



MONTHLY PROGRAM GUIDE

Month #1

January 2020

Primary Focus

Month #1 will focus on: (1) understanding your ‘wiring,’ and how to use that information to enhance your career, improve team performance, and to become a more effective leader; (2) understanding leadership transitions and pre- and post-transaction aspects of a sale, transition, merger, or acquisition of business interests.

Schedule

01/07	@ 5p	<i>Orientation Member Mixer (IP)</i>	01/28	@ 9a	<i>Mastermind (V)</i>
01/09	@ 8a	<i>Workshop & Strategy Briefing (IP)</i>	01/30		<i>Member Research Poll</i>
01/10-24		<i>Quest Learning Experience</i>	01/30		<i>Member Survey</i>
01/13-24		<i>Coaching Sessions (V)</i>			

WORKSHOP

Title

Understanding People: *The Key to Unlocking Your Success in Life and Business*

Objective

To understand your ‘wiring,’ and how to use that information to enhance your career, improve team performance, and to become a more effective leader using a variety of assessment tools. Also, to gain a deeper understanding of how to successfully utilize and transition family wealth.

Presenters

David Kolbe	<i>Kolbe Corp.</i> CEO
Hugh Massie	<i>DNA Behavior</i> CEO

Prerequisite

Review Presenter Bios
 View Topic Overview Video
 Complete Questionnaires | *Kolbe A Index* | *Natural Behavior DNA* | *Communication DNA*
 Review Assessment Reports | *Kolbe A Index* | *Natural Behavior DNA* | *Communication DNA*

QUEST Assignment

Complete QUESTionnaire	Questions to Answer to Complete your Quest
Financial DNA Comparison	Discuss the FINANCIAL DNA Comparison Report with Parents
Communication DNA	Have Business Leadership Team take a C-DNA, then Interview
Read Book Abstract	Highlight Notes in <i>Family Wealth</i> by James E. Hughes, Jr.

STRATEGY BRIEFING

Title

Exit & Transition Planning

Objective

To gain understanding, perspective, and wisdom related to leadership transitions and pre- and post-transaction aspects of a sale, transition, merger, or acquisition of business interests.

Presenters

Blankenship CPA Group	<i>C.J. Blankenship CPA and M&A Team</i>
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Prerequisite

Review Presenter Bios

QUEST Assignment

Complete QUESTionnaire	Questions to Answer to Complete your Quest
Enhance Biz Value Checklist	Interview Business Owner to Discuss and Complete Checklist