

Continuous Process Improvement Executive/Champion Leader Training

Request for Quote: FA301623U0085





Greetings

We are proud to introduce our Innovation Center. **The Breakthru Institute (TBI)** is designed to serve as your Conduit to reducing and/or eliminating roadblocks that occasionally arise in our clients' business, talent base, leadership (any level), or processes. Our training experiences focus on best practices, techniques. We also bring into your universe practical tools that are easy to implement in your organization.

Our Training Institute is a wholly owned subsidiary of CMA Enterprise Incorporated and is called The Breakthru Institute. It houses approximately six academies of which one of them is our Lean Six Sigma Academy. Descriptions of the Lean courses follow this correspondence. It is an expansion of our current 33 year old brand and it gives us the latitude to "Explore the Obvious" through Edu-tainment.

We are in the classroom... We are virtual... And We are here to coach you when you want independent study. Our TBI website is www.breakthruinstitute.biz

We look forward to your favorable response and if you have any questions, please contact the undersigned at 954-476-3525 or Oliver Williams at 786-286-0010.

Kindest regards,

A handwritten signature in red ink, appearing to read 'Gail P. Birks'.

Gail P. Birks, EMBA, LMBB, IATA
Managing Director
Mediator



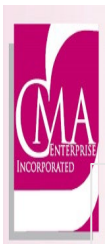
Track One: Training Schedule.

Day	Morning	Afternoon/Evening
Evening Reception		Ice breaker
Day 1 Exe. Leadership “The Readiness Factor”	<p><i>The Readiness Factor</i> 3.25 HRCI Credits</p> <ul style="list-style-type: none"> • Meet me where I am • DiSC Recap: Do Our Values Stand up? • Managing Expectations: What is critical to our Quality? 	<p><i>Building a Customer Centric Environment</i> 3.25 HRCI Credits</p> <ul style="list-style-type: none"> • Comparing Notes • Lessons to be Learned • Managing Clutter: The Hidden Messaging • Performance Depends on What you have to work with... • Maximizing the Customer Experience • Lessons to take forward • Next Steps
Day 2 – Lean Champion 13 HRCI Credits	<ul style="list-style-type: none"> • Lean Overview • Developing the Cornerstones • Managing the Blind side • Force Field Analysis • Expectation Tree • Managing the Business Renewal Process • Balanced Scorecard • 5 Whys • Target Means Matrix 	<ul style="list-style-type: none"> • Vetting Your Team • The Executive Summary • Defining the Project • Establishing Project Goals • Cost Benefits • Project Constraints • Conducting a Corporate Diagnosis • Key Factor Matrix • Organization Prod./Svc. Matrix • 5 Levels of Organization Learning
Day 3 - Lean Champion	<ul style="list-style-type: none"> • Recapping Day 2 • Creating Your System by Mapping Your Process • Brainstorming Solutions 	<ul style="list-style-type: none"> • FMEA (Assessing Risk) • Deployment Strategies <ul style="list-style-type: none"> • Setting the Action Plan • Selecting the Right Project Mgr. and Team • Monitoring Performance and Milestones (Lessons Learned) • Revisiting Our Current State • Impact Assessment



Track Two: Extended Training Schedule.

Day		
Evening Reception		Ice breaker
Leaders Guiding Leaders For Sustainable Success	<i>3.25 HRCI Credits for each module</i> <i>Six (6) modules, four hours each</i>	<ul style="list-style-type: none"> • The Readiness Factor • Communication strategies: Managing Conflict • Communication Strategies Building Trust • Performance Metrics: Time and Resource Management • Building a Customer Centric Climate
Managing the Oversight of Continuing Process Improvement (CPI)	<ul style="list-style-type: none"> • A3 General Improvement – 23.5 HRCI Credits <ul style="list-style-type: none"> • 9-10 Sessions • 8D Risk Management Assessment – 31.5 Credits <ul style="list-style-type: none"> • 10-12 Sessions 	<p>The <u>Workplace Kaizen Excursions</u> focuses on the process of observing and understanding the current workplace conditions from an administrative view. It employs Lean Improvement tools and Subject Matter Expert teams that design the blueprint for Lean Workplace Sustainability. The bottom line is once we know where we are, then we can build for where we desire to go.</p> <p>Run your own projects with the tools that will assist you in mobilizing project teams, project management, handoff and monitoring for sustainable integration</p>



Other Recommended Topics



CMA can customize your CPI/Leadership journey and the following are recommended topics for your excursion.

Category	Course listing
Strategic Thinking	<ul style="list-style-type: none"> • Goin' Fishin': a Systemic Approach to Problem Solving and Decision Making • Lean Business Leader • Lean Champion • Lean Project Management • Lean Practitioner (Leading CPI Initiatives)
Psychological Safety in the Workplace	<ul style="list-style-type: none"> • The Readiness Factor (DiSC Supplement)
Confidence and Assertive Leadership	<ul style="list-style-type: none"> • Negotiation and Influencing Skills • Presentation Skills • Finding Our Voice – Women in Leadership
Team Building	<ul style="list-style-type: none"> • Lean Champion • Lean Project Management: Leading Teams with a Purpose • DiSC Team Dimensions
Professional and Leadership Development	<ul style="list-style-type: none"> • Leaders Guiding Leaders for Sustainable Success • Peer today... Leading Tomorrow • Being Customer-centric • DiSC Work of Leaders
Conflict Management Conflict Resolution	<ul style="list-style-type: none"> • Mediation Skills • DiSC Productive Conflict • Resolving Conflict • Handling Difficult Customers/Situations
Change Management	<ul style="list-style-type: none"> • Root Cause Analysis • CMMI: Maturity Models for Sustainable Success • Strategic Planning for 'Best Fit' Alignment • Eight (8) Elements of Waste and Fail Point Analysis • (DiSC) Time Management
Communication and Interpersonal Skills	<ul style="list-style-type: none"> • Creating an Effective Communication Plan • Presentation Skills • Stress Management
Emotional Intelligence Tools	<ul style="list-style-type: none"> • DiSC Personal Assessment



Our Training Format

The CMA Team designs its Training Excursions with you in mind.

Our sessions and training series are highly interactive and include Simulation Case Studies that build your capacity as a Practitioner in CPI.

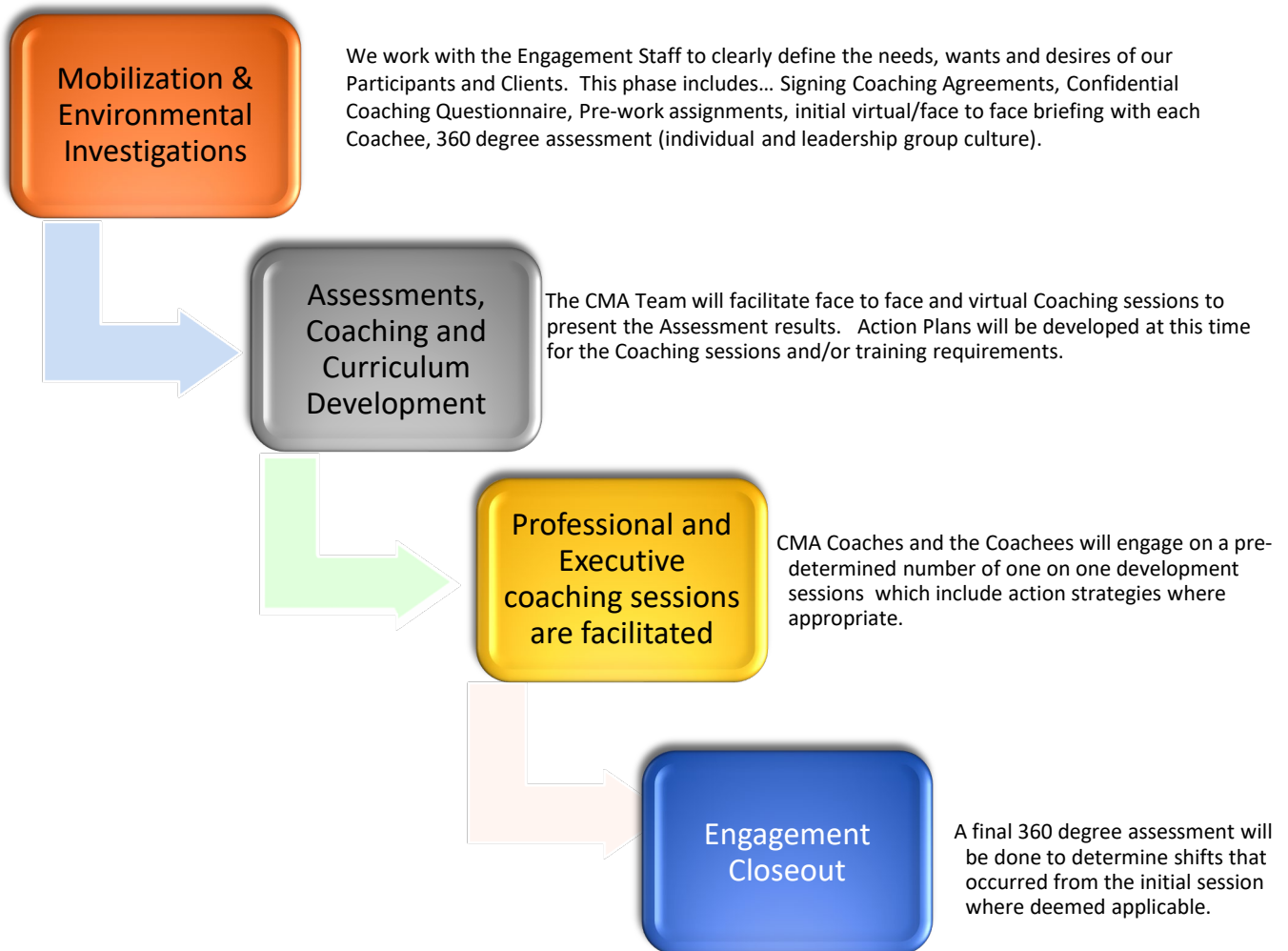
Other details include...

- Short Lecture
- Large Group Discussions
- Breakout Activities
- Report out sessions
- Pre- and Post Session assignments



CMA Coaching Program Overview

Based on our understanding of the scope of work requested, the diagram below reflects our process for course management



Coaching engagements are quoted based on the position of the coaching candidate and extensiveness of the work required. The fee is fixed and includes all materials, preparation, coaching sessions and debriefs.

The DiSC Assessment (Individual and Group Culture) will assist in laying the ground work for the second half of the Excursion. Understand how the Group of Leaders Guides their teams is essential to the success of all initiatives lead.

The summary below shares the components that are evaluated in the first step of the “Readiness Factor.”

Work of Leaders: Vision, Alignment, and Execution

Work of Leaders provides a simple, three-step process to help you reflect on how you approach the most fundamental work of leaders: Creating a Vision, building Alignment around that vision, and championing Execution of the vision.



VISION

The work of leaders includes crafting a vision of new possibilities for the future through exploration, boldness, and testing assumptions.



ALIGNMENT

Leaders build alignment by communicating with clarity, engaging in dialogue, and providing inspiration, so everyone is moving in the same direction.



EXECUTION

Finally, leaders need to champion execution through momentum, structure, and feedback, to enable the group to capitalize on its talents while making the vision a reality.



Classroom vs Online/Blended Learning Formats



Our highly interactive sessions are available in classroom, self-directed and online webinar blended format.

This proposed engagement will focus on Blended and Self-Directed Platforms.

Features available to Kent State are summarized below.

	<u>Blended</u>	<u>Classroom</u>	<u>Online (Self Directed)</u>
Facilitator	yes	yes	No (self directed)
Materials	Yes Downloaded	yes Downloadable or hard copy	Yes downloaded
Quizzes/ activities	Yes	Yes	Yes
Videos (If applicable)	Yes	Yes	Yes
Small/large group discussions	Yes	Yes	No
Preferred Class Size	15-25	15-25	unlimited



Lead Coach/Consultant



Gail Birks, EMBA, LMBB

Gail Birks is the founding Principal with CMA Enterprise Incorporated. Professionally, Ms. Birks has served the South Florida Business community for nearly nine years as a Middle Market Assistant Vice President with Southeast Bank, NA and SunTrust/Miami, NA respectively. She holds a Bachelor Degree in Economics and Finance from Tennessee State University in Nashville, Tennessee where she was also enrolled in the University's Honors Program. She is a graduate of the Executive MBA Program at Florida International University and has completed post-graduate work in the area of Industrial Psychology and Personnel Staffing and Administration. She was also voted "Best Presenter" by her 1999 graduating class.

Ms. Birks is also a Certified Mediator and Arbitrator for the Florida State Supreme Court. Her Certifications encompass Circuit/Civil, County and Residential Mortgage Foreclosure. She has extensive experience in mediating conflicts in the workplace, customer service grievances, contract disputes, insurance claims, employee relations (and supervisor/employee matters.).

Ms. Birks has served as an **Independent Corporate Director since 1994**. During her tenure as Chairperson of the CRA Committee, the Bank has received numerous Community Awards and recommendations of "Outstanding" and "High Satisfactory" ratings from regulatory agencies (OTS and OCC).

She has been a part of the governing body of a financial institution that began as a privately held organization before merging in 2005 with a publically traded financial holding company and repurchased by private investors in 2009. Ms. Birks also has over 30 years of experience in board leadership and an expertise in board development and governance having served on and consulted numerous non-profit and civic boards in South Florida. In 2012, Ms. Birks received an invitation from the NYSE to attend a conference of Diverse Independent Corporate Board of Directors in NYC

And in June, 2013, she was a featured panelist for a workshop on "Enterprise Risk Management. A Director's Perspective" and the American Leader's Conference. Ms. Birks was also named as a "Director to Watch in 2014" by **Directors and Boards Magazine** (September Issue).

Ms. Birks, a published author of four books, holds an advanced ***Certification in Lean Six Sigma***. She is a ***Lean Master Black Belt through her matriculation at Florida Atlantic University*** (September, 2013). Her other professional certifications include but are not limited to the following: Certified Total Quality Management Training, Certified Self-Directed Workgroup Training, Advanced Sales Training and Management Credit Training. In 2006 Ms. Birks was selected to be a Protégée with Accenture, LLC at the national level in their Inaugural Mentor/Protégée Program.

Her consulting and business concepts have been featured in numerous cover stories in the Miami Herald and other South Florida Circulars. She has raised the awareness of grassroots and corporate clients through her consulting and training exercises, resulting in heightened awareness in the areas of organization and cultural diversity, self-directed workgroups and high performance teams, and process improvement. She has designed and facilitated sessions as well as consulted on a local, regional and national levels for public, corporate and nonprofit organizations.

Ms. Birks' honors include: 2012 Top 100 Most Influential Black Professionals in South Florida – ICABA; Top 50 Most Powerful Black Professionals in South Florida -2011; Alpha Kappa Alpha Sorority, Inc., Top Hat Award in Business and Entrepreneurship - 2008; Greater Fort Lauderdale Chamber of Commerce Women's Council of Commerce Circle of Excellence Award in Business – 2007; "In The Company of Women", Miami Dade County – 2001; National Association of Business and Professional Women Business Champion – 2001; FIU- Executive MBA Class of 1999, "Best Presenter"; JM Family Enterprises African American Achiever

Published Podcasts and Articles

[She Talkx | CMA Enterprise Inc. \(cma-ent.com\)](http://cma-ent.com)

[Ladies Who Lean | CMA Enterprise Inc. \(cma-ent.com\)](http://cma-ent.com)

[CMA Chats | CMA Enterprise Incorporated | United States \(cma-ent.com\)](http://cma-ent.com)



“We are the Organizers of Your Business Puzzle”

~ *Gail P. Birks, President*



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