

CERTAINTY INNOVATION DAY

Thursday 17th March 2022

**IMPLEMENTATION
SESSION OBJECTIVES & QUESTIONS**

IMPLEMENTATION

SIGNIFICANT LEARNING & DEVELOPMENT OBJECTIVES***:

Participating in this session aims to maximise the probability that participants will...

Kinds of Learning

LEARNING OBJECTIVES

Foundational knowledge

(limited to what is considered really important to retain)

The importance of commitment to plan

Application

(what is it we want participants to be able to do six months on?)

Progress will have been achieved with some of the commitments from this event

Integration

(what connections will participants make with other areas of their professional lives?)

Increase connection with accountability support to enable and support the on-going planning process.

Human Dimension

(what have participants learned about themselves or how they interact with others?)

Understand the power, potential and paths of personal and advisory team growth

Caring

(demonstrating an increased appreciation for the subject matter)

Greater appreciation and ability to relate to the paths advisory clients undertake

Learning How to Learn

(becoming a self-directed learner)

Read, review and research more on the subject of the role of Principle Adviser- Linchpins

IMPLEMENTATION

INDIVIDUAL ACCOUNTABILITY DISCUSSIONS

- Your biggest breakthrough to achieve? (i.e. it can't be done without a mixture of personal courage, new skills, specific support and accountability)
- Your biggest lesson?
- Your biggest implementation challenge?
- How will you measure progress in three months? Twelve months?
- Anything else?



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TEAM ACCOUNTABILITY DISCUSSIONS

- The team's biggest breakthrough to achieve? (i.e. it can't be done without a mixture of personal courage, new skills, specific support and accountability)
- The team's biggest lesson?
- The team's biggest implementation challenge?
- How will the team measure progress in three months? Twelve months?
- Specific team commitments – by who? By when?
- Anything else?



ADDITIONAL SUPPORT MATERIALS

- Adizes, Ichak. *Corporate Lifecycles: How and Why Corporations Grow and Die and What to do About It*. New Jersey: Prentice-Hall, 1988
- Adizes, Ichak. *Managing Corporate Lifecycles*. New Jersey: Prentice Hall Press
- Collins, Jim. *Good to Great*. London: Random House, 2001
- Collins, Jim & Hansen, Morten. *Great by Choice*. London: Random House, 2011
- Edelman, Sarah. *Change Your Thinking*. Sydney: ABC Books, 2001
- Egan, Gerard. *The Skilled Helper*. Belmont CA USA: Brooks/Cole Publishing Company, 1994
- Godin, Seth. *Linchpin*. Piatkus, 2010
- Harnish, Verve. *Mastering the Rockefeller Habits*. New York: SelectBooks Inc, 2006
- Johnson, Spencer. *Who Moved My Cheese*. London: Vermilion, 1998
- Kay, John. *Other People's Money*. London: Profile Books, 2015
- LeFever, Lee. *The Art of Explanation*. John Wiley & Sons, 2013
- Leonard, George. *Mastery*. New York: Penguin Group, 1991
- Levin, Ross. *The Wealth Management Index*. London: Irwin Professional Publishing, 1997
- Maister, David. *Managing The Professional Service Firm*. New York: The Free Press, 1993
- Maister, David. *The Trusted Adviser*. New York: Touchstone, 2000
- Maslow, Abraham H. *Toward a Psychology of Being*. New York: John Wiley & Sons, 1968
- Nagel, Hogan, Zale. *The Strategy and Tactics of Pricing*. New Jersey, Prentice Hall, 2011 (*Fifth Edition*)
- Patterson, Grenny, McMillan, Switzler. *Crucial Conversations*. McGraw Hill, 2012
- Patterson, Grenny, McMillan, Switzler. *Crucial Accountability*. McGraw Hill, 2013
- Rogers, Everett. *Diffusion of Innovations*. New York: Free Press, 1995
- Sinek, Simon. *Start With Why* Penguin Books, 2009
- Tibergien, Mark & Dahl, Owen. *How to Value, Buy or Sell a Financial Advisory Practice*. New York: Bloomberg Press, 2006
- Veres, Bob. *The Cutting Edge in Financial Services*. Cincinnati: The National Underwriter Company, 2003