overview!" followed by one key takeaway or feature you learned about from the guide.

You can also access the Salesforce guide here.

6.6 Project Management   do

At WhitewaterTx, we understand that effective collaboration is the cornerstone of successful client relationships. As such, we embraced industry-leading tools to streamline communication, monitor project progress, and share crucial documents, ensuring that each project runs like clockwork.

Ilonka, access the Technology Platform guide here, go the **Client project management: Efficient collaboration, page 13** and read through the guidelines listed below:

1. Overview of tools and platforms
2. Best Practices
3. How to collaborate with clients

Ilonka, read through the **Client project management: Efficient collaboration** page and do the following:

1. Identify areas or platforms where you feel you would benefit from additional information or training?
2. On the group board, post: "Client Project Management!" followed by one key takeaway or feature you learned about from the guide.

Note:

Training on Team Assurance will be provided to you in the future.

6.7 Fingerprint for success   read

As we strive for continual growth and evolution, WhitewaterTx has adopted the Fingerprint for Success (F4S) technology to delve deeper into our unique WhitewaterTx methodology. Through F4S, we aim to gain insights into our organisational dynamics, our distinctive culture, and the collective strengths that make us, the IEs, stand out. More than an introspective tool, our ambition is to leverage F4S for the benefit of our clients, enabling them to amplify their transformative capabilities and reach unparalleled performance heights.

6.8 Summary   read

The Technology Platforms guide additional resources to assist in daily operations. This includes a library of training videos and webinars on the technology stack, a FAQ section for commonly asked queries, and a glossary explaining technical terms. Should any concerns or questions arise, members can contact the dedicated support team. Additionally, there is information on security protocols, compliance standards, and data protection policies to ensure transparency and trust.

> **Well Done**   extra
> Now it is time for your 90 Day Plan

7 90 Day Onboarding Plan

🌟 🌟 Well done on completing your foundational learning!

You have gained more than just an overview of WhitwaterTx, our Leadership principles, the P+Process, behavior change, and M+Process. You have undertaken a transformative journey of understanding.

Stepping into your IE role, here is how you will channel that transformation:

- Your 90 Day Plan will be the bridge from insights to impactful actions.
- This plan will ensure the profound shifts in mindset and behavior find their daily application.
- Global weekly meetings will further foster our shared path of transformation.

Remember, the 90 Day Plan is not just a timeline — it is an opportunity. Use it to weave your client engagement (M0) learning into actionable objectives, ensuring that every day is aligned with intent and purpose! 🚀 🌱 🔗

7.1 90 Day Plan structure   read

In crafting your 90 Day Plan, you should include the following key milestones:
1. **Days 1–30:** This will be your foundational phase. Outline your goals and tasks that will help you settle into your new role, familiarize yourself with the team and the tools, and understand the expectations set for you.
2. **Days 31–60 LI Outreach:** During this phase, focus on leveraging LinkedIn for outreach. Set targets for the number of connections you aim to make, potential clients you want to engage, and any webinars or training sessions you want to attend to refine your outreach strategies.
3. **Further reading/education:** Dedicate time for self-improvement. List down books, articles, online courses, or workshops that you want to explore to deepen your knowledge in your field and enhance your skills.

This plan is a roadmap for your first three months, so make it as detailed and actionable as possible.

Let's look at Days 1 –30.

7.2 Days 1–30   read

#1 Revisit your LinkedIn profile
LinkedIn (LI) offers a wealth of trainings online about etiquette, posting, commenting, building pages/presence. Use it.

- Your personal brand: Upgrade to Premium, get a profile makeover.
- Proliferate the WhitewaterTx brand: Does your profile reflect your engagement with Whitewater?
- Positioning: Does your experience represent you well as Reinvention/Transformation Consultant?
- Use AI: LI has an AI function helping you to write about yourself based on the work history provided.

#2 Check and start segmenting your contacts and activate

- Existing contacts: reconnect for a call to catch up/sync. Identify the transformation team and the leader.
- Interesting accounts: think in teams to be activated (>50% of prospects contacted will verify via peers).
- Contact 4-6 interesting people/contacts per week to generate a stream of M0 meeting candidates.

#3 Visit WWTx colleagues LI pages

- Like their posts and start with comments.
- Master the basics: likes, comments, hashtags, @mentions. LI values people fostering a discussion and engagement.
- Pull others in via @mentions.
- If you have never commented, start with "shoulder padding" like "thanks for sharing", "good point", etc.
- Integrate keywords that others use to search
- Next step is to start sharing your expertise and point of view.

#4 Join interesting groups:

- By management level, industry, topic, etc.

#5 Bring the contacts into Salesforce (CRM) – follow up is key.

7.3 Days 31–60   read

Start by researching and expanding into compelling companies within your Communities of Interest (CoIs). Instead of merely sending connection requests, utilize your existing network for warm introductions. Once connected, actively engage by identifying and following potential prospects. Remember, it's essential to acknowledge and give credit for content that has added value to your knowledge. Engagement should be meaningful; avoid immediately following up a connection request with a meeting proposal. If you've previously posted content, pinpoint key topics where you can offer insights. From there, craft an "editorial calendar" to structure your contributions.

7.4 Days 61–90   read

Ilonka, to maximize your impact on LinkedIn (LI), it is crucial to understand and harness the LI algorithm's content prioritisation. This will not only enhance your reach but also bolster your reputation. By coordinating your postings, comments, and likes in a unified

manner, the collective efforts can significantly elevate the ranking of your content. Prioritized posts have the potential to extend far beyond your immediate network, making their way into others' feeds. This visibility is invaluable during peer validation phases.

While originality is essential, mastering the art of "artful plagiarism" can be beneficial. The digital world is brimming with compelling content. Instead of solely relying on well-known sources like McKinsey, consider sourcing insights, data, or surveys from lesser-known research entities. These "nuggets" often captivate audiences. Whenever you draw from others, always credit the original authors. Building upon their work not only showcases your expertise but also highlights the proficiency of WhitewaterTx.

7.5 Further resources and reading   read

We are excited to announce a comprehensive introductory session coming up in early November. As you delve into the world of social media, adopt a student's perspective; the potential is vast. Begin by mastering LinkedIn (LI), then expand your horizons to platforms like Facebook and Instagram. For insights on using LI effectively and to witness professionals in action, there are several intriguing personalities to follow. Interesting people to follow:

Dean Seddon: https://www.linkedin.com/in/deanseddonio/

Dave Brock: https://www.linkedin.com/in/davebrock/

Steve Nouri: https://www.linkedin.com/in/stevenouri/

Good reads:

1.
2. How to get a meeting with anyone, Stu Heinecke. Creative tactics when you don't have a personal relationship.

7.6 A good read: How to Talk to Anyone   view

https://www.blinkist.com/en/books/how-to-talk-to-anyone-en

7.7 A good read: How to Talk to Customers   view

https://www.blinkist.com/en/books/the-mom-test-en

7.8 A good read: How to get a meeting with anyone   view

https://youtu.be/NxZXK2xRCNs?si=ptRAp93o0LI-b3XS

7.9 Further learning and development opportunities   read

Set aside some time for these valuable reads. Remember, you're learning at WhitewaterTx does not end here. Throughout your 90-day journey, you will receive

Gnowbe invitations for learning, further enhancing your ability to support both strategy and implementation.

In the coming weeks, expect an invitation to an F4S workshop. I suggest you weave this into your 90 Day Plan. When you participate in the F4S assessment, you will dive deep into your motivations, gain insights, and elevate team culture and engagement. It's your chance to set and align your goals for the upcoming three months.

7.10 Summary   read

In this session, we provided you with a comprehensive framework for your 90-Day plan, setting you on a clear path as you start your role as an International Expert in Transformation. Stay tuned for a detailed introduction session coming this November 2023.

> **Well done on your commitment!**   extra
> Now it is time to focus on your 90 Day Plan.

About 6. Integration

Ilonka welcome back!

The Integration module serves as a cohesive reflection tool, synthesising foundational learnings from the WhitewaterTx Overview, P+ and M+ Processes, and behaviour change modules. In unifying these components, the guide also introduces you to the WhitewaterTx Technology platform and lays out a structured blueprint for your 90-Day onboarding Plan.

Dive in to seamlessly blend your acquired knowledge and set a clear course for your onboarding journey.

About Ilonka Malan

Ilonka, a seasoned Learning Experience Designer, transitioned from global financial services to an independent specialist, specialising in instructional design. With expertise

in micro-learning and learning experience
platforms, she is renowned for designing
tailored, interactive learning.

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