KAI INSTITUTE
PROGRESS THROUGH LEARNING

2022

COURSE CATALOG

KAI Institute
1 Bayswater Court
Gaithersburg, MD 20878
POC: Bel Leong-Hong, President
bel@kaiglobal.com
(301) 948-1682

ABOUT US

The KAI Institute, a business unit under Knowledge Advantage, Inc. (KAI), a Woman-Owned Small Business (WOSB), specializes in delivering cutting-edge, experiential leadership development and Diversity and Inclusion workshops to federal, state, and local government agencies and Fortune 500 companies.

OUR TEAM

Our training programs are led by experienced master facilitators and executive coaches, each of whom has more than 20 years of experience training, mentoring, coaching, and advising government employees at all levels. Each program is tailored to result in greater productivity, improved efficiency, more cohesive teams, and increased capacity to innovate and adapt to change.

BEL LEONG-HONG, PRESIDENT & CEO

President and CEO of KAI, Bel Leong-Hong, was on the National Defense University's Board of Visitors for the last eight years, where she successfully advocated the inclusion of cybersecurity into the Joint Professional Military Education curriculum. During her tenure at the Department of Defense (DoD), Ms. Leong-Hong developed and implemented a pilot ECQ-based leadership program for emerging civilian DoD leaders, which she subsequently adapted in 2000 into Army Knowledge Leaders, an elite leadership-centric and cohort-based model IT leadership interns-leaders program for Army civilians that adopted many cutting edge leadership development principles using the SES ECQ's as its foundation.

DANNY ARANZA, PROJECT MANAGER

Mr. Aranza brings over 30 years of legal, policy, program, financial, and consulting expertise in his role as Vice President of Business Development for Knowledge Advantage Inc. Mr. Aranza was a senior executive during the Clinton Administration at the Department of the Interior where he managed an office that dispersed $300 million annually in financial, technical and development assistance programs for American Samoa, Guam, the Commonwealth of the Northern Mariana Islands, the Federated States of Micronesia, the Republic of the Marshall Islands and the Republic of Palau.

CARSON EOYANG, SENIOR FACILITATOR AND CURRICULUM ADVISER

Dr. Carson Eoyang has over 34 years of experience in government experience training and education. His teaching and research focuses on executive learning and executive leadership. Before retiring in 2007, he served as Chancellor of the National Intelligence University and Assistant Deputy Director of National Intelligence for Education in the Office of the Director of National Intelligence, where he introduced innovative learning techniques and expanding collaborative learning opportunities to support the National Intelligence Strategy. Dr. Eoyang was the Federal Aviation Administration (FAA) Program Director for Training, and also served as Chair of the FAA's Subcommittee on Educational Technology and NASA Director of Training & Education.

KAIINSTITUTE
PROGRESS THROUGH LEARNING

TONY TAGUBA, SENIOR FACILITATOR

General Taguba has over 40 years of senior executive and military leadership experience in public service, private sector, non- profit, and community organizations. General Taguba has a proven record of achieving the highest levels of effectiveness and innovation in a unique career spanning U.S. Army, defense industry, and nonprofit sectors. He is Chairman and a founding member of Pan-Pacific American Leaders and Mentors (PPALM), whose mission is to create a professional network of Asian Americans and Pacific Islanders, military and civilian, committed to serving the nation by providing leadership, education, mentoring and fellowship opportunities.

SONIA ARANZA, SENIOR FACILITATOR AND DIVERSITY SPECIALIST

Ms. Aranza is an Executive Fellow with KAI and an award-winning executive coach, keynote speaker,corporate consultant, master facilitator, and organizational strategist specializing in Cross-Cultural Communications, Diversity Competitive Advantage and Effective Leadership. . She has 20years of experience in the design and implementation of organizational development and executive leadership programs across the Federal government and the private sector.Her clients include Top Fortune 500 companies such as Coca Cola, IBM, McDonald's, Walmart, Sodexo, State Farm Insurance, Texaco, Toyota and Verizon. Her government clients include Department of Labor, Social Security Administration, U.S. Army, U.S. Postal Service, National Labor Relations Board, EPA and NASA.

JOHN FRASER, SENIOR FACILITATOR

Mr. Fraser is currently an active member of the National Defense University Board of Visitors. He is an experienced management consultant with extensive leadership training, strategic planning, organization development, change management, and executive coaching background. He possesses significant experience in higher education which includes program management, strategic planning, curriculum development and teaching. After retiring from the Navy at the rank of 0-6 (Navy Captain), Mr. Fraser has led and directed the prestigious executive education and leadership programs at the University of Iowa Executive MBA Program earning him widespread recognition including the Bud Fackler Service Award from the Executive MBA Council.

DR. MARTINA CARROL-GARRISON, SENIOR FACILITATOR & EXECUTIVE COACH

Dr. Carroll-Garrison is a Strategic and Outcome-Focused Engineer Executive and Leadership Coach with 15years of C-level global training experience within Defense and Intelligence Community. Dr. Carroll- Garrison possesses a distinguished record of providing international leadership, mentoring, and coaching of strategic endeavors; including managing risk and financial compliance, while achieving measurable results for complex organizations facing global challenge. Dr. Carroll-Garrison is highly skilled in building leadership capacity, executive presence, corporate reputation alignment, problem solving, organizational consolidation / optimization, intercultural management, and stakeholder expectation management within federal space and private industry. She is an executive Coach accredited through the Georgetown University Accreditation Training Program.
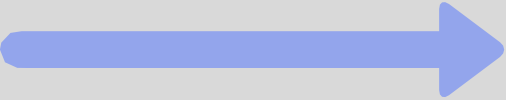
MARGARET C. FISCHER, SENIOR FACILITATOR & EXECUTIVE COACH

Ms. Fischer has over 20 years of experience in organizational development, organization effectiveness and group process facilitation for a variety of federal, non-profit, and commercial sector customers. Her innovative, decisive, and solutions-oriented leadership helped provide process improvement consultation to the entire spectrum of Executive Lifecycle Management Process that serves the senior executives of the Department of Defense. Her clients span across private and public service sectors to include the Office of the Secretary of Defense, United Nations, AARP, Office of Personnel Management and the Nuclear Energy Institute. Ms. Fischer holds a certificate in Organizational Development from Georgetown University and is a certified coach through the International Coaching Federation.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

KAI INSTITUTE'S SIX PILLARS OF LEADERSHIP DEVELOPMENT

LEADING CHANGE

CORE COMPETENCIES →	CREATIVITY AND INNOVATION	STRATEGIC THINKING	FLEXIBILITY
	EXTERNAL AWARENESS	VISION	RESILIENCE

This core pillar involves the ability to bring about strategic change, both within and outside the organization to meet organizational goals. Inherent to this competency is the ability to establish an organizational vision and to implement it in a continuously changing and highly ambiguous environment. Balances change with continuity and address resistance.

LEADING PEOPLE

CORE COMPETENCIES →	CONFLICT MANAGEMENT	DEVELOPING OTHERS
	LEVERAGING DIVERSITY	TEAM BUILDING

This core pillar involves the ability to lead and inspire a multi-sector group of not only employees (civilian and military), but also other government agency personnel at the federal, state, and local levels, as well as contractors and grantees toward meeting the organization's vision, mission, and goals. Inherent to this competency is the ability to provide an inclusive workplace that fosters the motivation and development of others, facilitates effective delegation, empowerment, personal sacrifice, and risk for the good of the mission, as well as trust, confidence, cooperation and teamwork, and supports constructive resolution of conflicts

RESULTS DRIVEN

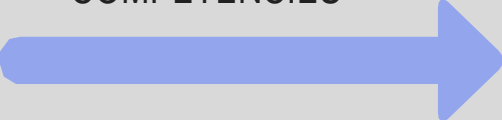| CORE COMPETENCIES →	CREATIVITY AND INNOVATION	STRATEGIC THINKING	FLEXIBILITY
	EXTERNAL AWARENESS	VISION	RESILIENCE

This core competency involves the ability to meet organizational goals and customer expectations. Inherent to this competency is stewardship of resources, the ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems, and calculating risks.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

BUSINESS ACUMEN

CORE COMPETENCIES →	MANAGEMENT	MANAGEMENT
	HUMAN CAPITAL MANAGEMENT	TECHNOLOGY MANAGEMENT

This core pillar involves the ability to manage human, financial, and information resources strategically. Inherent to this competency is the ability to devise solutions with an understanding of how to impact business results by making connections between actions and/or performance and organization goals and results, as well as external pressure points.

BUILDING COALITIONS

CORE COMPETENCIES →	PARTNERING	INFLUENCING
	POLITICAL SAVVY	NEGOTIATING

This core pillar involves the ability to build coalitions internally and with other federal agencies, state and local governments, non-profit and private sector organizations, foreign governments, or international organizations to achieve common goals.

ENTERPRISE- WIDE PERSPECTIVE

CORE COMPETENCIES →	MISSION ORIENTATION	CORPORATE PERSPECTIVE	GLOBAL PERSPECTIVE
	MISSION AND CULTURE	NATIONAL DEFENSE INTEGRATION	NATIONAL SECURITY FOUNDATION
	NATIONAL SECURITY ENVIRONMENT	NATIONAL SECURITY STRATEGY	

This core pillar involves a broad point of view of the DoD mission and an understanding of individual or organizational responsibilities in the relation to the larger DoD strategic priorities. The perspective is shaped by experience and education and characterized by strategic, top level focus on broad requirements, joint experiences, fusion of information, collaboration, and vertical and horizontal integration of information.

KAIINSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings - Leading Change

Leadership Vision Statement

Participants go through a self-reflected, guided exercise that is expertly facilitated based on your own experience, knowledge, and goals to prepare a personalized leadership vision statement to guide your organization and your career.

Megatrends

Participants are guided through a historical overview of megatrends that revolutionized economies and societies: Agricultural Revolution, Industrial Revolution, Technology Revolution, and the Cyber Kinetic Revolution. Each megatrend demonstrates how critical it is for the leader to be aware not just of the narrow scope of their own organization and industry, but also broader external forces that can radically transform ways of thinking and doing business.

Strategic Leader Competencies

This workshop begins by exploring the environments that today's strategic leaders commonly face: national security geopolitical, technology, and leadership and management. Learn the skills and competencies that strategic leaders must have to successfully navigate each of these environments.

Organizational and Management Theory

Participants learn about the evolution of organizational and management theory from the industrial revolution to today. Different theories are covered including those that emphasize scientific management, organizational structure, human relations, operations research and systems management, economic decision-making, behavioral science, organizational culture, corporate strategy, total quality management and business process re-engineering, enterprise resource planning, knowledge management, and integrated supply chain management.

Organizations as Systems

Participants learn how the success or failure of organizations depends upon the interaction among 7 elements comprising the organizational ecosystem: Strategy, Structure, Systems, Shared Values, Skills, Staff, and Style.

Defense Executive Education

Participants learn the roles and responsibilities of executives in the Department of Defense and military services: Operational Commanders, Organization Administrators, and Enterprise Executives. Learn the organizational structure, influence models, management focus, time horizon, measures of effectiveness, leadership framework, communication channels, and planning, decision-making, crisis management processes used by each.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings - Leading Change

Adaptive Leadership and Management

Today's organizations are increasingly staffed by knowledge workers, who have an increasingly specialized knowledge that their managers and leaders do not have. To be effective in today's workplace, modern leaders must move away from traditional ideas of managing an organization toward adaptive and flexible ways of leading.

Executive Learning

Participants learn whether it is more important to be a generalist or a super specialist when moving up the leadership ranks. They also discover the most critical ability to possess as an executive and what executives should pay the most attention to when leading their organizations.

Change: Adapt, Manage, Lead

Participants learn to understand the various reactions to change; the change process; and practical strategies and tools to help adjust and benefit from change. The course also focuses on the differences between adapting, managing and leading/initiating change. Participants learn to manage their own and others' reactions to change as well as influence skills to initiate positive change. An influence strategies self-assessment may be included as part of the half-day session.

Innovation and Technology

Participants learn how a group of hackers, geniuses, and geeks created the Digital Revolution. Learn the seven fundamental lessons from the great innovators of the technology revolution.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings- Leading People

Building High Performance Teams

This course provides participants with practical techniques on how to develop high performing teams by avoiding certain interpersonal behaviors and employing effective leadership techniques that significantly enhance employee morale and workplace productivity.

Mentoring v. Coaching

Participants learn the difference between mentoring and coaching. Within an organization, senior leaders can play an important role in succession planning by mentoring high potential employees. Class participants will be able to learn and understand mentor and mentee role and responsibilities, and dynamics of a successful mentor-mentee relationship.

How to Cultivate Engaged Employees

Participants learn six lessons that successful business leaders have used to cultivate engaged employees and a more productive work place. These include: being modest; listening seriously and showing it; inviting disagreement; focusing on the agenda; admitting to not having all of the answers; and not insisting that a decision be made before it is ready to be made.

How to Lead a Diverse Workforce

Participants learn to heighten their self-awareness, including the many dimensions of one's own diversity. They also heighten the awareness of others and the many lenses through which people see the world around them. Students learn to understand the impact of diversity on their own personal interactions with others and on broader organizational dynamics in the workplace. Finally, they also acquire specific management skills to effectively engage and lead a diverse workforce.

How to Lead a Multigenerational Workforce

Workshop participants enhance their knowledge regarding differences among generations in the workforce – e.g. Baby Boomers, Gen X, Gen Y, and the Millennial Generation. They learn the different work philosophies that each generation brings to the work place and the impact of these differences on office interactions. The students acquire practical tools and techniques to leverage multigenerational differences in order to maximize organizational effectiveness and achieve mission goals and objectives.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings- Leading People

Conflict Management

Participants heighten their own personal awareness and one's origins of understanding of "conflict." They heighten awareness of others and the impact of "perspective" on conflict resolution. They explore ways to manage conflict and produce better outcomes. They understand the business case for conflict resolution and its impact on organizational excellence.

Five Steps to Negotiating Conflict

Participants learn the five basic steps to negotiating conflict: improve your understanding of the situation, be an active listener, set a constructive tone and de-escalate tension, know your alternatives, bring in a professional negotiator when appropriate.

Implicit Bias

Participants learn how our biases operate unconsciously or implicitly on our decisions and behaviors to include or exclude others., establish bias as a natural and universal function of the human brain and practice strategies and action steps to recognize and mitigate implicit bias in organizational collaboration and decision-making.

Five Dysfunctions of a Team

Participants learn the five key dysfunctions of a team and whether any apply to the teams to which you belong: absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and inattention to details.

Workplace Civility

Participants learn about the rise of deviant workplace behaviors as a result of four shifts in our contemporary world. Participants are presented with the the antithesis of workplace incivility, which includes the parameters of workplace civility, as a preferred organizational behavior, and we then explore forty strategies that each employee can execute themselves towards creating a more civil workplace

KAI INSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings- Results Driven

Problem-Solving

Participants learn the distinction between problems to solve and polarities to hold. Recognize how personal comfort, history and feelings influence our decisions. Use traditional problem-solving models to employ "either/or" actions. Learn how polarity mapping employs "both/and" actions. Enhance team involvement in effective decision-making processes

Managing Stupidity

Participants learn about human stupidity and how it can be avoided by following a structured decision-making process that takes into account four elements: information, mind-set, circumstances, and outcomes. When stupid mistakes nevertheless occur, learn ways to mitigate adverse consequences and achieve positive outcomes.

Customer Service

What is customer service? How is it demonstrated by the four "P's" - Promptness, Politeness, Professionalism, and Personalization? How is customer service related to the mission of your organization? What is the unique value proposition and how does it contribute to customer service?

Accountability

Learn the distinction between Accountability and Responsibility. What is your leadership philosophy and why is it important to Accountability? Learn the three levels of Accountability: Personal, Cultural, and Hiearchal. Case studies of Accountability.

Decision-Making

What is decision-making? Learn the 7 key steps to effective decision-making: Identify the decision; gather information; identify alternatives; weigh the evidence; choose among alternatives; take action; and review your decision

Course Offerings- Building Coalitions

Building Coalitions & Collaboration

Participants learn the distinction between formal coalitions and informal collaboration. Learn the pros and cons of informal collaboration across business units and agency lines. Learn the key roles that a leader and a facilitator have in ensuring a successful collaborative process.

Organizational Culture

Participants learn that organizational culture addresses who we are, what we stand for, what we are about, where we are going, how we act, and how we use power. Learn the ways organizational culture is manifested through buildings and architecture, logos and advertising, uniforms and workplace dress, company or agency mottos, etc. Understanding your unique organizational culture is critical to navigating it successfully.

Organizational and Professional Networking

Participants learn the importance of organizational and professional networking. Learn effective networking techniques. Develop your own "Elevator Speech" for quick introductions that lead to new professional relationships. Become aware of non-verbal communication. Learn other communication channels to build and maintain networks.

Six Bases of Social Power

Participants learn the six bases of social power, which are also at play within an organization: formal authority, recognition and reward, coercion and penalty, expertise, charisma and reputation, access to information, and to decision-makers and other key networks.

Organizational Politics and Conflict Management

Participants learn that organizational politics involve multi-dimensional interactions among personal differences, parochial interests, partisan issues, and paramount values. In order to manage disagreements that inevitably arises from the confluence of these interactions, leaders must be skilled in managing conflict.

Types of Negotiations

Participants learn the distinction between position-based negotiations and interest-based negotiations. The mind-set and processes are different for each type of negotiation. Learn which type to use for different situations.

KAIINSTITUTE
PROGRESS THROUGH LEARNING

Project Management

Participants learn the fundamentals of project management, from initial project planning to project close out. Gain an understanding of the basic steps of project management: initiating the work, identifying the work, estimating the work, scheduling the work, creating a budget, completing the plan, implementing the plan, conducting periodic management reviews; and closing the project.

Process Improvement

What is Six Sigma and how is it different, but related to the concept of Lean? Learn the basics of these fundamental process improvement concepts and become familiar with the basic terminology: Value, Value Stream, Flow, Pull, Seeking Perfection, Waste - Muda, Mura, Muri, New Types of Waste, Complexity, the DMAIC method

KAI INSTITUTE
PROGRESS THROUGH LEARNING

Course Offerings- Enterprise Wide Perspective

Enterprise Wide Perspective

Participants gain an understanding of the broad perspective of the enterprise—in the context of National Security strategy, the Enterprise perspective begins with the National Security strategy, the national strategic values, interests, tracing it to the DOD level, down to the Service level, to the Command level, and all the way down to the organizational level – develop an understanding of why this is important, and how to trace the national strategy down to the organizational strategy.

Fundamental Competencies

Self-Awareness

Before we can lead others, we must first be able to lead ourselves. Self-awareness of our personal strengths, weaknesses, blind spots, personality preferences, leadership values, communication traits, and conflict styles are important ingredients in how effective we are as leaders. KAI administers a number of proven diagnostic tools and assessment instruments including those described below and summarized on the following page.

Emotional Intelligence

Understand how Emotional Intelligence/Emotional Quotient is an fundamental leadership quality in the workplace. Recognize why EI/EQ directly impact organizational efficiency and leadership effectiveness. Learn the characteristics of high EI/EQ and low EI/EQ and steps to improve.

MBTI

The Myers-Briggs Type Inventory is one of the world's most administered individual assessments. Take the on-line MBTI assessment, and be learn where you fall in the four personality dimensions: Interoversion-Extraversion, Intuition-Sensiing, Thinking-Feeling, and Judging-Perceiving.

Effective Communications

This module focuses on communication skills and employing better communication in the workplace. Understand the basics of communication. Identify how authentic dialogue can built trust. Influence up and across all levels. Learn how to have conversations with difficult people.

Giving and Receiving Feedback

Giving and receiving feedback is a critical competency for leaders. Learn the Dos and Don'ts of giving feedback in the workplace. Get tips on providing critical feedback. Learn positive feedback techniques.

Confident Oral Presentations

Giving briefings, speeches, and other oral presentations can be terrifying for many people, especially in front of larger and or more senior audiences. This course provides tips, techniques, and plenty of practice for making confident and effective oral presentations.

Writing Your ECQs

The Executive Core Qualifications are leadership skills and competencies required to become a member of the Senior Executive Service. This class provides effective guidance based on demonstrated success in how to write clear, concise, and persuasive ECQs.

KAIINSTITUTE
PROGRESS THROUGH LEARNING

Fundamental Competencies

Productivity, Priority and Time Management

Participants learn strategies and tools to build or enhance their productivity without sacrificing the quality of their work or their workday satisfaction. This course links productivity to the focus on priorities and self-management along with creative time management and effective communication. Topics include productivity tips from the fields of science, health and wellness to manage competing priorities, stress and workload.

Managing the Transition into Management and Leadership

Participants learn the mindset shifts, strategies and tools necessary to move from being an individual contributor and subject matter expert to an effective manager and leader. This course leverages participants' current strengths and identifies additional skills for the new role. Participants will discuss typical transition challenges, along with solutions to address these challenges through communication, collaboration and partnering for performance. Self-assessment tools such as DISC may be used if session length permits.

Motivation

This course provides the opportunity for individuals, teams and leaders to explore various intrinsic motivation factors, current research and the motivation process. Participants learn to apply this knowledge to their own work challenges and engagement. Participants move from self-awareness to understanding that the motivators and drivers of team members are diverse and impact collaboration, effective coaching and conflict management. Practical tools and exercises allow participants to practice building a motivational culture for themselves and their teams.

Delegation

Participants learn the benefits and challenges of effective delegation, along with a process and the skills necessary to become a successful delegator. This course helps participants to identify their own delegation beliefs, skills, and opportunities and a chance to practice thoughtful delegation. Course discussion also links successful delegation with time management, motivation and developing others.

DIAGNOSTIC TOOLS AND ASSESSMENT INSTRUMENTS USED BY KAI	
TOOL/INSTRUMENT	**KEY FEATURES**
Emotional Quotient Inventory (EQ-I 2.0®)	Assessment measures 15 EQ competencies that differentiate outstanding from average performers in five domains: Self-Perception, Self-Expression, Interpersonal, Decision-Making, and Stress Management
Gallup StrengthFinders® Assessment	This assessment identifies up to 34 individual talents or strengths that are encompassed in one of four leadership domains: Strategic Thinking, Executing, Influencing, and Building Relationships.
FIRO-B® Assessment	Fundamental Interpersonal Relations Orientation identifies how much interpersonal interaction an individual desires in leadership activities by measuring three areas of need: inclusion, control, and affection.
Intentional Leadership®- 12 Lenses	Identifies 12 Lenses of Leadership to focusing strengths and managing weaknesses based on MBTI personality types and Emotional Quotient
Leadership Diamond® Simulation	360° Assessment distinguishes four interdependent leadership imperatives, or "orientations": Ethics, Vision, Courage and Reality. The relationship among the four orientations determines the shape and size of your Leadership Diamond®.
Leadership Circle Profile®	The only 360° assessment that measures the two primary leadership domains – Creative Competencies and Reactive Tendencies – and integrates this information so that key opportunities for leadership development immediately rise to the surface.
Leadership Practices Inventory®	360° Assessment identifies and measures individual profiles in five practices of exemplary leadership: Model the Way, Inspire a Shared Vision, Challenge the Process, Enable Others To Act, Encourage the Heart.
Myers Briggs Type Indicator®	Determines personality and workstyle preferences for working in teams (Extrovert v. Introvert), data collection (Sensing v. Intuitive), decision-making (Thinking v. Feeling), and finalizing outcomes (Judging v. Perceiving)
Polarity Mapping®	Participants learn to map two opposing interdependent value (leadership strengths) pairs, depicting both upside and downside potential results and discover how to leverage these "polarities" to optimize the upside potential of both poles.
SOLVE® Communication Model	Nine step process to improve communication across differences and resolve conflict by shifting emotional-cognitive situations for positive outcomes
Thomas-Kilmann Conflict Mode®	Conflicts style inventory developed to measure an individual's response to conflict situations including: Competing, Avoiding, Collaborating, Accomodating, and Compromising

KAI Assessments In Action

Organizational Assessements: Culture Session

The KAI Institute, in partnership with Veritas Culture, offers Culture Sessions -- a powerful organizational assessment and transformation approach to help an organization's workforce understand and lead changes to achieve greater efficiency and effectiveness. This unique approach focuses on root issues and root solutions, takes into consideration the internal and external organizational culture; and utilizes trainers who are certified in class facilitation, coaching, and emotional intelligence.

360° Assessment: The Leadership Challenge

The Leadership Challenge is a suite of books, training products and assessments based on the industry standard book written by James Kouzes and Barry Z. Posner. This 2-day workshop provides an on-line 360° Leadership Practice Inventory®, which measures the extent to which an individual exhibits the five leadership practices: (1) Model the Way; (2) Inspire a Shared Vision; (3) Challenge the Process; (4) Enable Others to Act; and (5) Encourage the Heart. A two-day Leadership Challenge Workshop® provides an in-depth explanation and exploration of these leadership practices, using individual assessment results as the springboard to greater self-awareness and leadership growth.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

VIRTUAL COURSE OFFERINGS

1. Fundamental Skills for Teleworkers

1.1.   Telework and Telecommuting (Carroll-Garrison)

Working in a home office requires a unique set of skills. Teleworkers or virtual employees have additional challenges created by not being in a centralized office. Communication issues alone make it a challenging job and recognizing these challenges will help your participants become great teleworker. Participants will establish the additional skills needed to be successful in their work from home environment.

Workshop Objectives:
- *Know the skills required for working outside the office*
- *Learn keys to proper self-management*
- *Learn ways to manage time efficiently*
- *Know different methods of organization and planning*
- *Identify various forms of communication and their proper use*
- *Address and resolve challenges that teleworkers can face*

1.2.   Time Management in A Virtual Environment (Carroll-Garrison)

Those able to successfully implement time management strategies are able to control their workload rather than spend each day in a frenzy of activity reacting to crisis after crisis - stress declines and personal productivity soars! These highly effective individuals are able to focus on the tasks with the greatest impact to them and their organization. Participants will explore personal motivation, delegation skills, organization tools, and crisis management.

Learning Objectives:
- *Plan and prioritize each day's activities in a more efficient, productive manner*
- *Overcome procrastination quickly and easily*
- *Handle crises effectively and quickly*
- *Organize your workspace and workflow to make better use of time*

KAIINSTITUTE
PROGRESS THROUGH LEARNING

- *Delegate more efficiently*
- *Use rituals to make your life run smoother*
- *Plan meetings more appropriately and effectively*

1.3. Telephone Etiquette (Carroll-Garrison)

The meaning of Telephone Etiquette can sometimes be difficult to describe. It can be a unique attribute or characteristic that facilitates great communication, inside and outside the office. It can be the special way that you show confidence in any challenging situation. These and other events can become more easily managed with this great workshop. Participants will begin to see how important it is to develop better telephone communication skills. By improving how they communicate on the telephone and basic communication skills, participants will improve on almost every aspect of their career.
Learning Objectives:
- *Recognize the different aspects of telephone language*
- *Properly handle inbound/outbound calls*
- *Know how to handle angry or rude callers*
- *Learn to receive and send phone messages*
- *Know different methods of employee training*

1.4. Strategies and Tools for The Virtual Workplace (Camuto)

This virtual course brings practical strategies and tools to individuals and teams who face unique challenges working in a virtual environment. The complete course (4 hours) may be offered in 1, 2 or 4- hour virtual segments. The course is interactive and includes practice exercises along with optional self-assessment tools. The course contains productivity tips from the fields of science, health and wellness to manage competing priorities, stress and workload.
Leaning Objectives:
- *Identify and prioritize challenges and opportunities in the virtual work environment*

- *Assess strengths/skills and improvement areas needed to adapt to a virtual work environment*

- *Practice ways to develop inclusion, camaraderie and collaboration among your colleagues and team in effective virtual meetings*

- *Discuss ways to use challenges and a chaotic work environment to innovate and influence positive change*

- *Focus on priorities and self-management along with creative time management and effective communication*

1.5. Effective Communication in the Virtual Workplace (Camuto)

This virtual course includes the skills and self-awareness needed for effective virtual communication. The complete course (4 hours) may be offered in 1, 2, or 4-hour virtual segments. The course is interactive and includes practice exercises along with optional self-assessment tools.
Learning Objectives:
- *Identify visual, vocal and visual communication components*

- *Discuss passive, aggressive and assertive communication styles*

- *Learn the importance of not making assumptions or drawing conclusions before understanding intentions and styles*

- *Practice active listening skills in a virtual environment*

- *Use a self-assessment tool to identify communication strengths and areas to improve*

- *Review techniques to both manage and participate in effective virtual meetings*

KAI INSTITUTE
PROGRESS THROUGH LEARNING

2. Skills for Leading Virtual Teams

2.1. Your Transition to Virtual Facilitation (Camuto)

This virtual course provides effective strategies and tools for facilitators who now work in virtual environments. The complete course (3 hours)may be offered in 1, 2 or 3-hour virtual segments. There is great value for participants, facilitators and organizations in this unique training environment.
Learning Objectives:

- *Identify challenges and opportunities in the online training and working environment*

- *Learn how to engage participants and to create interactive and reflective training experiences*

- *Discuss ways to create camaraderie and collaboration among participants and team members*

- *Review tips and options for gaining comfort with live on-line training and facilitation*

2.2. Virtual Team Building and Management (Carroll-Garrison)

Virtual teams continue to grow and expand in different areas. But sometimes learning to manage a team that we can't physically see every day can be difficult. When we learn how to manage our virtual teams as effectively as our local teams, we can sustain and increase productivity with a new perspective on our role as leader, manager and influencer.
Learning Objectives:

- *Know the keys to establishing a virtual team*
- *Learn how to hold effective meetings and group sessions*
- *Learn effective ways to communicate with team members*
- *Use tools to build trust and confidence among employees*
- *Know how to handle poor performing employees*
- *Know how to manage a virtual team during any project*

2.3. High Performance Teams in a Remote Workplace (Carroll-Garrison)

Remote Workforce are organizations, teams or groups working in a virtual environment that are focused on achieving the same goals as your local team. Bringing team members together through a virtual environment can be a challenge task. This workshop identifies these challenges and helps your participants push through to achieving high performance. By knowing and managing the way people interact in a remote environment, you will be setting up your high-performance teams to accomplish any task.
Learning Objectives:

- *Understand the characteristics of a high-performance team.*
- *Understand how to create teamwork.*
- *Understand the importance of communication.*
- *Understand how to train high-performance remote teams.*
- *Learn how to manage a high-performance team.*
- *Learn the techniques of an effective team meeting*

2.4. Tools You Need to Manage Remote Workers (Carroll-Garrison)

By simply focusing on three critical areas of importance to the effective management of remote workers, namely communication, community, and career development. As with any new practice, such as managing a newly formed virtual team, newer challenges arise. For managers who have to work with remote employees, it is important for them to keep their schedules, goals and daily day to day work responsibilities in sync. There's no reason why aspects like working culture, distances, language barrier and more should serve as a hindrance in connecting with remote workers. With the right tech tools and know-how at your disposal, these issues become irrelevant, and today we will help you discover how you can take advantage of them.
Learning Objectives:

KAI INSTITUTE
PROGRESS THROUGH LEARNING

- *Understand the importance of communication*
- *Identify various forms of communication and their proper use*
- *Understand the importance of community*
- *Identify various forms of community and its importance in a remote work environment.*
- *Explore tools towards building and sustaining community*
- *Understand the importance of career development to remote workers*
- *Explore how to maintain career development opportunities for a virtual workforce*

2.5. Success in Leading Virtual Teams (Carroll-Garrison)

For some organizations virtual teamwork was a seismic event. Although virtual teaming affords a number of benefits it can also be plagued by a number of logistical, technical and socio-emotional challenges including scheduling, differing cultural norms, expectations, and communication styles. The rules that apply to face-to-face teams do not necessarily apply to virtual teams and managers must be more disciplined in their approach to managing virtual teams.

Learning Objectives:
- *Explore how team set up appropriate team norms*
- *Identify and clarify roles*
- *Reestablish expectations towards individual accountability*
- *Explore how to regulate team communication and engagement*

3. Dealing with Crisis and Anxiety

3.1. Leading in Time of Crisis (Armstrong)

This virtual course explores the essential aspects of trust, fear, threat, and rewards that influence how humans see and respond to crisis--and how to proactively manage them. The complete course (4 hours) may be offered in 2, 3, or 4-hour virtual segments. The course is interactive and includes practice exercises.

Learning Objectives:
- *Identify the dimensions of trust*
- *Identify the (4) fear factors and the 5 areas the brain cares about*
- *Learn how trust, fear, threats and awards impact how humans respond in time of crisis*
- *Understand the fallacies of introducing best laid plans without balancing the human side*
- *Discuss proactive and reactive techniques leaders can use to minimize these impacts*

3.2. Crisis Management (Carroll-Garrison)

Crisis management is as important as finance management, personnel management, etc. Having a clear and effective program and plan for an event is critical not only to your survival, but critical to the profitability and possibly the survival of the organization. Being able to identify risk, assess the situation and respond appropriately is important, and requires not only training, but practice.

Learning Objectives:
- *Identify potential risks*
- *Learn concerning behaviors*
- *Know what a trigger is and how that can escalate*
- *Understand the proper response to an event*

KAI INSTITUTE
PROGRESS THROUGH LEARNING

3.3. Increasing Your Happiness (Carroll-Garrison)

Increasing one's happiness can be done through the power of positive thinking. That is one skill that this workshop will touch on to teach your participants how to be happier. Happiness will spread throughout your organization and have a positive effect on everyone. Your participants will engage in unique and helpful ways to increase their happiness. This will have a robust effect on their professional and personal lives. It will improve their communication skills, increase productivity, and lesson absenteeism.

Learning Objectives:
- *Discuss how planning ahead cultivates workplace happiness*
- *Create a nightly routine and daily plan*
- *Relate more effectively to others in the workplace*
- *Understand how the workspace environment impacts happiness*
- *Think more positively*
- *Take actions that will create greater workplace happiness*

3.4. Managing Workplace/Workforce Anxiety (Carroll-Garrison)

The contemporary workplace/work life is one of the leading locations/experiences where people endure stress and anxiety. Every employee will encounter it sometime during their career. Everyone should be aware of the signs of anxiety and the tools needed to cope and deal with it. This workshop explores the important skills and resources to necessary to recognize and manage workplace anxiety. By identifying these symptoms and coping skills employees and managers will be better suited in dealing with these common situations. Through this workshop your leaders, managers and influencers will explore the challenges that the workplace and work life can bring.

Learning Objectives:
- *Explore different types of workplace/work life anxieties*
- *Learn to recognize symptoms and warning signs*
- *Determine ways of coping and managing problems*
- *Recognize common trigger and accelerants*
- *Learn the difference between anxiety and common nervousness*

3.5. Live Your Best Life During A Period of Mandatory Telework (Carroll-Garrison)

The introduction of successful remote working at an organization under normal circumstances takes time, structures, policies and a considered approach. Many organizations and individuals are being forced to introduce social distancing to contain the spread of the coronavirus – and suddenly find themselves working from home for the first time. Teleworkers already working from home and those who advocate for remote working will caution that a hastily planned remote work culture can result in a bad first experience for many.

Learning Objectives:
- *Explore the importance of a fixed schedule*
- *Establish a "start-work" and "end-work" routine*
- *Time Management for the remote worker*
- *Create distance between their home office their home!*
- *Understand their biorhythms.*
- *Understand the power of networking.*
- *Need structure AND flexibility.*
- *Know when to take a break*

KAI INSTITUTE
PROGRESS THROUGH LEARNING

4. Self-Awareness and Leadership

4.1. Implicit Bias and The Power of Inclusion© (Aranza)

This popular, highly interactive workshop on Implicit Bias supports the business case for incorporating Diversity & Inclusion in the workplace. It establishes bias as a natural and universal function of the human brain, rather than as a negative personality characteristic. The class analyzes how participants' backgrounds create a subjective lens through which they experience the world and interact with others. Students will learn to identify the impact of implicit bias on workplace culture, workforce development, and mission accomplishment. They will practice strategies and action steps to recognize and mitigate implicit bias in organizational collaboration and decision-making. The workshop is delivered over a video conferencing platform in several 60-90 minute modules using a combination of slides, videos and virtual interactive activities.

Learning Objectives:
- *Enhance knowledge of diversity and inclusion in the context of leadership*
- *Explore the neurology of bias*
- *Understand the impact of bias on decision-making*

4.2. The Leadership Challenge® Workshop (Fraser)

The Leadership Challenge® Workshop offers a proven path to guide the participant's journey to individual and cultural leadership change. This immensely practical and hands-on experience is designed to inspire, engage, and help participants develop the leadership skills needed to meet whatever leadership challenges lay ahead. The LPI® (Leadership Practices Inventory) 360 Assessment would be completed by all workshop participants at least ten days prior to program kickoff. The core curriculum is structured around seven components, including five independent modules, 3.5 on-line hours each, that focus specifically on each of The Five Practices of Exemplary Leadership®: Model the Way, Inspire a Shared Vision, Challenge the Process, Encourage Others to Act, and Encourage the Heart. These five virtually delivered modules will be conducted with a minimum of one day between sessions to accommodate participant work schedules, individual coaching as required, and short homework assignments.

Learning Objectives:
- *Identify their leadership strengths and weaknesses with the results of their LPI®*
- *Clarify and communicate their fundamental values and beliefs*
- *Set the example for others by aligning their actions with shared values*
- *Express their image of the future*
- *Inspire others to share a common vision*
- *Search for opportunities to change and improve*
- *Experiment with innovative ideas and learn from accompanying mistakes*
- *Build collaboration, teamwork, and trust*
- *Strengthen the ability of others to excel*
- *Recognize the accomplishments of others*
- *Apply the lessons learned in the workshop to a significant current organizational challenge*

4.3. Intentional Leadership (Fraser)

The basis of the course is that, "Intentional Leaders have deep self-knowledge and recognize that their strengths come with blind spots. They know that every situation draws on their talents in ways that bring out inevitable limitations." (Intentional Leadership by Jane Kise). This virtual six-hour workshop is split into two three-hour on-line modules to be delivered on two separate days with one day between to accommodate work schedules, provide time for minimal homework and intensify learning and future application.

Learning Objectives:
- *Apply the three pillars of Intentional Leadership to a significant current organizational challenge including leading specific initiatives, transitioning to a new position or developing skills such as project planning or time management.*
- *Work with the Intentional Leadership framework to clarify their strengths and related blind spots. Learn to go beyond their personality type 4-letter code to understand their potential challenges and developmental strategies.*

KA INSTITUTE
PROGRESS THROUGH LEARNING

- Explore Emotional Intelligence and the so-called "soft" skills from which as much as 70% of their success comes and are to develop.
- React appropriately to Polarities (Paradoxes, Dichotomies, Dilemmas) which exist when both sides hold part of the truth and if not recognized, result in making "false choices." And understand how polarity thinking tools access the power of "both/and" thinking and learn how to leverage polarities to get stakeholders to work together toward common interests.
- Utilize the 12 Lenses of Leadership, integrating identified polarities, their personality type and emotional intelligence to arrive at their personal Intentional Leadership Focus, which captures their priorities in key phases that provide continuous guidance.
- Reapply the Intentional Leadership framework to all current and future leadership challenges.

5. Other Virtual Classes

5.1. Advanced Body Language Secrets (Ulrich)

Uncovering the mysteries of body language—how people communicate their thoughts and feelings without saying a word—is a powerful first step toward mastering any professional and social situation. All successful people know that the ability to detect and react to the split-second signals that skim across people's bodies hundreds of times each day is crucial to getting what they want in life. This online, interactive keynote will inspire you to look at how you lead differently. Online Attendees will be better prepared to perform as a persuasive communicator, problem-solver, and be perceived as confident and powerful in difficult situations.

Learning Objectives:
- *Tune up their power gestures and steer the direction of the organization down a path of increased success. Spot discomfort and deviations in hidden facial expressions and take immediate action to decrease the person's concerns.*
- *Discover how they are sitting in a formal or informal meeting will hurt or help their chances of being perceived as a leader!*
- *Spot the business stances that convey power, authority, nervousness, passivity, and respect and get the team moving in the same direction.*
- *Stop making the biggest mistakes that all level of employees and even executives do that make their bosses nervous - nobody succeeds when they have a nervous boss.*
- *Exercise appropriate body language: learn executive level hand gestures and solid body stances to remain in control and on task, avoid emotionally charged facial micro-expressions, and ultimately decrease tension and instantly increase the level of respect people have for you*

5.2. Using Improvisation to Open Opportunities for Success (Ulrich)

Today's work environment is constantly changing, presenting multifaceted challenges for you as a leader. You are constantly dealing with questions such as: how can I make the best decisions, how can I empower my team to achieve common goals, or how can I be an effective leader when facing unprecedented levels of uncertainty? In a word: Improvisation. The art of improvisation hones your confidence, focus, agility and adaptability when operating in uncertainty. Improvising will increase you and your team's ability to find opportunities for creative problem solving and effective action when there is no obvious path forward. Above all, improvisation—often the same tools used by actors and comics — to be a powerful communicator, selfless listeners, acute observers and team-oriented collaborators—can guide a leader to create new opportunities in spite of the uncertainty. Online attendees will depart having learned the foundational skills of improvising in order to think fast on their feet and make adjusts in the moment putting themselves in position to succeed when confronting uncertainty. Whether new or returning from last year's session, educators will leave with a renewed understanding of how to use improvisation to enhance their leadership ability.

Learning Objectives:
- *Accurately assess any given situation and confidently move forward in a positive direction through enhanced awareness and engaged listening.*

- *Increase their innate talent and ability to think and act fast in a crisis situation gaining the trust of colleagues, staff and clients.*
- *Discover how the foundational improv concept of Yes And can help you cut through chaotic work situations or personal obstacles to create greater clarity, while fostering teamwork, trust and collaboration with others.*
- *Increase self-confidence and the desire to take creative risks, while decreasing critical self-judgment or fear of failure that can undermine the potential for success*

6. VIRTUAL EXECUTIVE COACHING

"COACHING IS UNLOCKING A PERSON'S POTENTIAL TO MAXIMIZE THEIR OWN PERFORMANCE. IT IS HELPING THEM TO LEARN RATHER THAN TEACHING THEM."
- **TIM GALLAWAY**

In these times of social distancing due to the coronavirus pandemic, many organizations are requiring their workforce to stay at home and to work remotely. This forced isolation can deprive executives, managers, supervisors, and staff access to normal channels in the workplace for mentoring, guidance, advice, and other forms of support to help them do their jobs effectively and efficiently. In this context, KAI is pleased to provide seasoned executive coaches who can provide one-on-one or small group coaching to personnel who may need remote support. Using telephone sessions or video conferencing platforms like Skype, WhatsApp, FaceTime, and Zoom, KAI's executive coaches can help with a variety of issues. The coaching method and interactions that occur will vary by each situation, the style and philosophies of the Executive Coach and the chemistry between the Executive Coach and his or her client.

Despite these variations, the following are some themes that can be addressed during these sessions:

- Ideas for improvement - reviewing assessment feedback, discussion of past successful or unsuccessful efforts for improvement and providing support for exploring new behaviors.

- Role-playing - practicing and experimenting with possible responses to anticipated situations to polish skills and build comfort with new behaviors.

- Solving problems - stimulating creative problem solving by asking probing questions and partnering in brain storming solutions to real work challenges.

- Visioning - helping the client envision what successful behavior looks like.

- Strategies for building support - increasing chances of success by identifying ways of enlisting support from colleagues regarding desired change and continued feedback as new behaviors are put into practice.

Coaching sessions are provided in increments of 60 minutes, with discounts available for purchases of 10 hours or more.

KAI INSTITUTE
PROGRESS THROUGH LEARNING

INQUIRIES AND ORDERING INSTRUCTIONS

The courses described in this catalog are intended to be delivered using a variety of standard video conferencing platforms – e.g. Zoom, Skype, Webex, and GoToTraining. Each course is live streamed by our seasoned facilitators, with real-time presentations, real-time student participation, and real-time class exercises.

The duration of each course is adjustable according to client needs, ranging from 60 minutes to 4 hours. KAI's virtual courses can be ordered individually or in multi-course packages that are configured specially for client requirements. KAI coaching hours may be ordered in any amount, with discounts provided for blocks of 10 hours or more per person.

Some stand-alone courses do not require any additional material by class participants. Others may require pre-readings, books, guidebooks, or the administration of on-line individual or 360° assessments.
Because of the interactive and participatory nature of KAI's live-streamed virtual courses, class sizes are generally limited to a minimum of 12 to a maximum of 30 participants.

If you are interested in any of the virtual course offerings or coaching services described in this catalog, please send an email to:

Bel Leong-Hong
President, Knowledge Advantage Inc.
bel@kaiglobal.com
(301) 948-1682

FOR VIRTUAL COURSES, please indicate (a) the title of the virtual course or courses, (b) the number of participants anticipated, and (c) the time frame desired for virtual training delivery.

FOR VIRTUAL COACHING, please indicate (a) the general nature or reasons for the coaching requested; (b) the job experience level of the proposed coaching clients; and (c) the number of coaching hours requested.

We will respond as soon as possible regarding availability of the relevant facilitators/coaches and a description of any assessments, books, and other material that may be required for the course requested. We will work with you to configure KAI's virtual courses and coaching to your specific requirements. Prices are competitive and will be set below government credit card thresholds to allow for direct purchases. Volume discounts are available.

KAIINSTITUTE
PROGRESS THROUGH LEARNING