



JUNE – AUGUST 2020

THE STRATEGIC LENS

Strategic Thinking for Individual and Institutional Impact

Part of an ERG Leadership series for ERG members, leaders, and diversity champions

ELEVATE is a partnership of





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THE STRATEGIC LENS

Strategic Thinking for Individual and Institutional Impact

Executive Summary

The Strategic Lens shifts your thinking in focused and systematic ways. The tools from this course provide practical, yet straightforward frameworks that guide your thought processes in methodical ways. Strategic thinking improves your future state and can work beyond institutional levels; it can help you at the individual level—and on a daily **basis**. The course provides fresh approaches to maximize opportunities, minimize risks, and focus your lens toward strategic success. Course topics include:

- Foundations And Contexts For Strategic Thinking
- Key Elements To Shift Your Thinking Toward More-Strategic Approaches
- Visual Views Of Key Methods That Lead To Visionary Directions
- Systems That You Can Apply At The Individual Level



Learn more at www.ergeconomy.com



What makes this program

UNIQUE

Tailored: Specially customized for ERG leaders and stakeholders

Tailored

Practical: Leverage immediately applicable tools from each course

Practical

Experiential: Learn beyond lectures and from multiple, interactive methods

Experiential

Proven: Developed by the same Design Team that developed the *ERG Economy* (Now in its second edition—please see www.ergeconomy.com to obtain a copy of the book), as well as the National ERG Summit & Leadership Forum.

Proven

About Us

Elevate ERG Leadership Series



Powered by Elevate

We offer a wide range of tailored ERG leadership courses. This course is one amongst a larger series. The ERG Leadership Series tailors leadership development for Business & Employee Resource Groups (BRGs & ERGs), representing among the most engaged, passionate team members who both volunteer and inherently build diverse and inclusive talent pipelines.

ELEVATE

Elevate is a partnership of the California State University—Fullerton, University of California—Riverside, University of California—San Diego, Spectrum Knowledge, and the University of California Office of the President—MESA. One unified phrase embodies both our mission and vision:

PURPOSE + PEOPLE = PURPLE.

Elevate helps you define, refine, and align your purpose with your organization's purpose.



Learn more at www.ergeconomy.com



Date & Location

Charlotte, NC

JUNE 25-26, 2020
9am – 4pm ET
TIAA, Outer Banks Room,
8500 Andrew Carnegie Blvd.,
Charlotte, NC 28262

Rockville, MD

JULY 27-28, 2020
9am – 4pm ET
Choice Hotels International, Room
450 A, B, C, 1 Choice Hotels Circle,
Suite 400, Rockville, MD 20850

Chicago, IL

AUGUST 13-14, 2020
9am – 4pm CT
In Chicago
(more info to follow)

Registration Information

Who Should Register: These courses are designed specially for the dedicated members of Employee Resource Groups, also known as Business Resource Groups, Affinity Groups, and Employee Network Groups.

Early Bird: Register **60 days before the start of your chosen class date** and your registration will include a seat at a Virtual ERG Advising Session on Friday, November 20th from 11:00 am—12:30 pm PT.

Tuition: \$1600 (Meals and Materials Included)

Team Advantage: Send at least 6 from one company and receive \$100 off per person—a total savings of \$600 or more!

Government rate: \$1500 (Meals and Materials Included)

Government Team Advantage: Send at least 6 from one agency or organization and receive an additional \$50 off per person—a total savings of \$300 or more off the normal rate!

Ask your leaders and managers to invest in your organization by supporting your leadership and professional development.

To register, go to www.ergeconomy.com/courses
For more information, contact us at info.411@spectrumknowledge.com



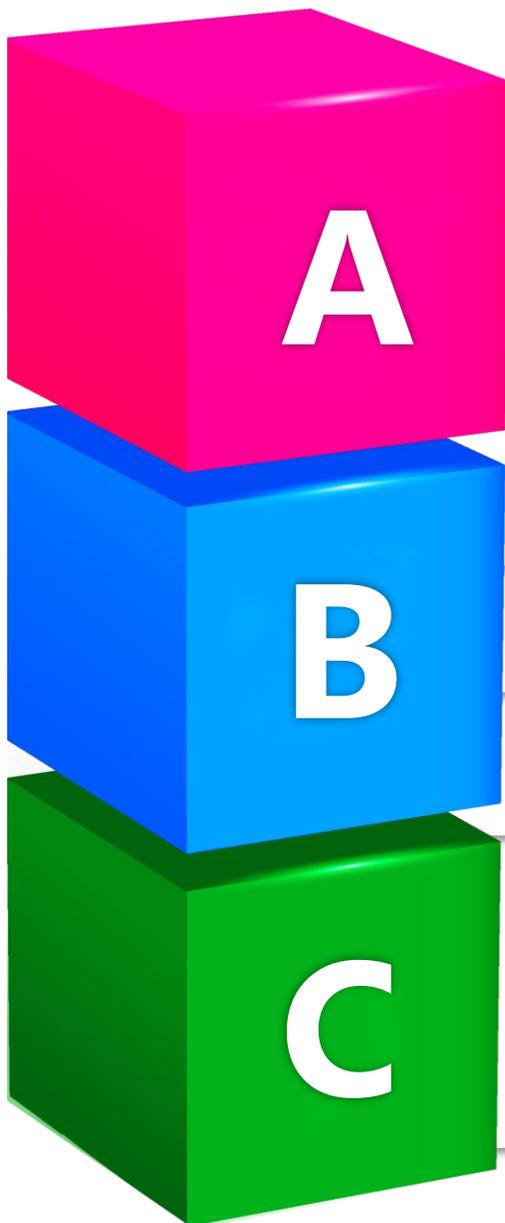
Register at www.ergeconomy.com/courses



Additional information



Visit www.ergeconomy.com



Agenda

www.ergeconomy.com/courses/#aot-tsl



Bios of Faculty

www.ergeconomy.com/bios-of-faculty



Book Information

www.ergeconomy.com/erg-economy-2nd-edition



Benefits of this Program

www.ergeconomy.com/#benefits



Courses (Upcoming)

www.ergeconomy.com/courses-upcoming





Agenda



Context Circles

What it is

A visual tool to build context in a rapid and systematic manner

Application + Value

1. Develop situational and environmental awareness
2. Provide a global view



Directional Context

What it is

A tool that helps us look in directions we may not have otherwise, in order to build context

Application + Value

1. Building context
2. Gathering crucial information
3. Pre-planning



The 5 Ps Pyramid

What it is

A tool that provides systematic analyses to a given situation. It is a shortened alternative to McKinsey's 7S model

Application + Value

1. Assess a project in a structured way, before, during or after
2. Expand strategic thinking possibilities



H.I.L.I. Model

What it is

A tool to help ERGs optimize resources by leveraging their exponential properties through structured efforts that generate maximum value and results

Application + Value

1. Increase impact and results
2. Decrease input and effort needed
3. Maximize return-on-investment (R.O.I.)



The Contingency Diagram

What it is

A tool that uses reverse logic to find practical solutions. By thinking of all the ways to make a situation worse, you gain insight into how to improve it

Application + Value

1. Look into the future and designing actions that can be taken to shape the future—reducing uncertainty
2. Consider different future events and their impact on the strategy
3. Identify worst and best-case scenarios



Plus/Delta

What it is

Simple evaluation process that is quick to use and provides ideas for improvement

Application + Value

1. Evaluate improvement areas for a team, committee, staff meeting, a project or any process



Force Field Analysis

What it is

A method to identify the forces for or against a desired change so that a decision can be made on a plan of action

Application + Value

1. When a team wants to find out what is (or probably will be) driving, slowing or stopping change from occurring



Project Statement

What it is

A tool that defines the current state, its impact and the desired state

Application + Value

1. To keep an individual or team from jumping to a solution before the issue/need is stated
2. Creating a vision statement
3. A way to communicate the issue/need to those outside the team





Bios of Faculty



Vu H. Pham, Ph.D.

Chair of Elevate

As the Chair of Elevate, Vu H. Pham, Ph.D. works with dozens of organizations from the Fortune 500 to government and non-profit agencies. Elevate is a partnership with the Center for Executive Development at the University of California, San Diego's Rady School of Management, as well as Cal State Fullerton and UC Riverside's Career Centers. The Elevate Program boosts organizational performance and strategic effectiveness through interactive training and data-driven research. Dr. Pham's works have been featured on multimedia venues from CNN, MSNBC, Forbes, The Los Angeles Times, Voice of America, KSCI International TV, and Strategic Innovators. He has published several books and numerous articles, while donating countless hours and fundraising for non-profit organizations.



Stephanie Piimauna

Vice Chair of Elevate

Stephanie Piimauna is the Vice Chair of Elevate, which is a partnership that includes the University of California—San Diego, the University of California—Riverside, California State University—Fullerton, the University of California Office of the President—MESA, and Spectrum Knowledge. She is veteran of the hospitality industry for over 25 years and currently serves as an executive at one of the largest international Entertainment, Gaming, and Hospitality companies in the world. She has thrived in the area of Learning and Development for most of those years and continues to follow her passion for developing leaders. In addition, she provides cutting-edge diversity training and oversight of the company's many employee resource groups through her leadership in Diversity and Inclusion. Stephanie also manages company groups that are involved in various environmental, philanthropic, and volunteer initiatives.



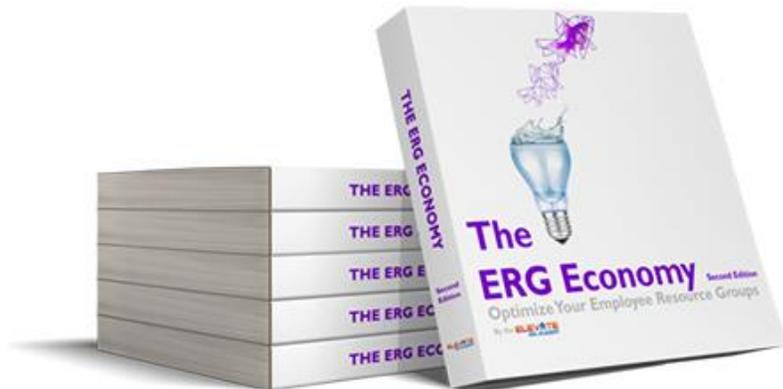
Andres Gonzalez

Andres Gonzalez has worked in the non-profit sector for over 20 years. He has been instrumental in creating culturally and linguistically competent programs. He serves as the Vice President, Chief Diversity Officer at Froedtert & Medical College of Wisconsin located in Milwaukee, WI. He provides direction to the Office of Diversity & Inclusion where he leads Diversity & Inclusion strategic initiatives that include: Community Engagement, Diversity Action Teams (DATs), Diversity & Cultural Competence Education, Emerging Markets Initiative, Health Equity, Inclusion Advocates, Language Services, Leadership Development, Supplier Diversity, and Talent Acquisition.





Book Information



Designed by the Authors of ERG Economy!

The **ERG Leadership Certificate Series** is design by the **Elevate Team**, which produced the **ERG Economy ToolBooks**.

"The ERG Economy challenged me to continue building collaborative ERG organizations and harness their creative energy to support our organizational objectives."

- Ondra Berry | Senior Vice President, Talent and Performance | MGM Resorts International

"The ERG Economy training is the best I've seen in my career as a D&I professional. The training is fun and interactive and provides a host of valuable tools for ERGs to reach the next level."

- Sarah Helm | Head of Diversity and Inclusion | Discover Financial Services

"The ERG Economy provides GPS-like guidance to move you from merely sustaining to success as an ERG leader or Diversity professional."

- Emanuel Brady | Vice President and Chief Diversity Officer | The Raytheon Company

"Clear, concise and practical. Based on core business principles, The ERG Economy ToolBook provides a framework to unleash the human potential of your ERGs."

- Christopher Rowland | Global Diversity Officer | The ManpowerGroup

"This vital book contains the essential elements for building ERGs that launch great careers and support high business performance. It's a must-read for ERG leaders as well as business leaders seeking to maximize the benefits they derive from the ever-evolving ERG economy"

- Joseph Santana | Chairman of the Institute for Corporate Productivity (i4cp) Chief Diversity Officer Board

"Congratulations on the second edition of ERG Economy. Our ERG leaders are looking forward to leveraging all of the great work. The first book was invaluable in helping us move our ERG strategy forward."

- John Basile | Vice President | Chief Diversity & Inclusion Officer | Fidelity Investments

"This book innovatively distills the key techniques ERG leaders need to succeed in a simple visual narrative – read and apply it immediately!"

- Tujuana B. Williams | Vice President & Chief Diversity & Inclusion Officer | Fannie Mae

"This book is a vital resource to organizations for how to optimize the value proposition ERGs can offer the business, employee experience and the leaders who lead them."

- Cheryl Wade | Head of Diversity and Inclusion | Booz Allen Hamilton

The ERG Economy book provides a simple and clear path to help ERG leaders move their programs forward with a fresh, thoughtful and creative approach."

- Mike Serbring | Head of Inclusion and Diversity for the Americas | MUFG Union Bank, N.A.





Benefits of this Program

How and Why This Program Benefits You and Your Organization

As ERG Leaders and Members, you invest your passion for people and the organization as volunteers. Ask your executive sponsors and D&I Team to support your participation so that you can increase this virtuous cycle of performance.

People: Dedicated, Engaged & Fact-Focused



- +19% boost in retention
- +57% better collaboration
- +58% boost in ability to correctly price stocks and focus on facts

Productivity: Cognitive Diversity & Market Advantage Innovation



- +70% increased success in new markets
- +40% more market share
- +42% additional patent citations for mixed-gender teams than single-gender teams
- 15x sales for most-diverse vs least-diverse companies
- +9% for every 1% increase in corporate ethnic populations (up to the rate represented in the general population)

Performance: Financial Impacts



- +35% financial returns (above the industry means with ethnically diverse companies)
- +15% financial returns (above the industry mean with top-quartile gender diverse companies)
- +26% outperformance (of large companies with at least one female board member)

American Sociological Association, "Diversity Linked to Increased Sales Revenue and Profits, Customers," April 3, 2009. | CEB, "Driving Retention and Performance Through Employee Engagement," Arlington, VA, 2008. | Credit Suisse Research Institute, "Gender Diversity and Corporate Performance," July 31, 2012. | Forbes, "Patenting the Co-Ed Code," September 13, 2007. | Hewlett, Sylvia Ann, Melinda Marshall and Laura Sherbin with Tara Gonsalves, "Innovation, Diversity & Market Growth," Center for Talent Innovation, 2013. | National Center for Women & Information Technology, "Who Invents It? Women's Participation in Information Technology Patenting," 2012. | Rock, David and Heidi Grant, "Why Diverse Teams are Smarter," Harvard Business Review, November 4, 2016. | Fuhrmans, Vanessa, "Companies With Diverse Executive Teams Posted Bigger Profit Margins, Study Shows," The Wall Street Journal, January 18, 2018.



Courses (Upcoming)

Look out for these future ERG Leadership courses!



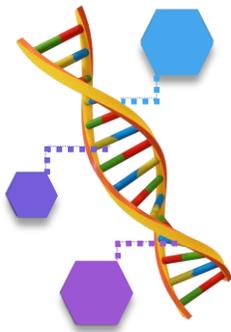
Decision Mastery

Tools for Decision-Making Excellence and Optimization

Coming in 2021

The Decision Mastery course augments your ability to think with a toolbox that synergizes with *The Strategic Lens* course. This course propels those who have taken the other course as it shifts the context and directly emphasizes the tools as the learning centerpiece. By breaking down complex tools into core components, you will see how strategic and systematic approaches can demonstrate rapid results in productivity, strategic clarity and systems-based thinking. Course topics include:

- Tools that harness strategic decision-making, but in focused, simplified and practical ways
- Self-awareness and self-development tools that foster focused results
- Key frameworks that allow you to clear through complex, cluttered contexts and choose clear paths to success
- Models geared toward shifting your worldview, as well as daily projects and tasks



Adaptive Thinking

Mental Flexibility for Rapid Success

Coming in 2022

In today's increasingly complex and fast-paced world, we need to adapt more quickly and flexibly. This adaptive thought process entails agile and smaller changes that eventually culminate in greater shifts. This also encompasses measuring risks and rewards in systematic and thoughtful ways. This course emphasizes practical models and methods that help you adapt to these rapidly changing professional environments. Course topics include:

- How to embrace an adaptive, agile mindset
- Types of Innovative Thinking
- Methods to Discern Risky Scenarios from Smart Risk-Taking
- Adapt in Team Environments to Improve Collaboration