



Journey of Excellence<sup>™</sup>  
**LEADERSHIP DEVELOPMENT SERIES**

*One-on-one individualized coaching for every level of the organization.*





## **We believe in people and their potential for success at work and in the world.**

Since 2006, we have worked with organizations who want to maximize the potential of their people. We partner with those who understand:

- People make the difference. More than any other variable, the development of human resources is key to greater growth and profits for both the individual and the organization.
- People will willingly accomplish great things given the right support, the right tools, and the right kind of leadership.
- People development includes both the personal and professional life. Personal development heightens participant interest, and positive behavioral change immediately impacts professional performance.

Life-changing development is a process, not an event. We work with participants over a period of time — once weekly for several weeks with follow up sessions — to maximize effectiveness. We use spaced repetition to internalize knowledge, stimulate natural application, and create measurable bottom-line results.

**Our one-on-one coaching programs are designed to meet the individualized development needs at every level in the organization. Your organization will develop a culture where continuous improvement, higher levels of achievement, standards of excellence, and exceeding customer expectations prevail.**

YOUR ORGANIZATION'S  
BIGGEST ASSET IS YOUR PEOPLE.

Their knowledge, resourcefulness, and creativity  
translate directly into earnings.

EVERYONE BENEFITS WHEN YOU INVEST IN  
DEVELOPING PEOPLE AND HELP THEM DISCOVER,  
DEVELOP, AND ACHIEVE THEIR REAL POTENTIAL.

You help create enthusiastic people who enjoy their jobs  
and their lives, which results in enhanced performance  
and profitability for both the individual and organization.

AS PEOPLE ARE DEVELOPED,  
THE ORGANIZATION WILL GROW.

# SERIES OVERVIEW

## JOURNEY OF EXCELLENCE™

Our Journey of Excellence programs are intense and rewarding development experiences that lead individuals to higher plateaus. Participants discover and refine their leadership strengths, identify areas for personal and professional growth, and are guided in ongoing development. In turn your organization benefits as increased internal motivation drives employees forward. They gain a clear vision of how to change attitudes and habits, set goals, overcome obstacles, and achieve results both personally and for the organization.

### CORE PROGRAMS

*Core Programs provide individualized coaching in areas critical to personal and professional success.*

#### Leadership Foundations

Competencies learned offer the necessary foundation for future personal and professional growth and increases effectiveness and influence with others.  
*8 weekly sessions (1 hour each)*

#### Leadership Foundations Plus

Provides foundational leadership development for increased effectiveness and influence, plus two essential soft skill Focal Points for further development.  
*12 weekly sessions (1 hour each)*

#### Leadership Premier *Signature Program*

Our most comprehensive program, providing foundational leadership development and six essential soft skill Focal Points for further development.  
*12 weekly sessions (9, 2-hour and 3, 1-hour)*

### FOCAL POINTS

*Focal Points provide 3-session coaching opportunities for further soft skill development.*

**Interpersonal Communication**  
**Emotional Intelligence**  
**Understanding Motivation**

**Time Management**  
**Decision Making**  
**Strategic Life Planning**

**Stress Management**  
**Resolving Conflict**  
**Customer Service**

**Communication Flexibility**  
**Leadership Dashboard**  
**Coaching for Success**

### MILESTONE PROGRAMS

*Milestone Programs provide next-level leadership coaching for supervisors, managers, salespeople, and executives.*

#### Leading Your Team

Helps managers and supervisors recognize their role in fostering unity and developing the talents of the team to cultivate engagement and motivation in those they lead.  
*10 weekly sessions (1 hour each)*

#### Sales Development

Whether a seasoned professional or a new trainee, the techniques learned within this program will increase sales effectiveness and profits for your organization.  
*6 weekly sessions (4, 2-hour and 2, 1-hour)*

#### Executive Leadership Coaching

Executives and managers will benefit from bimonthly, highly personalized coaching sessions based on their identified needs.  
*Up to 12 sessions over 6 months, renewed every 6 months. (40-60 min. each)*

# CORE PROGRAMS



**Individuals begin by participating in a Core Program from one of three options:**

- Leadership Foundations
- Leadership Foundations Plus
- Leadership Premier

Participants are guided to discover their leadership strengths, identify areas for growth, and develop a strategic plan for both personal and professional success.

Our core programs emphasize the attitudes, skills, and goals needed to help individuals be better equipped to lead themselves and others. We challenge people to look beyond the obvious and become the best they can be; to develop a vision and to set specific and measurable goals. They will ask themselves: What are my hopes and dreams? What values are important to me? What kind of relationship do I want with superiors, peers, subordinates, customers, suppliers, friends, and family? What kind of leader do I want to be?

## **Methods for Learning and Implementation**

- One-on-one Coaching Sessions
- Leadership Readings and Exercises
- Goal Planning Tools
- Weekly Action Steps
- Assessments
- Follow Up Sessions for Coaching and Accountability

# CORE PROGRAMS (CONT.)

## Our Signature Program

### LEADERSHIP FOUNDATIONS

**Recommended for:**

Frontline Staff and  
Key Individual Contributors

**Commitment: Eight weekly sessions**

- 1 DISC Assessment Debriefing (60 Min)
- 6 Coaching Sessions (60 Min)
- 1 Follow Up Coaching Session (30-60 Min)

**Coaching Topics include:**

- Self-Leadership
- Discovering Strengths and Growth Areas
- Success Attitudes and Habits
- Understanding Self and Others
- Identifying Core Values
- Goal Setting for Work and Personal Life
- Self-Confidence and Self Awareness
- Cultivating a Growth Mindset

**Assessments:**

- DISC Behaviors (Communication/Productivity)
- Competencies (Workplace Soft Skills)
- Self-Assessment of 6 Key Life Areas

Six months of monthly email follow-up reinforcing program topics.

### LEADERSHIP FOUNDATIONS PLUS

**Recommended for:**

All levels in the organization including  
Emerging Leaders and Supervisors

**Commitment: Twelve weekly Sessions**

- 1 DISC Assessment Debriefing (60 Min)
- 9 Coaching Sessions (60 Min)
- 2 Follow Up Coaching Sessions (30-60 Min)

**Coaching Topics include:**

- Self-Leadership
- Discovering Strengths and Growth Areas
- Success Attitudes and Habits
- Understanding Self and Others
- Identifying Core Values
- Goal Setting for Work and Personal Life
- Self-Confidence and Self Awareness
- Cultivating a Growth Mindset

**Assessments:**

- DISC Behaviors (Communication/Productivity)
- Competencies (Workplace Soft Skills)
- Self-Assessment of 6 Key Life Areas

**2 Essential Focal Points:**

- Interpersonal Communication
- Strategic Planning for Life

Six months of monthly email follow-up reinforcing program topics.

### LEADERSHIP PREMIER

**Recommended for:**

All levels of the organization including  
Salespeople, Managers and Executives

**Commitment: Twelve weekly sessions**

- 1 DISC Assessment Debriefing (60 Min)
- 9 Development Sessions (120 Min)
- 2 Follow Up Coaching Sessions (30-60 Min)

**Coaching Topics include:**

- Self-Leadership
- Discovering Strengths and Growth Areas
- Success Attitudes and Habits
- Understanding Self and Others
- Identifying Core Values
- Goal Setting for Work and Personal Life
- Self-Confidence and Self Awareness
- Cultivating a Growth Mindset

**Assessments:**

- DISC Behaviors (Communication/Productivity)
- Competencies (Workplace Soft Skills)
- Driving Forces (Motivation)
- Self-Assessment of 6 Key Life Areas
- EQ Assessment
- Active Listening Scale

**6 Essential Focal Points**

Participant coached in 6 Essential Focal Points for comprehensive soft skill development.

- Interpersonal Communication
- Emotional Intelligence
- Understanding Motivation
- Time Management
- Decision Making
- Strategic Planning for Life

One year of monthly email follow-up reinforcing program topics.

CORE PROGRAM participants may continue their leadership development at any time with our selection of FOCAL POINTS and MILESTONE PROGRAMS on pp. 6-10.



# FOCAL POINTS



**Focal Points provide 3-session coaching opportunities for further soft skill development.**

*Each session is up to 60 minutes in length.*

**Prerequisite:** Any Core Program

## **Interpersonal Communication\***

An individual's ability to listen and understand directly impacts effectiveness both professionally and personally. Participant will be introduced to the basics of effective communication with an emphasis on active listening, asking powerful questions, and seeking first to understand and then be understood.

## **Time Management\***

Effective time management allows for maximum productivity and the ability to accomplish the desired vision. Sessions will address time management methods and productivity, along with the use of a detailed time analysis tool. This provides a remarkably accurate picture of current use of time in the workplace and enables the individual to make any necessary modifications.

## **Understanding Motivation\***

Motivating self and others is paramount to successful leadership. Participant will explore methods of motivation and the importance of "why." They will discover the power of meeting human needs. The Driving Forces assessment will be discussed as it examines motivation on six dimensions: knowledge, utility, surroundings, others, power and methodologies.

## **Emotional Intelligence\***

Superior performers have well-developed emotional intelligence skills, making it possible to work well with a wide variety of people and to respond effectively to changing conditions. Sessions address self-awareness, self-regulation, social awareness and relationship management. An EQ Assessment will measure participant's ability to sense, understand and regulate self and social situations.

## **Decision Making\***

Leaders are faced with decisions every day and the importance of quality decisions in a reasonable time have never been greater. Participants will be introduced to the decision-making process and will explore their own decision-making style, habits, and emotions that may impact effectiveness. Strategies that increase problem solving ability and help overcome personal bias will be discussed.

## **Strategic Planning for Life\***

Great leaders live life with intention. Participants develop a greater understanding of who they want to be and where they want to go. They will dive deeper into their own sense of self, create a personal purpose of life statement and develop a vision for six key life areas. They will be equipped with a system for ongoing strategic life planning that includes the vision, purpose, core values and goals for their life.

*\*Included in the Leadership Premier Core Program on p. 5.*



## Resolving Conflict\*\*

The ability to successfully resolve conflict is a necessary skill for all leaders. These sessions will help the participant to prepare for and engage in crucial conversations that foster agreement on important matters. Participants will explore their own conflict management style and learn the internal and external dialogue necessary for effectively negotiating conflict. In turn, this positively impacts relationships and productivity.

## Stress Management

Some stress in life and work is normal, however, excessive stress can obstruct productivity and impact physical/emotional health. A leader's ability to deal with it can mean the difference between success and failure. These 3 coaching sessions will help identify sources and symptoms of stress, address work-life balance, provide tools for handling stress in the moment, and help build long-term strategies for a more fulfilling life.

FOCUS.  
DIGEST.  
PRACTICE.  
REFINE.

## Customer Service

Participants will assess points of connection in the customer interaction process and learn how to turn those points of connection into positive outcomes for their customers. They will gain a greater understanding of their role in exceptional customer service. They will identify their external and internal customers and learn how their service to them impacts the success of the entire organization.

## Leadership Dashboard

The Leadership Dashboard is a tool to help leaders gain clarity on what matters most for their success and helps them get focused on spending their valuable time on the initiatives and relationships that will have maximum impact. Participants will create a one-page strategy for their area of responsibility which will help uncover opportunities for next steps in their role as a leader.

## More on Decision Making

Good decision making can be easily disrupted by bias and irrationality. Leaders may get stuck agonizing over decisions or fail to think outside the box for better alternatives. Using the tools provided in the book, *Decisive*, participants will be introduced to strategies to counteract their own decision-making shortcomings and will become better equipped to lead their teams in effective decision-making.

## Communication Flexibility

A leader's effectiveness suffers when they only utilize one or two communication styles. Participants will learn to apply 7 approaches to communication. They will discover which approach to choose for the greatest impact and explore the variety of communication vehicles available in their setting. Methods will be practiced through case studies and the leader's ongoing communication opportunities.

## Coaching For Success

Provides coaching, support, and accountability for the individual's desired goals and outcomes. Time will be spent discussing weekly achievements and challenges, identifying how to overcome obstacles, and determining the right steps to move forward toward success. (This focal point provides 150 minutes of coaching over 3-5 sessions. Length of each session will be determined by need.)

## Customized Focal Point

Looking to reinforce or educate your people on a topic uniquely specific to your organization? Let's visit to discover how Dillman Associates can come alongside and build a customized Focal Point to meet your company's development needs.

\*\*Included in the *Leading Your Team Milestone Program* (p. 8)

# MILESTONE PROGRAMS

## LEADING YOUR TEAM

Today's team leader is perhaps even more critical to the success of the organization than ever before. An organization is effective only when employees are working at top efficiency and productivity. Our Leading Your Team program propels the participant forward to next-level leadership. It encourages leaders to recognize their role in fostering collective unity and developing and utilizing the talents of the team. This process focuses on leading with influence in order to cultivate an engaging and motivational environment.

**Recommended Prerequisite:** Any Core Program

### Topics

- Understanding Your Role
- Successful Team Building
- Developing Trust
- Sustaining Performance
- Communication
- Creating a Growth Environment
- Organizational Goal Setting
- Employee Evaluations
- People Development

### Resolving Conflict Focus

The ability to successfully resolve conflict is a necessary skill for all leaders. These sessions will help the participant to prepare for and engage in crucial conversations that foster agreement on important matters. Participants will explore their own conflict management style and learn the internal and external dialogue necessary for effectively negotiating conflict. In turn, this positively impacts relationships and productivity. Includes all content from our Resolving Conflict Focal Point on p. 7.

### Management Strategies Development

- Refining Departmental Onboarding Process
- Creating a Performance Management Plan
- Identifying Conflict Resolution Strategies

### Follow-up Sessions

These one-hour sessions include coaching and accountability for goals set by the participant. They also provide opportunity for continued leadership and soft skill development.

### Recommended for:

Supervisors and Managers

### Commitment:

#### Ten weekly Coaching Sessions

- 8 Development Sessions (60 Min)
- 2 Follow-up Sessions (30-60 Min)

### Methods for Learning and Implementation:

One-on-one Coaching Sessions

Weekly Leadership Readings

Weekly Action Steps

*Crucial Conversations* Book Study

Management Strategies Development

### Post-program:

- Six months of monthly email follow-up reinforcing program topics and suggesting additional steps for continued growth
- Opportunity to continue the development journey with a variety of our additional leadership offerings

## SALES DEVELOPMENT

Whether selling a product or service, whether representing a well-known and established company or a start up, one fact remains clear; it is unlikely you will maintain your competitive advantage unless you continue to improve your ability to attract and keep customers. Whether you are experiencing this process as a seasoned professional or a new trainee, the techniques and ideas within this Sales Development milestone can and will help you improve, become more effective, and increase profits for your organization.

**Prerequisite:** Any Core Program

### Topics

- DISC Behaviors in Sales
- Advanced Prospecting
- Getting Appointments
- The Introduction
- Discovering Wants and Needs
- Building a Case for Action
- Presenting Benefits/Consequences
- Overcoming Objections
- Getting Commitment
- Follow-Up

### Sales Strategy Index Coaching

The SSI presents 54 "real-life" sales situations which are used to reveal an individual's strengths and weaknesses, and how well they understand sales strategy.

### Annual Sales Plan Development

Sales professionals spend too much time reviewing who they've seen and who needs to be seen. An annual sales calendar requires one, two-hour planning session/year. Those who stay with their plan do not need to "look back" to know "where they are going."

### Follow-up Sessions

These one-hour sessions include coaching and accountability for goals set by the participant. They also provide opportunity for continued sales development.

### Recommended for:

Sales and Marketing Professionals

### Commitment:

#### Six weekly Coaching Sessions

- 4 Development Sessions (120 Min)
- 2 Follow-up Sessions (30-60 Min)

### Methods for Learning and Implementation:

One-on-one Coaching Sessions  
Weekly Sales Readings  
Weekly Action Steps  
Annual Sales Plan Development  
Sales Goal Planning Tools  
Sales Strategy Index Assessment

### Post-program:

- Six months of monthly email follow-up reinforcing program topics and suggesting additional steps for continued growth
- Opportunity to continue the development journey with a variety of our additional leadership offerings

## EXECUTIVE LEADERSHIP COACHING

Our Executive Leadership Coaching sessions are explorative and solutions focused, so that you achieve the results you desire and attain ongoing success. We come alongside to facilitate enhanced work performance and soft skill development that will help you navigate the complex circumstances you face on a regular basis. We help you maximize your leadership potential and work smarter to achieve desired results. Improved performance will have a direct and positive influence on those you lead, and ultimately contribute to the success of the organization.

**Recommended Prerequisite:** Any Core Program and Leading your Team Program

### Topics discussed are customized to your current needs and could include:

- Specific work projects and/or organizational decisions
- Leadership skill gaps like communication, time management, delegation or decision making
- Navigating difficult situations/people
- Personal life situations that impact performance
- Limiting or destructive thought patterns
- Work-life balance, overwhelm and stress

### Your coach will:

- Actively listen and ask questions to not only understand, but help you gain greater clarity as you seek solutions to overcome obstacles
- Promote exploration and out of the box thinking
- Help you establish goals and the necessary action steps to get there
- Provide accountability to your commitments
- Be confidential and non-judgmental

### Verbal 360° Survey & Feedback (Optional)

Our Verbal 360° survey involves confidential interviews with those with whom the employee frequently interacts followed by a one-on-one feedback session with the employee. Managers and executives gain tremendous personal benefit as they see how their leadership style and methods are perceived by those they manage. They will gain a clearer understanding of their workplace performance, strengths and weaknesses, interpersonal communication, and management style. As they make adjustments to better interact with and manage their employees, the entire organization benefits.

### Recommended for:

Managers and Executives

### Commitment:

Up to 12 sessions over 6 months. Renewed every 6 months.  
(40-60 min. each)

### Methods for Learning and Implementation:

One-on-one Coaching Sessions

Verbal 360° survey and additional assessments, as needed

Email access for coaching throughout program (24 hour response)

100% Tailored to Individual Need

Flexible Scheduling

### Possible Outcomes:

- Better manage staff through increased effectiveness
- Embrace feedback for improvement
- Improve problem solving abilities
- Enhance team building capabilities
- Enhanced leadership style
- Positively impact organizational culture

## WHAT OUR CLIENTS SAY...



Our participants have learned the value of goals, both personally and professionally, time management, communication and decision making. Our team is better equipped to lead, develop and support their employees and one another. These programs allow our team to be exposed to the same philosophies which enhances our communication with one another. With the benefits gained, we continue to use this resource in the training of new employees involved in sales or leadership roles. The participatory style of the program allows for behavioral change, not just knowledge gain.

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Alan W., Chief Operating Officer  
Leadership Premier and Sales Development



The leadership and sales process offered by Dillman Associates is a tremendous program dedicated to advancing the success of individuals and organizations. I am honored to have participated in the course and take away a plethora of tools, ideas, and strategies necessary to obtain success in every area of my life.

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Wade P, Vice President and Branch Manager  
Leadership Premier and Sales Development



This has been an incredible journey to say the least. I want to start by thanking [the agency owners] for the opportunity to be involved with this program. I would also like to thank my coach for guiding me along this journey. I have been a part of many leadership programs in the past and this program has been one of the best for sure. I know myself and my tendencies very well, and what is great about this program is that it has helped me act on my skills to accomplish my dreams for my personal life and career. Each aspect of this training has been impactful in certain ways to my life and will continue to encourage me to be a better person, a better contributor to those around me and a better member to the families (work and personal) that I'm a part of.

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Chris S., Insurance Agent  
Leadership Foundations Plus



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Since completing this program I am confident I have the ability to take on my new role and grow to become the best I can be. I have gained confidence and a positive attitude. I vow to not stop here, but to use these resources to continue my journey to be successful and to lead others.

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Haley H., Loan Officer  
Leadership Premier and Sales Development

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We dug deep into the assignments and discovered how the principles work in real life. This has been one of the most fulfilling experiences in a work setting that I can remember.

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Dustin W., Loan Officer  
Leadership Premier and Sales Development

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I truly value the guidance that was provided. Since this journey was a one-on-one process, it allowed me to grasp more of everything. There was a statement I found pivotal for my future, "You can go wherever you choose on your life's journey, but you can only start from one place. You can only start from where you stand today".

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Kenna F., Credit Analyst Associate  
Leadership Premier

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Part of being a great leader is seeing something in a person that they may not see in themselves. I loved the concept of "looking for the diamonds in others." Others will change as we change our thoughts about them.

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Megan J., Human Resource Assistant  
Leadership Premier

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We always hear people say that they want to be the best version of themselves, but very few take the time and initiative to develop the skills necessary for their personal and professional growth. I am grateful to work for a company that cares enough to provide me with the opportunity to become the best leader I can be in any job role, at work or outside of it. Throughout this course, I have discovered my leadership strengths, recognized areas for personal and professional growth, and developed a plan for my success.

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Grace H., Customer Service Representative  
Leadership Premier

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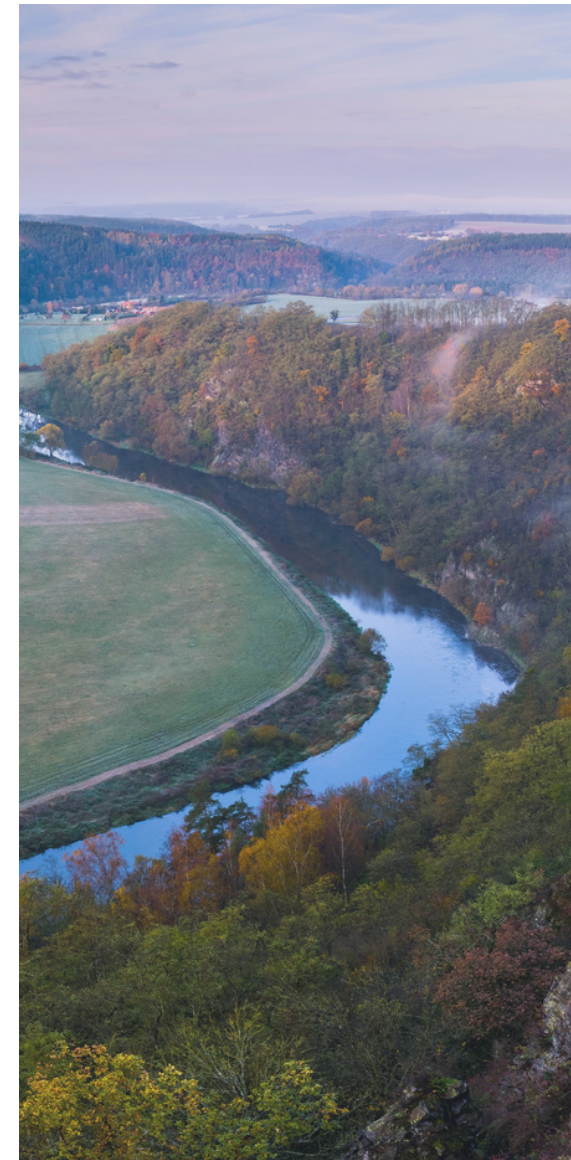
Overall, this leadership training has been a terrific experience. Before I started this program, I was feeling complacent. This program gave me the push I needed to feel motivated, and the tools to keep encouraging and motivating myself. The most impactful session was the session where leaders are made, not born. It helped me realize reaching my potential will not happen overnight and that in the end its important to enjoy the journey and continuously work towards your goals every day.

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Jamie W., Insurance Agent  
Leadership Foundations Plus

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Throughout the process I have become a better person. I have discovered who I am, including my strengths and weaknesses. I learned what true leadership looks like and where I could develop and constantly strengthen those skills in myself to become anything I want to be. My success will come through communication with others, improving myself, and achieving my goals. With this training I was given the tools to accomplish each of these.

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Brad T., Vice President of Lending  
Leadership Premier and Sales Development



## GUARANTEE

Dillman Associates provides a 100% satisfaction guarantee on all our programs. If, for any reason, you are not completely satisfied with the quality of our coaching programs, simply contact us within the first half of the program and tell us why. We will make things right or we will happily offer a refund less materials. We are confident our development opportunities are some of the most enjoyable, effective, and transformative programs you or your employees will ever experience.

## READY TO GET STARTED?

We will meet with you to assess your organization's needs and identify your goals. Then, we will create a customized and guaranteed program to develop employee potential, improve performance, and help achieve your organization's goals.

To explore the potential, reach out to us today!



Home Office:  
1900 Davis Ave., Gering, NE 69341  
(641) 745-0711

[www.dillmanassociates.com](http://www.dillmanassociates.com)