

# B E R T E I G

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Real Agility™  
Management Track



# The Manager's Dilemma: Stress

Executives hold you accountable for results but your staff resent your efforts to achieve them.

You try to support your staff but your executives reject your ideas.

You're worried you aren't bringing any value and you can't imagine that your future will be any better.

Being a manager is stressful and you feel like you can't even celebrate or brag about it!

You are meant for more.

# The Manager's Dilemma

The BERTEIG Real Agility™ Management Track training and coaching program helps you realize the incredible potential of being a manager.

Being a manager can be the most fulfilling, significant, value-creating role in an organization.

Give your executives outstanding results, and create an exciting, meaningful work environment for your staff, while leaving behind your stress and gaining energy and pride.

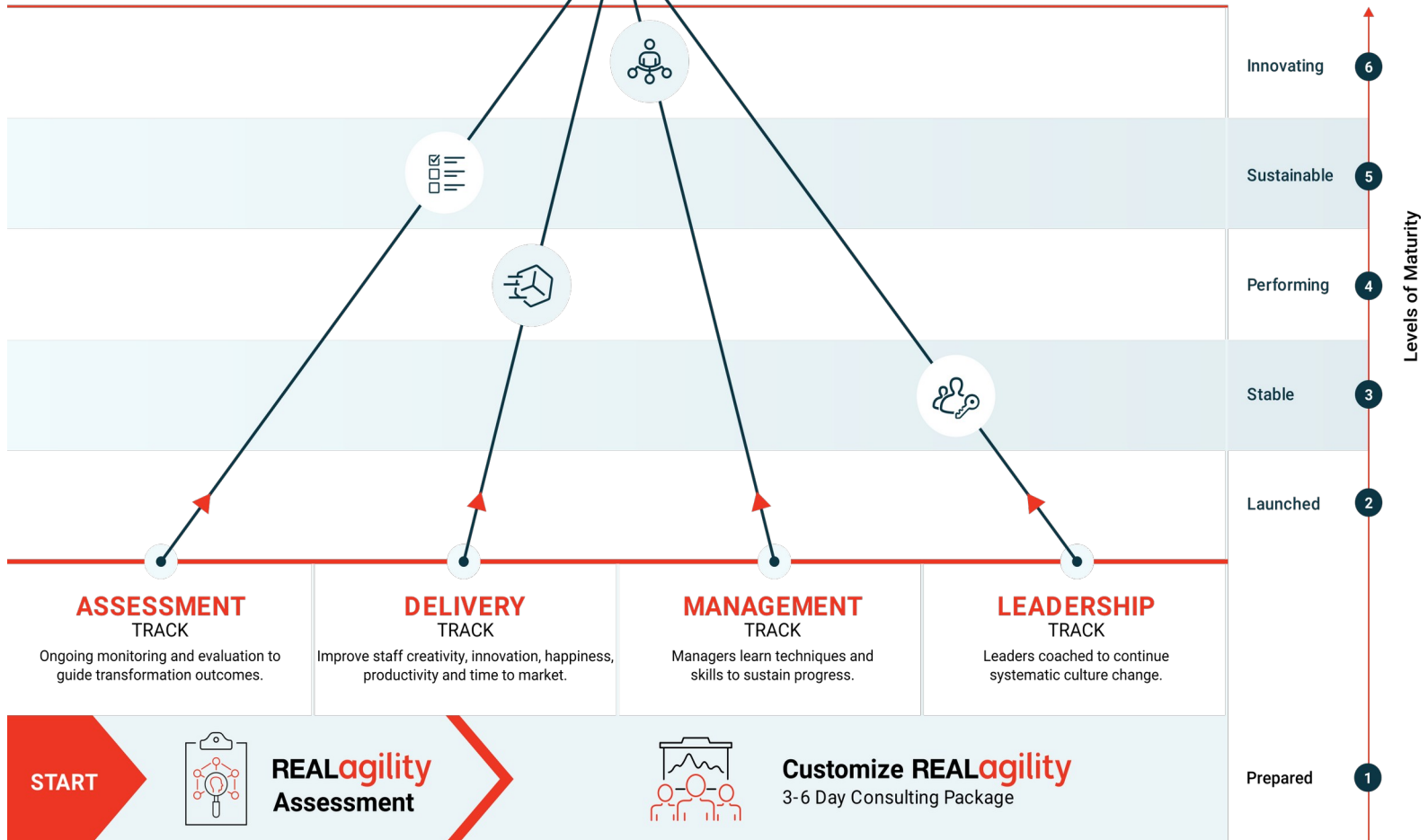
BERTEIG gives you the skills, tools and mindset so that you'll feel like you can yell from the rooftops "I AM A MANAGER!" with joy.

# Management Track Overview

- The Real Agility™ Management Track is a systematic educational program to help managers advance and sustain transformation in their organization.
- The Management Track has been tested and refined since it was first used in 2005 at Capital One.
- The Management Track has 5 milestones: Application Approved, Practitioner I, Practitioner II, Elite Manager I and Elite Manager II.

# REALagility

- Lasting Change
- Faster Delivery
- Less Waste



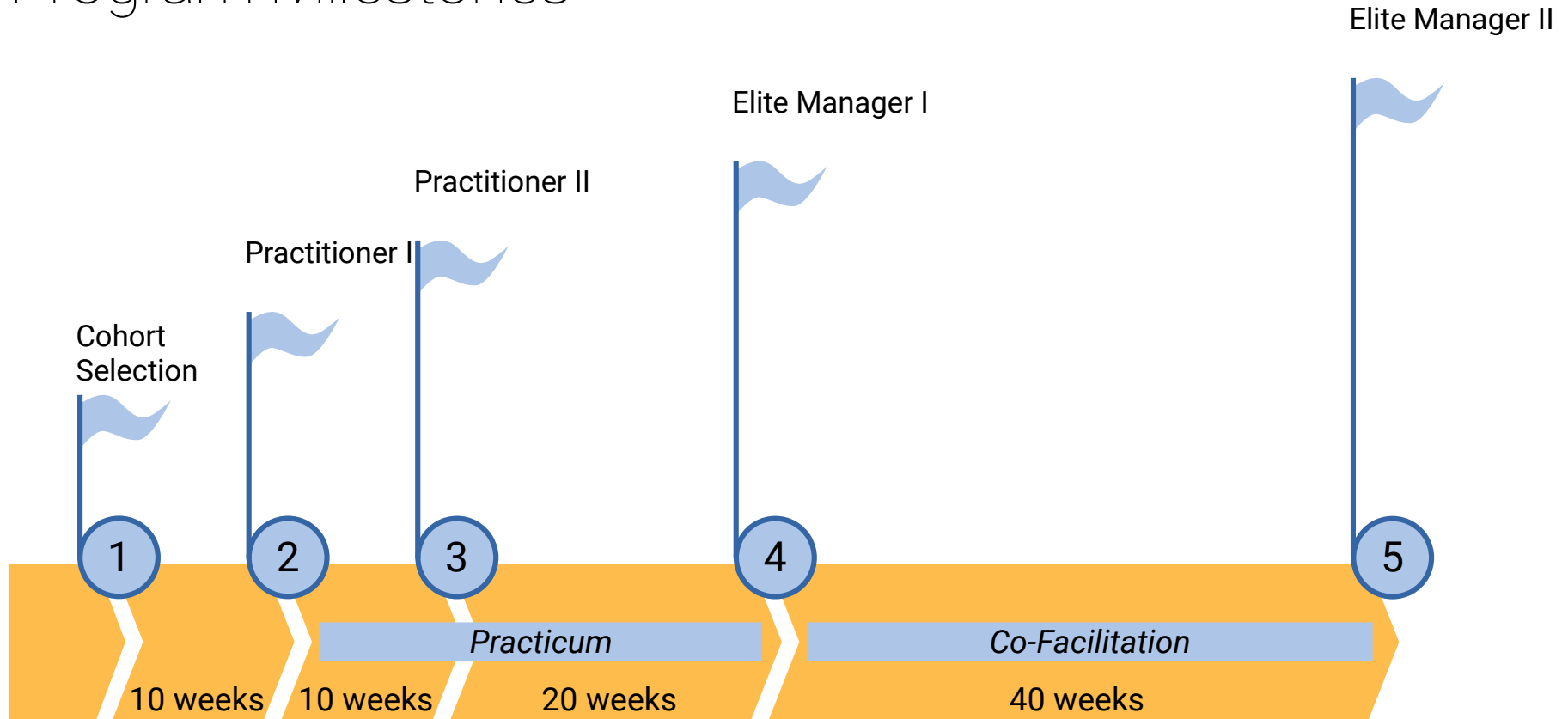
# Management Track Benefits

- **For your organization:**
  - Organizational agility, execution on strategic goals and initiatives
  - Bottom and top-line benefits (details in the Financials section later)
  - Happier, more engaged staff (lower turnover, better quality results)
- **For the participants:**
  - Eliminate the stress of being a manager
  - Contribute massive value to your executives and staff
  - Energy and pride: “I AM A MANAGER!”

# The Management Track Milestones:

- 1) Application Approved: becoming a participant
- 2) Practitioner I – team launches and quick wins
- 3) Practitioner II – coordinating across teams, resetting failed teams, ready for challenges
- 4) Elite Manager I – transform the department and mentor junior managers
- 5) Elite Manager II – ready to run the Management Track yourself

# Program Milestones





# 1

## Milestone 1: Cohort Selection

- The program is 40+ weeks in duration to “Elite Manager I” and 80+ weeks to “Elite Manager II”
- Participants must have 16 hour per week available for the program, and must be present for 1 day per week of the program
- Sponsors must fully support all participants in the program
- Participants must successfully complete activities and other assignments to graduate

# Milestone 1: Cohort Selection - Process

- 1) Invitation for eligible managers to apply
- 2) Experience filtering
- 3) Candidate coaching profile evaluation
- 4) Cohort composition by ranking
- 5) Candidate and sponsor commitment

# 2

## Milestone 2: Practitioner I

- After 10 steps of the program, successful participants receive an “Practitioner I” certificate
- Expected to:
  - Work as a manager for a single team under the supervision of a Elite Manager I using a structured team development program
  - Continue to the next stage of the program leading to Practitioner II

## Milestone 2: Practitioner I – Learning Topics

- 1) Real Agility Conceptual Framework
- 2) Agile and Software Dev.
- 3) Corporate Culture and Agility
- 4) Complex Systems
- 5) Team Agility
- 6) Teams and Resources
- 7) Intro to Mentoring & Training
- 8) Intro to Facilitation
- 9) Intro to Coaching & Retrospectives
- 10) Launching Teams

# 3

## Milestone 3: Practitioner II

- After an additional 10 steps (20 in total), successful participants receive a “Practitioner II” certificate
- Expected to:
  - Work independently with multiple teams simultaneously
  - Work with teams in crisis or non-ideal environments
- May apply to the next stage of the program leading to Elite Manager I (qualification is strict)

## Milestone 3: Practitioner II – Learning Topics

- 1) Intro to Systems Thinking
- 2) Systems Thinking In-Depth
- 3) High-Performance Teams
- 4) Dealing with Crisis and Conflict
- 5) Customer Focus
- 6) Facilitating Change
- 7) Lean and Continuous Improvement
- 8) Org. Change In-Depth
- 9) Learning and Motivation
- 10) Flow of Value

# 4

## Milestone 4: Elite Manager I

- After an additional 20 steps (40 in total), successful participants receive an “Elite Manager I” certificate
- Expected to:
  - Lead departmental improvements and large-scale delivery programs
  - Mentor managers working towards Practitioner I
- May apply to the next level of the program leading to “Elite Manager II” status (qualification is extremely strict)

# Milestone 4: Elite Manager I – Learning Topics

- 1) Large-Scale Agility
- 2) VUCA and Large Orgs
- 3) The Agile Ecosystem
- 4) Leading Change
- 5) Revisit Core Agile Methods
- 6) Change and Community
- 7) Business Agility
- 8) Rational Economics and Mgmt.
- 9) Changing Corporate Culture
- 10) Avoiding Bias
- 11) Communicating Change
- 12) Innovation and VUCA
- 13) Change and Governance
- 14) Systems Thinking and Governance
- 15) Learning Organizations
- 16) Competition and Culture
- 17) Complexity and Culture
- 18) Customizing Team Development
- 19) Customizing Transformation
- 20) Leading to Real Agility



## 5

## Milestone 5: Elite Manager II

- This stage requires Elite Manager I graduates to apply for limited spots
- Participants achieve Elite Manager II after successfully co-facilitating the first 40 steps of the program with a new cohort
- Expected to:
  - Launch and lead the Real Agility™ Management Track with new cohorts
  - Train new people to achieve Elite Manager II

# Financials – Net Savings per Elite Manager I

## Net savings of internal staff vs. external contract coach

- Cost per candidate: \$30,000 tuition, \$50,000 time investment (\$625/day, 80 days in program)
- Premium for external contract coaches: \$275,000 (\$2000/day less 625/day, 200 day work-year)
- Savings per year: **\$195,000/graduate**

# Financials – Net Benefit per Elite Manager I

Net benefit of coach for 50-person dept/program, conservative 10% efficiency improvement from coach

- Dept. labour cost: \$7.5M/yr
- Allocation to value before program: \$2.25M/yr (30% current efficiency)
- Dept. Value delivery before program: \$9.0M/yr (20% net profit)
- Allocation to value after program: \$3.0M/yr (40% resulting efficiency)
- Value delivery incremental improvement: 33%
- Dept. Value delivery after program: \$12.0M/yr
- **Net benefit of program per year: \$3.0M**

# Management Track Logistics

- Delivered virtually
- Milestone-based billing
- Cohort size: 12 to 24 people
- Limited audit spots
- Clear executive support
- Written commitment
- No part-time members

# Management Track Timeline

- Milestone 1: Cohort Selection and Application Approval (6 to 8 weeks)
- Milestone 2: Practitioner I (10 weeks)
- Milestone 3: Practitioner II (10 weeks)
- Milestone 4: Elite Manager I (20 weeks)
- Milestone 5: Elite Manager II (40 weeks)

# Management Track Pricing and Billing Milestones

- Pricing (excludes expenses and applicable taxes):
  - Milestone 1: Cohort Selection and Application Approval, CA\$50,000
  - Milestone 2: Practitioner I, CA\$30,000 + CA\$5,000/participant
  - Milestone 3: Practitioner II, CA\$30,000 + CA\$5,000/participant
  - Milestone 4: Elite Manager I, CA\$60,000 + CA\$10,000/participant
  - Milestone 5: Elite Manager II, CA\$25,000/candidate (4 candidates)
  - Estimated Total (12 participants): CA\$510,000
- Billing milestones:
  - Milestone 1, CA\$ 50,000
  - Billing after every 5 steps of each subsequent milestone, CA\$15,000+CA\$2,500/participant