

27 May 2021

Proposal: Proposal and Content for *VisionBound Virtual Leadership Institute*

From: Kevin R. Miller, President VisionBound International LLC

1. The Compelling Need: Few things are as important today as the need for visionary, inspiring and motivating leaders, and this is essential in every business or human endeavor. The need is only greater as we face a pandemic-driven and changing future. Those companies and teams who thrive in the future will be those who are led, not merely managed. With the ever-changing business and world environment, this is becoming even more important.
2. A Solution: Our team, led by Kevin R. Miller, presents up to a 12-session *VisionBound Virtual Leadership Institute* for up to thirty managers, recommended to be held one hour each week. The program will be offered via Microsoft Teams, ZOOM or another selected medium. Sessions will be recorded for later viewing by those who miss or want to review. This program will develop current and future leaders with over a dozen key skills, ranging from interviewing and hiring, to building great teams, leading powerful meetings, coaching, and resolving individual and team conflict.

Kevin has had extensive experience working with business, healthcare, education and government teams in the United States, Asia and Europe for thirty years. We also can involve other experts, including those from your company.

3. The Design: This *Virtual Leadership Institute* can take place over a three month period or twice a week for six weeks. About ten topics will be presented, typically one hour each week. Individuals can register and participate from their own computers, mobile phones or digital devices, or can gather in small groups to learn together. Everyone will be able to chat and interact with the presenters and each other. Materials will be printed and distributed locally into binders provided by the unit. Some recent participant comments are shown at TAB B. Also, a brief video about the program can be viewed online at <https://vimeo.com/453996864>

The outline presented in this document is only one possible design but the content and number of sessions can be customized.

Continuing Education Credits can be awarded for attending at least 80% of the sessions and completing the course assignments. I can provide you with the information to get this course certified for these credits.

Learning Experiences:

1. Bring a network of leaders and prospective leaders together for collaborative learning and networking in a web-based environment. Present powerful learning on a wide variety of subjects pertinent to leader/manager development.
2. Each person will have an accountability/learning partner through the program and will hopefully meet with this person at least monthly in person or by web-meeting.
3. Participants will use the learning from the class to create their own *Individual Leadership Development Plans*.
4. Teams or companies can also conduct a Helm/Culture Survey to have aggregate data on their company or team. See www.surveymonkey.com/r/helmsurvey
5. I recommend the main textbook for the course will be *The Leadership Challenge* (sixth edition) by Kouzes and Posner, with its accompanying project workbook. Available through Amazon or other resellers.
6. Participants can choose to also apply their learning to solve a significant issue in their organization through a project and present their results to the rest of the class.
7. Attendees will be encouraged to read one additional book each month from a list of suggested books and share what they have learned in chat sessions in each session and with their accountability partner.
8. An on-line blog/learning community will allow participants to share ideas, best practices, ask questions and get advice from the instructors and each other.
9. Personal, one-on-one or one-on-group coaching with Kevin R. Miller can also be arranged separately.
10. Individuals may also participate in a personal 360-degree leadership profile, *The Strength-Based Leader* which provides personal, private feedback from self, peers, manager and others. This is provided and priced separately.

Main Learning Outcomes: Participants will:

1. Understand the power and importance of powerful leadership and how leadership differs greatly from management. (It is certainly possible to manage a business, office or team and never really lead it!)
2. Create and articulate a “North Star” of vision, mission, values and measures of success for the team.
3. Understand the difference between strategic, operational and tactical leadership and how to think in each of these three areas.
4. Analyze the current strengths and challenges of their team or company through the Helm Survey: www.surveymonkey.com/r/helmsurvey. This survey will be administered two weeks prior to the course start date.
5. How to motivate others through performance discussions. We will provide a model for performance and development planning, including the forms for doing this.
6. How to delegate effectively using the six steps of delegation.
7. Use the deck of *LeaderTip Cards* which I will ship to HIS groups to create an action plan.
8. How to lead effective, focused meetings.

9. How to resolve interpersonal and team conflict.
10. How to manage personal time as a senior leader (Care and Feeding of Monkeys).
11. Create a personal *Individual Leadership Development Plan* based on what they learn in class.
12. How to manage stress in themselves and recognize and mitigate organizational stress by having more fun and healthy activities at work.

Logistics and Pricing:

1. Pricing depends somewhat on the final design, whether books are included, and number of participants. Past projects have been priced at about \$495 per person for a class of 20-30. This equates to around fifty dollars per person per hour for excellent content and instruction. Also, for companies in Utah, the Utah State Custom Fit program may be able to fund 40% of this for non-government/for-profit teams in Utah and there may be other such programs in other states.
2. The course will be held primarily in a web-based Microsoft Teams group to allow for interaction, follow-up and discussions. Other platforms can also be used.
3. Sessions will involve behavior-based applications each week.
4. Materials will be available for online download and printing. Or can be shipped from us. Also, decks of LeaderTip Leadership Hot Tip Cards which will be provided.
5. A robust system of follow-ups and accountability can be added through the Tyfoom system: see www.tyfoom.com. Participants can make, track and report their commitments and actions, receive text reminders, view videos, and managers can easily see how their team and its individuals are performing. This is an extra monthly cost but is well worth it for the results it offers.
6. In 2021 we will be releasing a state-of-the-art Learning Management System that will provide easy access to recorded and live programs, a vast digital library and personal coaches.

Further details are provided in the following sections:

The VisionBound Virtual Leadership Institute

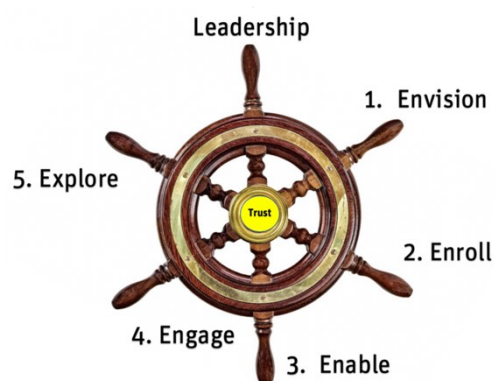
Developing Inspiring Leadership

Dr. Peter F. Drucker said, *“Only three things happen naturally in organizations: friction, confusion and underperformance. Everything else requires leadership.”* Great leadership releases the full potential of everyone in the team which then spreads out to increased performance in the entire team.

Basic Program Design: The content will be organized around VisionBound’s *Taking the Helm Model* shown to the right. Great leadership requires action, not position. Your team or company needs your steady, but caring, hand on the helm, to guide it towards the future and create a positive, productive culture.

TRUST forms the axis: without high trust, things slow down and cost more. And high trust not just in people but in systems. Next, **Envision**: create a powerful, guiding vision, mission, values and measures of success and involve everyone in the creation process. Next, a vision is of little value until everyone from the top down is mentally, emotionally, spiritually and physically **Enrolled** in it. But enrollment is not enough, we must **Enable** them with the time, material, training, money and resources to carry out their roles and vision. We continue by **Engaging** them through motivation, delegation and constant involvement. Finally, we involve everyone in the process to **Explore** new horizons: better and different ways to think and do things. Yet, your “ship” will face challenges: the high and turbulent seas of change!

Leaders, Take the Helm!



The program will address selections from the following list of leadership competencies.

Leadership Competency List

This is a list of competencies leaders need to master throughout their careers.

- Inspires Trust
- Inspires a Shared Vision
- Leads Effective Meetings
- Motivates Others
- Understands and Leverages Diversity
- Interviews and Hires Top Talent
- Delegates and Empowers
- Develops Others
- Holds Performance Conversations
- Sets Performance Goals
- Provides Clear Feedback
- Coaches and Mentors
- Prioritizes Team Goals/Workload
- Holds Others Accountable
- Manages Conflict
- Manages Team Time

- Builds Service Teams Leads Change
- Solves Problems
- Translates Strategy into Individual Performance
- Manages Stress in Self and Others
- Builds Teams
- Creates Win-win Performance Agreements
- Creates Team/Individual Scoreboards/Dashboards
- Thinks Creatively

- Creates and Communicates Vision
- Makes Quality Decisions
- Creates a Positive Organization Culture
- Leading System and Organizational Change
- Create a Learning Organization
- Prioritizes Individual Goals & Workload
- Political Savvy and External Awareness
- Gives Oral Presentations
- Writes Effectively: Masters Business Writing Skills

Senior/Executive Competencies

- Thinks Strategically and Creates Strategic Plans

Proposed 12 Session Virtual Institute Syllabus

This provides the suggested agenda of twelve sixty to 90-minute virtual webinar sessions. It is fully customizable and can be shaped in many other ways. The course will be largely designed around the five elements of the *Taking the Helm Model*: Leaders need to *Envision, Enroll, Enable, Engage and Explore*. Other topics can be substituted from the list on TAB A, following.



Session	Topic	Activities
1 (Envision)	Understanding Leadership Taking the Helm: The 5 E's: <i>Envisioning, Enrolling, Enabling, Engaging and Exploring</i>	Understand strategic, operational and tactical leadership. Start using the LeaderTip cards and create an ILDP
2 (Envision)	Creating a Unit or team Purpose/vision/values and Strategic Planning	Create or refine unit or team strategic plan; Writing a credo and team purpose statements Understand how to think and plan strategically
3 (Enroll)	Execution: How to create WIG's, scoreboards and a culture of accountability; Aligning Systems to Vision	Create Goals, accountability and scoreboards How to translate strategy into execution
4 (Enroll)	Interviewing and Hiring top talent	Learn the skills of effective interviewing. Practice a mock interview
5 (Enable)	Motivating and Empowering Others	Unleash talent through effective motivation; understand motivational theory; use the 200 Talents system
6 (Enable)	Delegating	Six steps to delegating. Practice delegating
7. (Engage)	Leading Effective Meetings	How to lead effective, efficient meetings
8 (Engage)	Holding Difficult Conversations: Creating a Culture of Shared Accountability	How to have accountability systems and discussions to "close the gap" between individual and team expectations and their performance
9 (Engage)	Resolving Conflict	Resolving conflict model; your communication style
10 (Engage)	Managing Personal and Team Stress	Practice eight steps of reducing stress
11 (Explore)	Creative Problem Solving	Learn the steps for identifying and solving root issue problems
12 (Explore)	Leading Change	Learn the eight steps for leading change from the Kotter model, and the eight things that de-rail change.

TAB A: Leadership Topics and Modules

Below are listed some of the modules that can be covered in the Institute. The exact mix can be adjusted depending on the needs and interests of the group.

To be effective long-term leaders and individual performers, we must be able to first and always lead ourselves, then lead others, next lead teams and finally lead organizations.

Leading Self

The skills needed by all people to be successful. These refer to the personal skills needed to lead effective, meaningful lives and be role models to others. These skills are appropriate for all staff.

1. Managing Stress in Yourself and Others
2. Managing Time
3. Creative Thinking and Problem Solving
4. The Strength-Based Leader 360-degree Profile feedback program with personal coaching

Leading Others

The skills needed for one-on-one influence and leadership. These are the skills needed to influence others and many are pertinent to all employees, not just those in management positions. They are also crucial skills to prepare “next-generation” leaders for promotion.

5. Understanding Leadership
6. Interviewing and Hiring Top Talent
7. Understanding and Leveraging Inclusion and Diversity
8. Delegating
9. Motivating and Empowering Others
10. Working and Dealing with Difficult People/Personalities
11. Resolving Interpersonal Conflict
12. Managing Individual Performance
13. Coaching, Mentoring and Counseling

Leading Teams

The skills needed to lead and work with teams of 3 or more. Ideal for all leaders who work in collaborative teams.

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13. Building Effective Teams

14. Leading Effective Meetings
15. Goal Setting and Action Planning (Team)
16. Creative Problem Solving (Team)
17. Leading Change in your Team
18. Cross-gender Communication: men and women working in teams
19. Leading Across Generations: motivating the four generations
20. Creating Team Mission/Vision
21. Giving Effective Feedback

Leading Organizations

The skills needed for higher level organizational leadership. Most are around a half day in length or are noted otherwise

Title

22. Strategic Thinking
23. Leading Organizational Change
24. Strategic Planning: Turning Plans into Action
25. Creating Organizational Vision/Mission Statements
26. Building A Corporate Culture

Serving All

The end purpose of all organizations is to provide service in some form, and a main purpose of leadership is to make that happen better. These customer service and sales/marketing modules build these skills

Title

27. Delivering World-class Customer Service
28. Serving Difficult Customers
29. Building and Leading a Service Team

TAB B:

Here are some testimonials I just received for the program I taught to 30 Army civilian leaders in Germany in the Fall of 2020:

Visionbound International, led by Mr. Kevin Miller, recently provided an outstanding 12-week Virtual Leadership Institute Seminar to 30 employees in our organization. Kevin's understanding of leadership and his ability to clearly articulate his approach to employees of differing skill levels and experience was remarkable. Kevin's takes the seminar participants through a new topic each week that includes topics such as defining leadership and its importance; and explaining how to create a vision, resolve conflict, and lead change within an organization. The seminar effectively uses small group discussions outside of "class" to develop and implement "Monday Morning Plans" focused on the participants holding each other accountable for turning the leadership principles they are learning into action. The materials provided throughout the course markedly improved the learning experience and also serve as invaluable resources for employees as they continue to grow and strengthen their leadership skills. I am confident that Kevin's seminar has given our employees a solid foundation for improving their leadership and effectiveness.

Rick L. Tillotson
21st Theater Sustainment Command
Civilian Deputy

I had the recent pleasure of participating in VisionBound's Virtual Leadership Institute. I found the entire experience enlightening and engaging. What impressed me the most was Kevin's Helm leadership model, which is the simplest and best leadership model I have ever seen, considering that I helped coordinate the curriculum for the Executive Leadership Development Program (ELDP) for three years for the Office of the Secretary of Defense, based upon the DoD Civilian Leader Development Continuum and DoD Civilian Leader Development Framework.

I was also impressed that he taught best practices for each leadership competency that he taught and provided guidelines and job-aids so that participants could implement the competencies immediately. Kevin challenged the learners in each session to apply the tools, interact with an accountability partner, and report in a running After Action Review what they learned and applied each week. One of the favorite tools was the deck of 38 LeaderTip cards: participants chose cards to focus on each week and scoreboard their usage.

At the beginning of each session, Kevin had a few participants share how they had been applying the workshop principles and competencies, the behaviors from the LeaderTip cards, as well as the principles and practices from the assigned book, *The Leadership Challenge*. In spite of having only an hour for each of the 10 sessions, Kevin provided some time for participants to discuss and practice the competencies, and plan how they would apply them.

I have studied, researched, implemented, and taught best-practice instructional principles and strategies for most of my career, and have a Ph.D. in instructional design. Rarely have I seen the principles applied so effectively to leadership training. This course is unusually powerful and extremely impactful for anyone who wants to accelerate their skill and success as an inspiring leader.

Dr. Max Cropper
CEO and President
Five Star Performance Solutions

I have been working over 35 years for the government encompassing both 22 years in the Army and 13 years civil service with an educational background of a Master's degrees in Management, Human Resources, and Education. VisionBound's virtual leadership institute provided a fresh approach to leadership training, new material gained, and a reminder to follow my heart.

Our Army command recognized a potential leadership issue and decided to give VisionBound an opportunity by providing us a 12-week small group leadership facilitation course with a delivery method through Microsoft Teams. Kevin Miller "knocked it out the park" by providing a weekly one hour plus interactive seminar with the students, weekly reading assignment and exercises, weekly accountable after-action reviews with a learning journey, 37 different VisionBound Leader Tip cards with challenge events impacting the organization, various surveys, personal stories relating his leadership experience, and more importantly a leadership binder full of references to refer to after the course has been completed.

This program, led by Kevin R. Miller, accelerated our understanding of effective leadership performing our daily mission to the warfighters within the European area of responsibility. I highly recommend VisionBound International, particularly to both civilian and military organizations looking to develop, coach, and mentor their personnel at the junior level of leadership. If you are an organization struggling with leadership issues, contact VisionBound today!

John F. Farias
Senior Defense Travel Administrator
21st Theater Sustainment Command, Kaiserslautern, Germany

Kevin compellingly and carefully describes the critical role leadership plays in any organization. Over 12 weeks, Kevin masterfully navigated the virtual environment and engaged me through a series of insightful and thought-provoking lessons and exercises. Our work with accountability partners successfully helped me turn leadership into tangible action that

produced superior results. The most important anecdote to me is the last thing the authors of The Leadership Challenge tell us “Leadership is not an affair of the head. Leadership is an affair of the heart”.

Bill Huggins, 21st Theater Sustainment Command, Kaiserslautern, Germany

The Vision Bound Leadership Challenge course led by Kevin R. Miller is a very inspirational, condensed 12-week course with powerful tactics on how to steer organizations in the right direction. My take-a-way from this course is that of “do unto others as you would have others do unto you.” It’s basically geared towards treating everyone as equally capable of leadership in the absence of leadership. Empower employees, reward work on a daily basis even if the task is not one of a strategic nature. Get to know your organization and those who run the organization. Break bread, step outside of your office to see how others keep the daily tasks on-going. There are numerous advantages and lessons taught in a short amount of time. I could go on and on about the benefits of the course and I would recommend this to any institution as the rewards are tremendous both to leaders and employees. I am honored to have had the opportunity to participate in this course.

Darrell W. Fair, Plans and Operations Specialist
21st Theater Sustainment Command Human Resources Sustainment Center



Kevin R. Miller, MEd., MS

President, VisionBound International

Dr. Stephen R. Covey said of Kevin, "A *unique combination of character, competence and enthusiasm has made Kevin an extraordinary consultant and teacher.*"

Clients world-wide value Kevin's "real-world" experience. For over 25 years he has developed leadership and customer loyalty and transformed cultures in both public and private sectors. As a former Army officer, he observed first-hand the power of leadership as a "force multiplier" and understands the need for strong leaders in today's world. He is committed to use best practices and practical tools to help others make the genuine changes necessary to become great leaders. His company uses a three-lane approach: **Win Loyal Customers, Provide Inspiring Leaders and Build Winning Teams.**

Kevin brings a wealth of experience to his clients. He is a retired active-duty Army officer. He served as a company commander in the 7th Infantry Division, served during Desert Storm, and held many leadership positions in Europe and the United States.

In addition to his military service, in 1995 Kevin founded his own consulting company, VisionBound International, LLC, and has worked with public and private-sector clients worldwide helping them improve leadership, communication, and customer service skills. The VisionBound Leadership Institute has developed hundreds of leaders in the United States and internationally. Kevin co-authored "*Customer Service Strategies that Really Work*" with other experts and is considered an international expert on customer service. He recently released his book *Customers Only Want Two Things: Winning Loyalty in a Competitive World*, and co-authored *Entrepreneurs on Fire* with best-selling author Timothy Ferris and also *Customer Service Strategies that Really Work*.

Kevin's clients represent a broad, cross-section of industries including government, military, education, finance, healthcare, aerospace, oil and gas, automotive, and retail and technology, enabling him to cross-level concepts, tools, stories and skills with each group. Kevin is also a highly popular keynote presenter in conferences and workshops, and on several cruise lines where he travels the world. He also leads team leadership events on cruises.

Kevin has earned three M.S. degrees—one from Utah State University in secondary education, a second from Kansas State University in adult and continuing education, and a third from the Command and General Staff College in strategy and operations. He holds a B.S. in business management from Brigham Young University.

Kevin and his wife, Denise, live in Springville, Utah. Together they like to travel and garden and enjoy their four children and (especially) their six grandchildren! He is active in various community activities.

Programs Include:

- Leadership Development
- Customer Loyalty Programs
- Team-building
- Communication Workshops
- Surveys and Assessments
- Strategic Planning
- Goal Setting, Execution and Scoreboarding
- Creating a Culture of Accountability
- Stress Management
- Time Management
- Webinars
- Inspiring Keynotes
- Breakout Sessions
- Executive Coaching
- *Crucial Conversations™*
- *Crucial Accountability™*
- *7 Habits of Highly Effective People™*
- Webinars

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