

# Foundations Level Workshops Content

6 modules of 2-hours duration to be taken in any sequence

## Client Journey



### The Job To Be Done: **Mastering the Client Journey from Onboarding to Impact**

- How to onboard clients for future success
- How to assess and triage clients
- How to define the scope of work
- How to ensure execution of agreements
- How to track and report impact to all stakeholders

## Client Empowerment



### Making Advice Work: **Empowering Clients to Take Ownership and Action**

- How to be a facilitator client's decision-making process
- How to ask questions which empower the clients
- How to present clients with options with infographics
- How to give clients the final ownership of the decisions
- How to make a bridge from decisions to actions

## Client Engagement



### Keep Them Coming Back: **Engaging Client Companies for The Long Haul**

- How to identify your client's true needs
- How to captivate client's minds with relevance, insights and practicality
- How to engage client's hearts with vision and identity
- How to change the game with rules, norms and habits

## Client Mindsets



### Your Mind at Work: **How Your Attitude Can Transform Your Client's Mindset**

- How to cultivate an open mind and positive outlook
- How to adopt a mindset to keep things simple
- How to cultivate an action-oriented attitude
- How to install resilience with clients
- How to demonstrate mindsets in practical ways

## Client Connection



### How to Be Likable: **Building Trust and Rapport with Any Client**

- How to listen through open-ended questions and interest
- How to show authenticity through personal anecdotes
- How to follow clients' leads and find common ground
- How to match verbal and nonverbal communication style
- How to provide feedback and acknowledge opinions

## Client Ethics



### Ethics and Beyond: **Making Ethics and Inclusion Part of Daily Practice**

- How to communicate ethical principles
- How to demonstrate dedication to inclusion and diversity
- How to handle common ethical dilemmas
- How do define professional standards and live by them