



Learning, for self & others, to manage the anxiety that comes with change. Leading the team through the unknown and doing it together.

Proposal- 15th June 2018

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THE MANDATE

The Situation

IDFC is on a path to sell either a part or the complete Asset Management Business. This news broke about two months ago. There is not much clarity yet on which parts of the business will go or whom the buyer might be. Regular mentions of this and opinions etc through traditional and social media are keeping the team and their clients and partners in a state of the unknown.

Understandably, this is leading to a great deal of insecurity. Specially the senior members of the team. They wonder “What will happen to my role?” “Will I survive in the new scheme of things?” “Will the new buyer have the same values & culture?”.

Implications of this news are hurting business. Sales volumes have dipped. A lot of clients are putting investments on hold. Distributors, Channel partners & HNIs are becoming tough to convince. The sales team is facing daily struggles.

While all this happens, the sales team leaders are meeting at the end of June for the quarterly reviews. We have been asked to come in on the second half of the 28th of June and the first half of the 29th of June to work with this group. Our target audience of 20 includes about 16 leaders from the sales team whom we had worked with last year and about 4 more peers of the sales head Gaurab. The CEO will also be a part of this group.



THE MANDATE

It is very important for the organization to address the concerns of this set of audience. With uncertainty & volatility, there is a strong need to work with the target audience on:

- Ability to deal with the uncertainties and anxieties of self and team members
- Work on their feelings while embracing this change

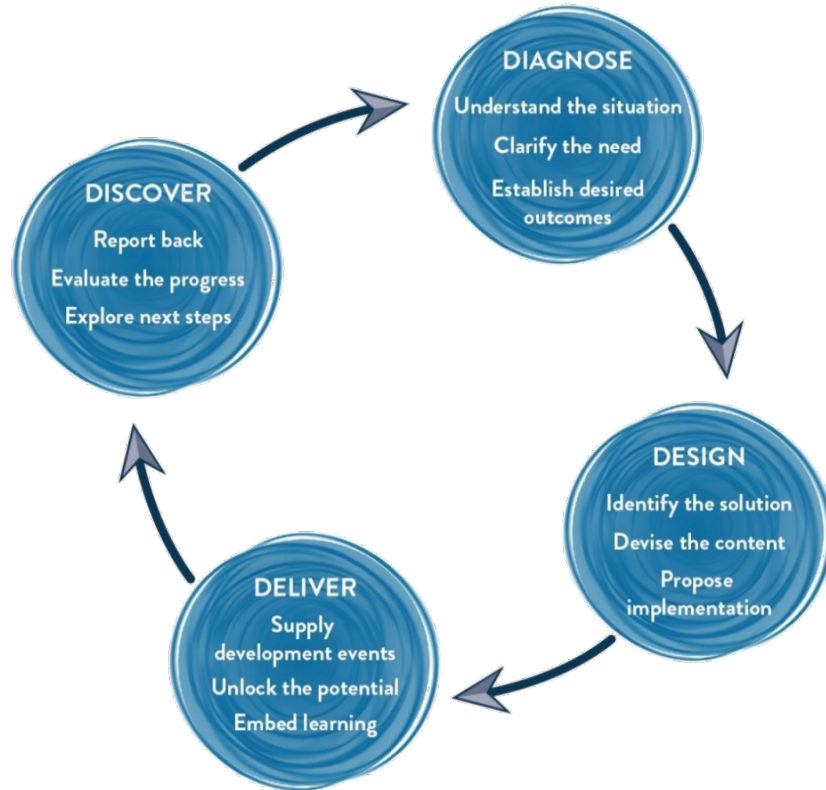
The Need

Maynard Leigh is required to create an experience that revolves around supporting the leaders to deal with change in a more efficient way and embrace the change without worrying. This intervention should be energizing, not complicated and work on their resilience while keeping the core message intact.

Since this audience has a vital role to manage people within the organization, through this intervention, the target audience needs to :

- Build resilience within themselves and team members for the next level of changes
- Keep a positive outlook during this phase of unknown & change
- Acknowledge and share their apprehensions and fear openly
- Become an inspiration for all the people they are leading
- Use this VUCA situation to help self & others learn and build strong patterns of peak performance

THE APPROACH



The Methodology

We use Interactive theatrical exercises along with Psychological and L & D tools

THE DIAGNOSIS

In order to be able to share a relevant design and learning outcomes, we conducted a Diagnosis with the target audience and Learning & development stakeholders. We delved deeper into the situation faced by the business and the participants:

Our curiosities were around:

- Their current feelings, state of mind around the news
- Their anticipated fears and anxiety: What do they think will happen now?
- Their expectations from the organization- what should they be doing differently?
- How best should they manage this change? What will enable them to truly accept it?
- Gathering examples around the current scenario

We foresee six phone conversations of 30 minutes each with:

- **The CEO**
- **Sales Head**
- **One peer of the Sales head**
- **Three team members reporting to the sales head**



THE DESIGN



Post the diagnosis, we get into the design phase of the learning intervention.

Design Customization: The consultant will design the final objectives and customize the content of the learning intervention. Modules of the workshops are designed, activities are mapped to the examples, new handouts are drafted based on the content.

TENTATIVE LEARNING OUTCOMES

The objectives are based on **think + feel + act = performance**

Based on research done in instructional design that points to the fact that wholesome learning occurs when cognition (thinking) aligns with emotion (feeling), which then need to align with the sensorial or kinesthetic (new actions or what a person does differently after experiencing the learning)



- If I am inspired, I can get through this
- I can share my doubts & fears in the open
- I can express all my emotions freely
- I have lived through change and I have the tools to deal with it.



- More comfortable in expressing emotions
- Bigger, bolder and better
- Equipped to handle change
- Ready to give peak performance



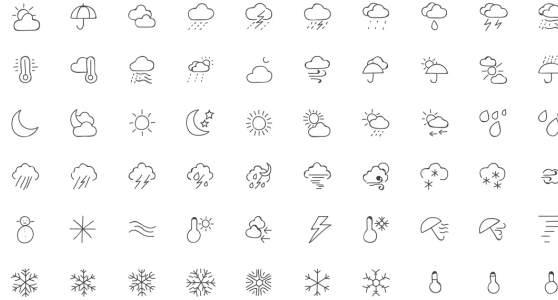
- Inspire themselves and others
- Deal with change and next level of announcements
- Keep a positive outlook throughout the change

DESIGN: THE FLOW



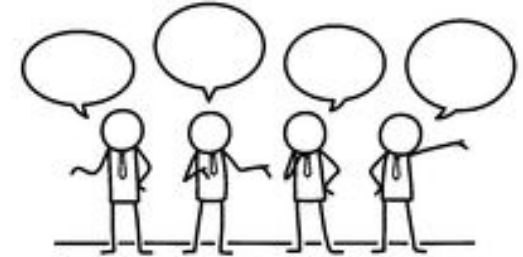
Self Patterns

We begin by looking at our own functional and dysfunctional patterns of operating when changes hit a team



The environment

After taking a look at ourselves, we focus on how we respond to environmental stimulus and where we place our attention as well as locus of control



Relationships & Psychology that enhance performance

In times of flux, what kind of relationships & patterns help people sail through?

TENTATIVE DESIGN

A one day (Two half days) intervention with 20 participants with 1 consultant

Narrative	Session	Session details	Methodology
Opening up, trust and rapport with the participants	Landscapes walk / opposite instructions / crazy act / tic tac toe	A warm up where participants walk through different imaginary landscapes (a changing / shifting world). Through this they get in to a play state and receptive to learning. At this point its important to get them into a state of play in order to work with the resistance that's building up	Theatre exercise
Clarity on the learning objectives	MLA introduction and Context Setting	Establishing the need for this intervention. Response to a VUCA world is shared with them to create a buy in for the remaining workshop. Establishing that the context is to equip people to deal with transitions and not to send them any covert signals for an incoming disaster	Facilitator Led Discussion
Inner patterns			
In a play state, we discover a little about our own patterns	Machines / Neutral bench / freeze frames	We create a highly engaged atmosphere where leaders/team members can gauge their current state & then talk about key excellence, leadership and cross-functional team co-ordination attributes like listening, enthusiasm & energy, 'yes, anding', building an internal service culture, being proactive especially during times of flux & change	A high adrenalin team game, to check team's behaviors
A space to express the underlying feelings that have been lingering	Pillow fight / Rant	Participants are given the space to express their fears, anxieties, disappointment and anger	Game based emotional expression
Distinguishing between characters that take ownership & those that don't	Victims / choosers	An exercise where people identify their victim voices and the victim voices of those around them. Participants take a sneak peak at their functional ad dysfunctional characters and order them in the spectrum to victim → chooser voices	Psychodrama & Group work
Response to environments			
Once we have seen the impact of irrational fears and feelings, we are in a state to be able to rationalize our own reality	CBT	Breaking a situation down to the trigger → feelings → thoughts and actions. So that one is better able to manage one's emotions no matter what the environmental stressor. This is followed by a group discussion on small case studies from companies where mergers have occurred and benefitted the folks	Psychological insight creation
Life's a drama. What's the current script of your story looking like at IDFC? Each individual gets to explore the roadblocks and use image work to see how they can take charge and transform these problems	Transforming Problem Situations	Experiential creative problem solving, generating multiple perspectives to look at our problems along with an action plan and a support network	Scene work

TENTATIVE DESIGN DAY 2

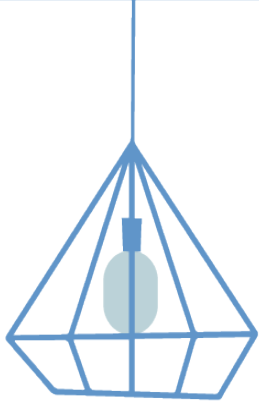
Narrative	Session	Session details	Methodology
Psychology that enhances performance			
But, what's in it for me? For my team? Why should I be a chooser?	Motivation for peak performance	This is the non-moral science answer to why peak performance during times of change can be a game changer for career paths.	Sports Psychology
Relationships that enhance performance			
Taking a look at what relationships mean to us as a team and why are they important to forge during critical times of change	Tai Chi	An exercise that gets us in touch with the message that "if we put our absolute attention on others, the transactions will take care of themselves" It also takes of the 'intimacy' aspect of the trust formula	Theatre Exercise
What can I do to keep my people Engaged?	VIDI	When leaders work on making people Valued, Involved, Developed & Inspired they will be more engaged. We share a pack full of ideas on how to do that.	Participant led exercise
The group will get to practice their ability to pay attention & listen by answering often asked questions, such as, "what's going to happen now?"	Radio dial: Rapid fire questions	In pairs we learn to communicate even in times when we may not have the clarity the other desires. The facilitator stands in the middle of a group and fires questions (in style of distributors, HNIs) participants have to respond with what they feel is the most authentic & appropriate response	Pair work
Putting it all together and contracting on 3-4 key behaviors that the team will showcase starting this point	Make each other shine: Group Action planning	Putting all the experiences together and to create outstanding performances. The theme will be..."be a player" and the group will then use these outstanding performances to agree upon certain productive behaviors that the team will showcase	Improv performances & trust contracting
	'Indradhanush' / Alan Alda	We end the day on an inspirational note, with a poem that the team can share	

YOUR INVESTMENT

<u>Diagnose & Design (For the whole Intervention) – ONE TIME COST</u>		
One Day Diagnosis & Design (Internally we might take 1.5 days, we are however only going to bill for 1 day)		INR 75,000/-
<u>Delivery (for 20 leaders)</u>		
<u>Activity</u>	<u>Investment</u>	
Professional fee for In it together workshop	INR 75,000 per day per consultant X 2 days X 1 consultants	INR 1,50,000/-
Learning materials, folder, prop usage and transport	INR 500 per participant X 20 participants	INR 10,000/-
VIDI Do-it-now cards	INR 350 per pack X 20 packs	INR 7000 /-
Total Investment for 20 Participants		INR 2,42,000/-
Total investment per participant (approx.)		INR 12,100/-

COMMERCIAL T&C

- ❖ Client is responsible for providing venue, conference facilities, AV equipment.
- ❖ Travel outside Delhi NCR - Air, stay & airport/ venue cab transfers to be taken care by the client.
- ❖ Travel inside Delhi NCR - at Rs. 12.00 Per Km.
- ❖ Not inclusive of applicable taxes (GST @18%).
- ❖ A commercial contract will be signed before the execution of the project.
- ❖ 50% of cancellation fee will be charged on any cancellation or postponements that occur within 3 to 20 working days of the confirmed date of delivery.
- ❖ 100% of cancellation fee will be charged on any cancellation or postponements that occur within 0 to 2 working days of the confirmed date of delivery.
- ❖ The above commercials are valid till the 31st March 2019
- ❖ Contracts, legal & accounting paperwork (including billing & payments) will be in the name of “Life Strategies Humancare Pvt. Ltd.”



We love alternative ways of setting up a workshop! Creating an atmosphere where the participants feels absolutely comfortable and yet challenged. In this workshop, the use of theatre, team games and experiential methodologies are essential ingredients, hence we'd require ample place to move around and make noise. Please book a space with ample natural light (Yes, we want sunlight streaming in) and no fixed furniture for the participants to work with one Maynard Leigh consultant.



THE THINGS REQUIRED AT THE VENUE

For the workshop, we will need the below mentioned:

- **UPS Power Back-up** for Laptop, LCD projector & Laptop speakers
- **External speakers** (for laptop connectivity). The external speakers should be loud enough to play music for the team.
- **Two White board** & White board markers (2 blue, 2 black, 2 green)
- **Two Flip charts** and Flip chart stand with suitable clips
- **Colour pens** (Normal sketch pens - about 30)
- **Notepads and pens** (for participants)
- **Blu Tac** (This substance is used to stick things, posters or paper on the wall)
- 40 A4 Size normal and **drawing sheets**
- 2 tables for the consultant(one will be used for the projector and the other for keeping the handouts)

For further information please connect with:

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