



# Mini-Business School

**October 6-9, 2019**  
**Hyatt Regency O'Hare**

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

<b>Sunday, October 6, 2019</b>	
<b>Welcome and Introductions</b>	
5:30 pm	<b>Registration opens</b>
6:30 pm	<b>Reception</b>
7:00 pm	<b>Welcome and Dinner</b>
7:45 pm	<b>Getting to Know Your DTA Leadership Institute Colleagues and Instructors</b> <ul style="list-style-type: none"> <li>• Review the DTA Leadership Institute agenda</li> <li>• Engage with other participants about their goals for participating in the Institute</li> <li>• Participate in a team building activity</li> </ul>
8:30 pm	<b>Adjourn</b>
<b>Monday, October 7, 2019</b>	
<b>Theme: Personal and Interpersonal Skills for Leadership</b>	
7:00 am	<b>Breakfast</b>
7:45 am	<b>1.1 Actualizing Your Leadership Potential: The Myers-Briggs® Type Indicator and Leadership</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Assess one's personal preferences for taking in information and making decisions</li> <li>• Describe one's unique leadership style using the MBTI model Step II Interpretative Report</li> <li>• Identify action steps to improve one's contributions as a leader and team player in the work environment</li> </ul>
9:45 am	<b>Break</b>
10:00 am	<b>1.2 Building High Performance Teams</b> (Dr. Jim Walling) <ul style="list-style-type: none"> <li>• Apply MBTI Type theory to team dynamics</li> <li>• Describe the 5 characteristics of highly functional teams</li> <li>• Identify ways to make team meetings more productive</li> <li>• Develop action steps to improve your skills for engaging individual members and motivating the entire team</li> </ul>
Noon	<b>Lunch</b>
12:45 pm (includes breaks)	<b>1.3 The 9 Virtues of Exceptional Leaders</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Identify personal purpose and values as leadership motivators</li> <li>• Describe how to create habits (virtues) that contribute to the success of the business</li> <li>• Discuss the application of virtues (e.g., courage, hope, justice) to specific leadership responsibilities</li> </ul>
2:45 pm	<b>1.4 Coaching Employees to Improve Productivity and Results</b> (Dr. Jim Walling) <ul style="list-style-type: none"> <li>• Diagnose the causes of performance problems</li> <li>• Apply techniques for giving feedback that is specific, timely, and focused on behavior change</li> <li>• Create a plan to involve employees in developing solutions to improve their performance</li> </ul>
5:00 pm	<b>Adjourn</b>
6:30 pm	<b>Reception and dinner</b>
<b>Tuesday, October 8, 2019</b>	
<b>Theme: The Leader as Strategist and Change Agent</b>	
7:00 am	<b>Grains and Brains (Breakfast and Dialogue)</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Guided discussion about how participants will apply learning from Day 1</li> </ul>

8:00 am	<b>2.1 Applied Strategic Planning</b> (Dr. Jim Walling) <ul style="list-style-type: none"> <li>• Apply the four-frames model to understanding businesses</li> <li>• Understand the process for developing an applied strategic plan</li> <li>• Describe how to integrate human and financial resources into execution strategy</li> </ul>
10:15 am	<b>Break</b>
10:30 am	<b>2.2 Winning Negotiation Strategies</b> (Dr. Jim Walling) <ul style="list-style-type: none"> <li>• Understand the stages of negotiation processes</li> <li>• Identify barriers to bargaining and how to overcome them</li> <li>• Practice a model for win-win negotiation</li> </ul>
Noon	<b>Lunch</b>
12:45 pm	<b>Winning Negotiation Strategies, continued</b>
2:15 pm	<b>Break</b>
2:30 pm	<b>2.3 Leading Change</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Assess one's personal style of approaching change</li> <li>• Develop strategies for getting others committed to the change process</li> <li>• Describe practices to manage one's emotions when under pressure</li> </ul>
4:15 pm	<b>Break</b>
4:30 pm	<b>2.4 Peer Coaching, Round 1</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Apply a 3-phase model for group problem solving</li> <li>• Receive feedback from peers on real challenges/opportunities that you face at your company</li> </ul>
5:45 pm	<b>Adjourn</b>
6:45 pm	<b>Dinner</b>
<b>Wednesday, October 9, 2019</b> <b>Theme: The Leader as Facilitator and Innovator</b>	
7:00 am	<b>Grains and Brains (Breakfast and Peer Coaching, Round 2)</b> <ul style="list-style-type: none"> <li>• Guided discussion about how participants will apply learning from Day 2</li> </ul>
8:00 am	<b>3.1 Financial Management for Nonfinancial Managers</b> (Dr. Tom Smith) <ul style="list-style-type: none"> <li>• Understand the balance sheet basics and P&amp;L responsibilities</li> <li>• Apply standard techniques of analysis, including overhead, capital budgeting, cash flow, valuation, and risk analysis</li> <li>• Explain how to develop budget projections, performance goals and incentives and use diagnostic and interactive control systems to achieve those objectives</li> </ul>
10:15 am	<b>Break</b>
10:30 am	<b>Financial Management for Nonfinancial Managers, continued</b>
Noon	<b>Lunch</b>
12:45 pm	<b>3.2 Creativity and Innovation: What Box?</b> (Dr. Karl Haden) <ul style="list-style-type: none"> <li>• Examine and discuss characteristics of innovative companies</li> <li>• Practice techniques and tools to promote your and your team's creative thinking</li> <li>• Describe approaches for producing, evaluating and implementing new ideas</li> </ul>
1:45 pm	<b>Wrap up and Next Steps</b>
2:00 pm	<b>Adjourn</b>