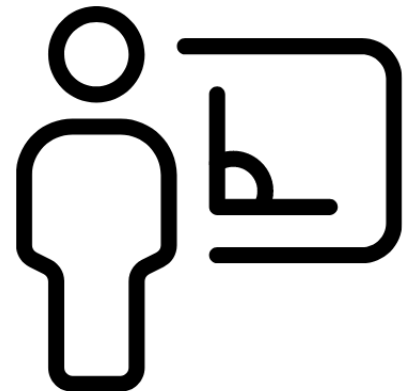


# Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

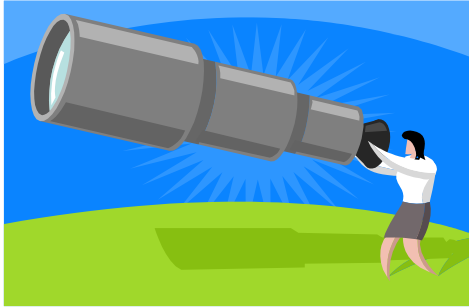
The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*Details create the big picture.*

*Sanford I. Weill*

## Module Two: Seeing the Big Picture



Business acumen requires an understanding of finance, strategy, and decision making. Most managers and employees, however, are responsible for specific areas, and they have little understanding of the impact their decisions have on other areas. When too much focus is placed on one aspect of the business, it is difficult to make decisions for the good of the company. In order to make effective decisions, it is necessary for you to examine the big picture.

### Short- and Long-Term Interactions



When looking at the big picture, it is necessary to consider long term, as well as, short term interactions. Short term interactions are immediate, single exchanges, and they are necessary for the company to survive. Without looking at the big picture, however, short term interactions may hinder long term success. For example, you may damage a business relationship by using aggressive sales techniques, costing you sales in the future.

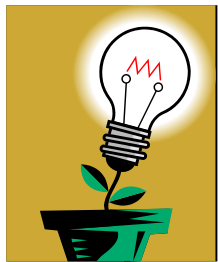
Long term interactions are processes or relationships that are essential to growth. Long term business success requires the long-term interactions. The relationships with customers, vendors, and employees need to be carefully cultivated. Failure to cultivate relationships occurs when there is a lack of communication, or communication is not respectful. Long term relationships help guide the future of the business.

### Improving Long Term Interactions

- **Build relationships:** Relationships must be based on mutual trust, respect, and support.
- **Use feedback:** Request feedback and listen to complaints.
- **Offer value:** Provide value in product, services, and compensation.

<b>Estimated Time</b>	<b>10 minutes</b>
<b>Topic Objective</b>	Understand the difference between long term and short-term interactions.
<b>Topic Summary</b>	<b>Short- and Long-Term Interactions</b> Discuss the connection between long term and short-term interactions.
<b>Materials Required</b>	Flipchart/board, marker
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Ask participants to share examples of ways short term interactions affect long term interactions. These can be personal anecdotes or observations.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What may hinder long term interactions?

## Recognize Growth Opportunities



It is essential for every organization to recognize growth opportunities to ensure long term success. An opportunity is any project or investment that will create growth. Opportunities, however, can be overlooked when we do not pay attention to the big picture. Individuals with business acumen are constantly recognizing opportunities for growth. If recognizing opportunities does not come easily for you, there are steps to take that will ensure that you do not overlook growth opportunities.

- **Identify market trends:** Monitor changes in the market such as technological advancements.
- **Actively research customer needs:** Conduct market research and anticipate customer needs, which you will fulfill.
- **Pay attention to competitors:** Take advantage of a competitor's weakness and learn from their strengths.
- **Monitor demographic changes:** Changes in demographics indicate potential shift in customer base or needs.
- **Consult employees:** Do not overlook employee ideas; encourage brainstorming.
- **Monitor abilities of the workforce:** Pay attention to employee skills. Offer training or hire new employees in response to growth opportunities.

<b>Estimated Time</b>	<b>10 minutes</b>
<b>Topic Objective</b>	Foster the ability to recognize growth opportunities
<b>Topic Summary</b>	<b>Recognize Growth Opportunities</b> Review weaknesses and how to change them.
<b>Materials Required</b>	<a href="#">Worksheet 1-Growth</a>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is an opportunity?

## Mindfulness of Decisions



Decisions need to be made carefully and mindfully. In stressful situations, it is easy to make decisions based on emotions or external pressure. Recognize these events which increase the risk of making a poor decision and can have long term consequences. Mindful decision-making combines reason with intuition to come up with decisions that are based in the present.

### Decision making Steps:

1. **Be in the moment:** Pay attention to how you feel physically and emotionally. This allows you to reach your intuition and understand any feelings of conflict and their source. The source of the conflict may evolve as you become mindful. For example, conflict over the cost of change may shift to conflict that the change goes against company values. Naming the conflict will help you make the decision without fear.
2. **Be Clear:** Investigate for clarity. Begin by investigating your feelings and identifying the type of decision you are making. A neutral decision, for example, should not create a great deal of stress. Once you identify the decision, make sure you have collected the necessary information to make the decision. Additionally, you should consult the people who will be affected by your decision.

3. **Make a choice:** Once you have all the information, listen to your intuition, and write down your decision. Take some time to consider this decision. If you are still comfortable with the decision after a few days, act on it.

<b>Estimated Time</b>	<b>10 minutes</b>
<b>Topic Objective</b>	Understand mindful decision making.
<b>Topic Summary</b>	<b>Mindfulness of Decisions</b> Examine opportunities.
<b>Materials Required</b>	Flipchart/board, marker
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Ask participants to consider decisions they made based on emotions, or times that they ignored their instincts. How could mindful decision making have altered their decisions? List blocks to mindful decision making on the flipchart/board such as emotions, stress, outside pressure, finances.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is mindful decision making?

## Everything is Related



In business, it is necessary for each person to perform specific roles and functions. Every business role is related to each other. For example, poor production and poor customer service will affect sales. Too many sales returns cost the company money, damaging the profits. Each aspect of the business relies on the others. Most people only focus on their specific roles, without considering how they affect the other departments. Looking at the big picture allows you to see how everything is related, and it begins with the leadership. The leadership of the company is responsible for the culture and values. These guide the other aspects of business, which are: operations and marketing, finance and governance, and information and people.

### How to Relate:

- **Be Comprehensive:** Monitor every area of the business to make sure each one is reaching their goals.

- **Be Balanced:** Make sure that each area of the company is sustainable, and make adjustments as necessary.
- **Be Incorporated:** Integrate every aspect of the business with the others. Show employees how they affect each other and the company as a whole.

<b>Estimated Time</b>	<b>10 minutes</b>
<b>Topic Objective</b>	Understand how everything relates to each other.
<b>Topic Summary</b>	<b>Everything is Related</b> Discuss ways to see the big picture and integrate the organization.
<b>Materials Required</b>	<a href="#">Worksheet 2-Related</a>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is related to production?

## Practical Illustration



Angela had to decide which direction to take the company to improve the profit margins over time. She could invest in employee training to improve customer service, or she could cut labor further to save money. Cutting labor would fix the problem immediately, but she was not sure it was the right decision. Every time she thought about cutting labor, she became nauseated. After careful consideration, Angela realized that she felt cutting the labor went against her mission to treat all employees as valued team members.

After gathering data, she learned that sales began to dip when customer service complaints increased. Additionally, there was employee interest in a training program. Her intuition told her that implementing a training program would increase long term profits.

## Module Two: Review Questions

1.) What is a definition of a short-term interaction?

- a) An immediate exchange
- b) Building a relationship
- c) Growth
- d) Interest

Short term interactions are immediate exchanges. They are singular events.

2.) What is essential to growth?

- a) Short term interactions
- b) Events
- c) Long term interactions
- d) Financial interest

Long term interactions are relationships. These are essential to the growth of a company.

3.) What happens when you do not see the big picture?

- a) Opportunities are focused
- b) Opportunities are overlooked
- c) Nothing
- d) Growth is enhanced

Growth requires recognizing opportunities. Not seeing the big picture will result in overlooked opportunities.

4.) What will market research provide?

- a) Investment opportunities
- b) Long term interactions
- c) Short term interactions
- d) Information on customer needs

Recognizing opportunities for growth requires monitoring customer needs. Market research will help provide this information.

- 5.) What do experts in mindful decision making recommend?
- a) Meditation Pay attention to how you feel physically and emotionally
  - b) Exercise Consult the people who will be affected by your decision
  - c) Opportunity Listen to your intuition
  - d) All of the above

Mindful decision making requires connecting with intuition. Experts recommend taking up meditation to improve mindful decision making.

- 6.) Which of the following should not induce stress?
- a) Operational decision
  - b) Neutral decision
  - c) Important decision
  - d) Strategic decision

It is important to identify the types of decisions that you have to make. A neutral decision should not be stressful.

- 7.) What do most people focus their energy on at work?
- a) Big picture
  - b) Interests
  - c) Specific roles
  - d) Company roles

Most people only focus on their specific roles, without considering how they affect the other departments. This can distract from the big picture.

- 8.) What is necessary for being comprehensive?
- a) Make adjustments
  - b) Job descriptions.
  - c) Training programs.
  - d) Monitor every aspect

It is necessary to be comprehensive when examining how the aspects of the business are related. This requires monitoring every aspect of the business.



9.) Business acumen requires an understanding of \_\_\_\_\_.

- a) Finance
- b) Decision making
- c) Strategy
- d) All of the above

Business acumen requires an understanding of finance, strategy, and decision making.

10.) When looking at the big picture, it is necessary to only consider long term goals.

- a) True
- b) False

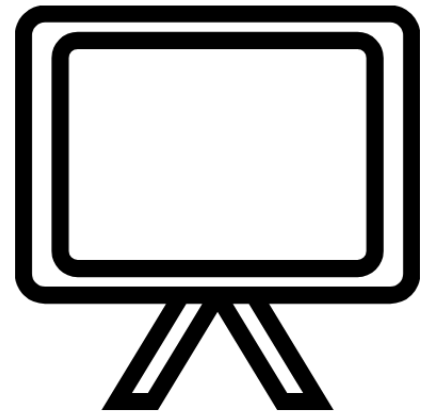
**False:** When looking at the big picture, it is necessary to consider long term, as well as, short term interactions.

# PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





## MODULE TWO

# Seeing the Big Picture

When too much focus is placed on one aspect of the business, it is difficult to make decisions for the good of the company.

In order to make effective decisions, it is necessary for you to examine the big picture.



## Short and Long Term Interactions

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- Build relationships
- Use feedback
- Offer value

## Recognize Growth Opportunities

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It is essential for every organization to recognize growth opportunities to ensure long term success.





## Mindfulness of Decisions

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Decisions need to be made carefully and mindfully. In stressful situations, it is easy to make decisions based on emotions or external pressure.

## Everything is Related

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Looking at the big picture allows you to see how everything is related, and it begins with leadership.



## Practical Illustration



- Short- and Long-Term Interactions
- Recognize Growth Opportunities
- Mindfulness of Decisions
- Everything is Related

## Module Two: Review Questions

1. What is a definition of a short-term interaction?

A. An immediate exchange

B. Building a relationship

C. Growth

D. Interest



# Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



# Business Acumen Quick Reference Sheet



## Decisiveness

Developing Key Performance Indicators requires an understanding of which performances need to be measured and how they should be measured. Creating random metrics will not help gauge the effectiveness of your organization.

### Decisive KPIs

#### Define areas to monitor:

Determine which areas are successful and which ones need improvement.



**Identify criteria:** Brainstorm ideas, and use them to create criteria that need to be monitored. For example, criteria would include customer conversion or units per transaction.



#### Define the measurements:

Create specific SMART goals to monitor. An example would be an average of three units per transaction.



## Develop a Sense of Always Learning

1. **Imitation:** We learn from observing and imitating others, such as instructors or respected mentors.
2. **Reception/Transmission:** Reception is the experience that requires you receive a transmitted message. It may be written or verbal, and it can include values as well as academic understanding.
3. **Exercise:** Actions and practice create learning experiences. These can occur in any action that you practice such as writing, meditation, or computer programs.
4. **Exploration:** Searching for answers or discovering information requires individual initiative. This comes from websites, interviews, books, etc.
5. **Experiment:** Experimenting or assessing the success of a project shows different possible outcomes and influences problem solving.
6. **Creation:** The creative process is also a learning process. These can be individual or group projects. The process ranges from painting to developing a new survey.
7. **Reflection:** Analysis before, during, or after an action is a learning opportunity. This can be done on a personal level or with the help of friends and colleagues.
8. **Debate:** Interactions with others cause us to defend or modify our perspectives. These are potential learning experiences.



## Recognize Your Blind Spots

**Request Feedback:** Ask trusted friends and colleagues for honest assessments.



**Reflect:** Take the time to reflect on your decisions, thought processes, and actions. If you are honest with yourself, you will identify blind spots.



**Study:** Use books, courses, etc. to help you become more in tune with your views and potential blind spots. Figure out what you don't know and strive to learn.



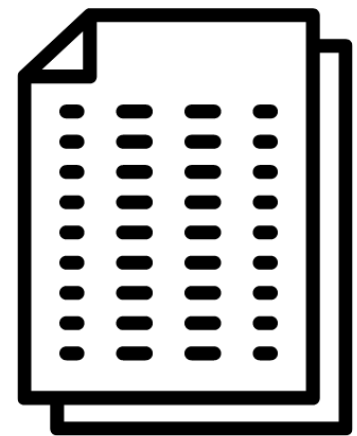
# Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



## Sample Worksheet 1

# *Growth*

Based on the criteria in the module, are there any opportunities you have overlooked? List them below.

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Are there any areas you could better monitor? Outline the necessary changes below.

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Additional Notes:

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## Sample Worksheet 2

# *Related*

List the different components of your business.

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Are there any areas of your company that are not operating as they should? If so, how are they affecting other components?

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What steps can you take to integrate the components of your business?

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## Icebreaker: First Impressions

### PURPOSE

To get participants moving around and introduced to each other.

### MATERIALS REQUIRED

- Name card for each person
- Markers
- Paper and pencils/pens

### PREPARATION

Have participants fill out their name card.

### ACTIVITY

Ask participants to form pairs. Explain that you are going to ask participants to guess their partner's favorite things. As you call out items, participants will write their guesses on paper.

For example, you might say: What would you guess is your partner's favorite

- TV show
- Vacation destination
- Food
- Sport
- Hobby

Give participants a few seconds to write each response. When you have gone through your list, ask participants to share their guesses with their partners.

After participants have had a couple of minutes to share their guesses, you might ask:

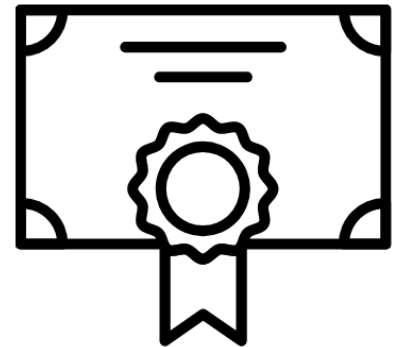
- What did you base your guesses on?
- Did anyone guess everything wrong? Did anyone guess everything right?

Wrap up by making the point that in any personal interaction first impressions are often misleading. When we start a negotiation, the guesses we make about another person can lead to false assumptions about what the person wants.

# Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*  
*Business Acumen*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_