



HIGH PERFORMANCE CLIMB

LEADERSHIP ◆ **CULTURE** ◆ **TEAMWORK**

Thank you for selecting Scott Kartvedt and High Performance Climb, LLC (HPC) to be a part of your meeting. We look forward to delivering a program that will motivate and inspire your organization to deliver results!

We customize the program to your audience by studying your business, industry, people, market space, culture, and competition. Your assistance in helping educate us on the specifics will significantly enhance the program's value.

To save time, please complete this document to the best of your ability and return it to us before our coordination teleconference about 30 days before your program. If your meeting is for an "Association" rather than a single organization, answer the questions in the guide as it pertains to the members of your association.

We are looking forward to an outstanding program with you and your organization!

Sincerely-

Scott "Intake" Kartvedt

ADMINISTRATION:

CONFERENCE CALL PARTICIPANTS FROM YOUR ORGANIZATION:

NAME	TITLE	CONTACT #	E-MAIL
------	-------	-----------	--------

HOW SHOULD YOUR ORGANIZATION BE ADDRESSED FROM THE STAGE?

MEETING TITLE OR THEME:

NUMBER OF ATTENDEES:

AGE RANGE:

INTERNATIONAL AUDIENCE? YES NO

WHO IS THE AUDIENCE Example: District Managers and Sales Reps: These District Managers report to the 4 Regional Managers....

ARE THERE ANY SPECIFIC DIVISIONS / UNITS IN ATTENDANCE? Finance, Accounting, Operations, Machinists, Manufacturing:

HOTEL:

Name:

Address / Zip Code:

Telephone:

Confirmation #

MEETING LOCATION: If different than Hotel.

Name

Address with Zip Code

Telephone

SHIPPING LOCATION: In the event, we send materials to support the program.

NEAREST AIRPORT:

GROUND TRANSPORTATION: Will you provide transportation from the airport or should we arrange our own?

ON-SITE MEETING: WHO / WHERE / WHEN Usually the night before the program.

SCHEDULE OF EVENTS THE DAY OF OUR PROGRAM: If your group has been in meetings for longer than one hour, we kindly ask that you schedule a break for your organization before our presentation.

BREAK BEFORE THE KEYNOTE / PROGRAM?

TIME/ LENGTH OF KEYNOTE:

Start:

Finish:

WOULD YOU LIKE A QUESTION-AND-ANSWER SESSION AT THE END?

YES

NO

WHO WILL DO THE INTRODUCTION?

MEETING ROOM REQUIREMENTS: We will need a General Session room. What is the name of the general session room?

GENERAL SESSION MEETING INFORMATION

We request that the chairs in the General Session room be set “theatre style.” If you use round tables, please only seat participants on half of the stage facing the stage.

WHO WILL TAKE THE STAGE AT THE END OF THE PRESENTATION?

LOGO

We request a digital copy of your “logo” to customize the presentation.

VIDEO RECORDING: We do not allow clients to record our presentations. Taping or recording Scott Kartvedt's copyrighted material and intellectual property for use as a training tool or as a presentation to other employees as a substitute for purchasing any Scott Kartvedt product is strictly prohibited. It will be considered an infringement of Scott Kartvedt, Inc. copyright protected.

AV REQUIREMENTS:

Our speaker will bring one laptop to your program. We will run our presentation in Apple Keynote with embedded videos and graphics.

A minimum of one video projector (rear screen or forward imaging) compatible with Apple laptops to include all connection cables VGA or HDMI (preferred). A minimum of 3,000 lumens is requested.

Screen compatible with projector/room size

A wireless Lavalier microphone for each presenter and one wireless handheld microphone if you request Q&A.

Audio amplification / sound system interfaced with the computer and microphones. We will need 1/8-inch stereo mini-port audio adapters for the laptop.

Appropriate staging compatible with room and audience size (8' x 16' minimum)

PLEASE no podium

IF AVAILABLE

RGB / VGA Switcher to enable AV tech to switch from primary to back-up.

Confidence monitor (repeats image on the screen) placed on the floor in front of the stage for the Main Speaker to view during the presentation. 21-inch minimum.

Wireless cue light/clicker. If the AV Technician is located behind the stage (unable to be viewed by the Main Speaker), a separate, hard-wired backup system will be required.

AV TECHNICIAN: In addition to having the AV technician on hand during the program, we will also need the same technician (if possible) the afternoon/evening before the program for a thorough rehearsal (usually 5 pm or 6 pm) and a minimum of one or two hours before the program for a “final” check.

AV TECHNICIAN NAME AND CONTACT INFORMATION:

Name:

Phone:

MEETING TIME FOR AV REHEARSAL:

PROGRAM DEBRIEF

Please select a time within a week after the program for a conference call to debrief our performance during the Keynote and Team Building Program.

Date:

Time:

OPERATIONS:

HOW DID YOU HEAR ABOUT SCOTT KARTVEDT?

MAIN REASON YOU HIRED SCOTT KARTVEDT:

WHAT IS THE GOAL OF THE PROGRAM: Educate? Motivate? Celebrate?

WHAT IS THE DESIRED “TAKEAWAY” FROM THE PROGRAM? What should happen in the attendee’s minds as a result of the program? How should they feel as they leave, and what message will they take with them?

IN YOUR OWN WORDS, PLEASE EXPLAIN WHAT YOUR ORGANIZATION DOES:

ORGANIZATIONAL CHANGES: What positive or negative changes have affected your business in the past 12 months?

HOW DO YOUR PARTICIPANTS VIEW THESE CHANGES?

ORGANIZATIONAL CHART

If practical, please send an organizational chart depicting your corporate structure outlined in the previous “Participants Occupation / Job Description” section.

HOW HAS YOUR COMPETITION CHANGED? (Mergers, acquisitions, new products)
Please list specific company names with specific facts.

PLEASE NAME THREE COMPETITORS: Please include full names. Which of the competitors is your biggest and why?

WHAT ARE YOUR CORE COMPETENCIES? What are the organizational standards you expect your team members to uphold?

PLANNING - HIGH PERFORMANCE PROCESS

SIMPLICITY TO OVERCOME COMPLEXITY

9-LINE PLANNING:

- 1: Determine Leader and Vertical Planning Team (VPT)
 - 2: Develop the Objective (Strategic/Operational/Tactical) (Clear/Measurable/Achievable)
 - 3: Identify Organizational Resources
 - 4: Identify Organizational Threats (Internal/External/Controllable/Uncontrollable)
 - 5: Draw on Lessons Learned (Best practices/Recurring challenges)
 - 6: Strategic Alignment Validation (Brief higher authority for vector)
 - 7: Plan of Action and Milestones (POA&M) (Validates Objective)**
 - 8: Red Team the POA&M
 - 9: Contingencies
-

HOW WELL DOES YOUR ORGANIZATION PLAN? On a scale of 1 to 10:

1(poor), 5 (we all plan, but differently), 10 (use established organizational planning process).

HOW MUCH TRAINING TIME DOES YOUR L&D DEPARTMENT COMMIT TO PLANNING?

WHO TYPICALLY PLANS PROJECTS IN YOUR ORGANIZATION?

DO YOU USE A PLANNING SOFTWARE, IF SO, WHAT?

DEVELOP THE OBJECTIVE: Every organization sets goals; we categorize goals into three specific categories based on time horizon: Strategic (3-5 years), Operational (6 months to 3 years), and Tactical (today to 6 months). Please provide one of your tactical goals:

IDENTIFY ORGANIZATIONAL RESOURCES: What resources do you currently have in your organization to help you achieve the above-listed goal?

IDENTIFY ORGANIZATIONAL THREATS: What challenges do you foresee preventing you from achieving the above-listed goal?

DRAW ON LESSONS LEARNED: Based on previous experience, do you have any best practices to help you achieve the above goal? Are there any recurring errors or errors in the past within the organization that you do not want to duplicate in achieving the above goal?

(No answer required, simply defining the POA&M)

STRATEGIC ALIGNMENT VALIDATION

This is an opportunity to brief higher authority to ensure the planning is on track with the original vision/strategy.

DEVELOP POA&M (PLAN OF ACTION AND MILESTONES):

This is where the rubber meets the road...

We will develop a plan of action detailing a single point of accountability (1 person) responsible for each task required and we will list a specific date and time when we expect the task to be completed. We will also list milestones periodically throughout the plan which will help us determine if we are on the right course, on time and within budget.

(No answer required, simply defining the POA&M)

RED TEAM THE POA&M

This step is critical to find flaws in the plan and repair the “planning blindness” that occurs with all planners. It allows a group of subject matter experts who have not been part of the planning process to tactfully dismantle your plan, giving it a stronger foundation for market execution.

IDENTIFY REASONABLE CONTINGENCY PROACTIVE FIRST STEPS: What “catastrophic” macro problem could cause the goal to become unachievable?

Please list 3:

1:

2:

3:

BRIEFING & EXECUTION

HIGH PERFORMANCE PROCESS

– 9-LINE BRIEF

- 1: Who is involved in the execution
 - 2: Restate Objective
 - 3: Resources available
 - 4: Threats: (HIGH/MEDIUM/LOW)
 - 5: TOP 3 Lessons Learned / Goods and Others (what works WELL, what DOESN'T)
 - 6: How today's execution aligns with Strategy
 - 7: Who/What/When for execution
 - 8: Contingencies
 - 9: Questions
-

DOES YOUR ORGANIZATION HAVE A STANDARD BRIEF BEFORE ACTIONABLE EXECUTION?

HOW WELL DO YOU CONSISTENTLY EXECUTE A PRE-EXECUTION BRIEF?

Please rate your execution effectiveness from 1 (poor) to 10 (excellent)

HOW WELL DOES YOUR ORGANIZATION EXECUTE AND ACHIEVE THE PLANNED GOALS?

Please rate your execution effectiveness from 1 (poor) to 10 (excellent)

PLEASE LIST A FEW WAYS YOUR ORGANIZATION BECOMES OVERLOADED DURING THE WORK WEEK

Too many meetings, excessive emails, ineffective meetings...

MISSION CROSSCHECK TIME (MCT)

As combat pilots who fly off aircraft carriers, we execute and operate in a fast-paced, dynamic environment. We are always required to maintain vigilance and situational awareness of our surroundings. If we get too focused on one aspect of our operations, our safety margins plummet, and we put ourselves, and others, at unnecessary RISK. We mitigate this risk through MISSION CROSS-CHECK TIME (MCT). We understand our primary mission while simultaneously maintaining awareness of our secondary, tertiary, and other important tasks.

WHAT IS YOUR ORGANIZATION'S PRIMARY GOAL?

Sales, Revenue, Profit, Safety, Communication...

WHY IS THIS YOUR PRIMARY GOAL?

NAME 4 OTHER IMPORTANT GOALS YOUR ORGANIZATION DEEMS ALMOST AS IMPORTANT AS THE PRIMARY GOAL.

- 1.
- 2.
- 3.
- 4.

DEBRIEF - HIGH PERFORMANCE PROCESS

IMPROVE DEBRIEF SM

- 1: Individual Handshake Before and After
 - 2: Me, I, MY tone for accountability
 - 3: Positive Statement / Welcome new team members
 - 4: Review Execution vs. Objective
 - 5: Operational Analysis (Why did Execution differ from our plan? Cause/Root Cause)
 - 6: Verify Lessons Learned and Transfer
 - 7: End on a Positive note: Glad to be here!
-

DOES YOUR ORGANIZATION HAVE AN AFTER-ACTION REVIEW?

Score your debriefing effectiveness from 1 (poor) to 10 (excellent)

WHAT DO YOU CALL THE AAR MEETINGS AT YOUR ORGANIZATION?

HOW DOES YOUR ORGANIZATION TRANSFER BEST PRACTICES AND OVERCOME RECURRING ERRORS?

SAFETY

TEAM RESOURCE MANAGEMENT (TRM) and THREAT AND ERROR MANAGEMENT (TEM)

HOW DOES YOUR ORGANIZATION MANAGE RISK?

DO YOU HAVE A MODEL/PROCESS TO ENSURE SAFETY?



ARE YOU AWARE OF COGNITIVE BIASES IN THE WORKPLACE AND THEIR EFFECT ON SAFE OPERATIONS?

A cognitive bias refers to the systematic pattern of deviation from norm or rationality in judgment, whereby inferences about other people and situations may be illogical. Individuals create their own "subjective social reality" from their perception of the input. The tendency to acquire and process information by filtering it through one's likes, dislikes, and experiences. They are researched, proven, and powerful.

WHICH OF THE FOLLOWING BIASES ARE MOST PREVALENT IN YOUR ORGANIZATION? (circle each one that you believe has a negative effect on safety)

Plan Continuation: Tendency to follow the original plan, even when changing conditions require altering the plan. Strengthens as the end becomes closer.

Confirmation: People tend to listen more to information that confirms the beliefs they already have.

Overconfidence: Experience and expertise cause a tendency to overestimate abilities and take greater risks.

Expectation: Tendency to see what you expect to see rather than what is there.

Availability Heuristic: works by prioritizing infrequent events based on recency and vividness. For example, plane crashes can make people afraid of flying. However, the likelihood of dying in a car accident is far higher than dying as a passenger on an airplane.

Self-Serving Bias: People credit themselves for successes but blame failures on outside causes.

Attentional Bias: The tendency to pay attention to some things while ignoring others. This impacts the things we perceive in the environment and the decisions we make based on our perceptions.

Actor-Observer Bias: When it comes to our actions, we are often far too likely to attribute things to external influences. When explaining other people's actions, however, we are far more likely to attribute their behaviors to internal causes.

Functional Fixedness

Anchoring Bias: We also tend to be overly influenced by the first piece of information we hear, a phenomenon referred to as the anchoring bias or anchoring effect.

Misinformation Effect: Our memories of events also tend to be heavily influenced by things that happened after the event, a phenomenon known as the misinformation effect.

False Consensus Effect: This can lead people not only to incorrectly think that everyone else agrees with them but can sometimes lead them to overvalue their opinions.

Optimism Bias: We tend to be too optimistic for our good. We overestimate the likelihood that good things will happen to us while underestimating the probability that negative events will impact our lives.

Thank you for taking the time to read through this document. It will help us deliver a program that will exceed your expectations!

For questions about this document or your program, please call 757-639-0744