



2020 Alliance Franchise Brands Learning Sessions

"Leadership and learning are indispensable to each other." – John F. Kennedy

Are you ready to learn something new? Build your skills and discover new ways to solve common business challenges during the 2020 Convention Learning Sessions, led by Franchise Members, third-party experts and Home Office Team Members.

All sessions are geared toward Sign & Graphics Division (SGD) Members, Marketing & Print Division Members (MPD) Members or Franchise Members in both divisions. The sessions that are division-specific are indicated as either MPD or SGD.

If you have any questions about class choices, please contact Jennifer London at jenniferl@alliancefranchisebrands.com. To register for the Convention and select sessions to attend, visit www.AFBConvention2020.com.

Wednesday 3/25

Pre-Convention Workshops

CoreBridge

8:30 a.m. – 2:30 p.m. · Lunch will be provided at noon

Instructor: Melissa Wilcken, CoreBridge, Nick Geier & Will Brown, Home Office

Geared to: SGD/Dual Brand Only

Join members of the Home Office Support Team, as well as representatives from CoreBridge, for a more in-depth and advanced discussion of the current CoreBridge system. If you are a current CoreBridge user, this workshop is for you. Learn advanced skills that will enable you to utilize CoreBridge to its fullest potential for you and your staff.

PrintSmith

8:30 a.m. – 2:30 p.m. · Lunch will be provided at noon

Instructor: Ron Teller, EFI

Geared to: MPD Only

Come see the new Fast Track User Interface in PrintSmith Vision. You will learn how the new workflow can improve efficiency and productivity. Get some tips and tricks to optimize the user experience and get more out of the program than ever before. You will also see why using all of the functionality can assist you in maximizing profits and tracking real costs.

Printers Plan

8:30 a.m. – 2:30 p.m. · Lunch will be provided at noon

Instructor: Paul DiAngelo, Print Reach

Geared to: MPD Only

In this session, we will:

- Take an in depth look at the key features and improvements included in 2020 version of Printer's Plan.
- Explore the Cloud Hosted version of Printer's Plan and see how this solution will benefit your company.
- Discover the CRM tools of Printer's Plan and learn how they can help you develop, improve, and retain your customer relationships.
- Expand your understanding of setting your system up to manage large-format applications and integration with online storefronts.
- Review the Printer's Plan development road map.

Thursday 3/26

Workshops

Beyond the ORS: New Tools for Understanding Your Business' Financial Status

9:30 a.m. – 12:15 p.m.

Instructor: Mike Dye, Home Office

Geared to: MPD • Available to: MPD/Dual Brand Only

This session will offer insights and opportunities for Marketing & Print Division Members to understand and identify real financial indicators in their business. Learn how to read and understand your P&L and Balance Sheet to make solid business decisions. The session will provide in-depth ways to identify and compare KPI's in your business and give real-life meaning to them and how to take action. **Note: You will need to have your 2018 Individual ORS Report to participate.** You'll learn:

- The Financial Cycle
- Adding Clarity to the Numbers
- Influencing the KPI's
- The Stage of your Business, KPI's and Cash Flow

Customer Care Analysis Using Your Center's Dashboard

9:30 a.m. – 12:15 p.m.

Instructor: Bridgitte Rutkowski, Home Office

Geared to: MPD • Available to: MPD/Dual Brand Only

The Centermark Dashboard is where you can view valuable data that enables you to improve your Center's customer service experience. This session will show you how to turn your data into actionable tactics and improve your Center's performance. You'll learn:

- Why listening to calls and rating leads are important to your Center
- How to access your leads within your Centermark dashboard
- What to listen for when reviewing recorded calls to improve sales conversions
- How to provide coaching to your Team

Learning Sessions

Session A: 9:30 – 10:45 a.m.

A01: Lead Generation Machine: Best Practices in B2B Prospecting

Instructor: Jessica Eng, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

If you're looking for organic growth in your business, you need to be consistently filling your lead generation pipeline. But lead generation doesn't always happen quickly, considering the best new customer for you is likely already working with another provider. Join this past-faced session to learn:

- How to set business and lead generation objectives
- The best ways to identify the most qualified prospects in your market
- The dos and don'ts of lead gen and nurturing activities
- Top 10 low-cost lead generation tactics
- Tips on lead follow-up to drive conversion

A02: The Recipe for Managing Your Marketing & Sales Efforts

Instructors: Dori Bennett & Tiffany Moss, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Do you have all the ingredients to turn your marketing efforts into sales wins? This session will show you how to combine your marketing tactics and sales efforts to create the "secret sauce" for success. You'll learn:

- Surefire ways to integrate marketing and sales planning
- A step-by-step sales process for following up to marketing leads
- The top "must-have" activities to include in your marketing plan
- Important ways to establish accountability for your sales team

A03: The Customer Journey: Your Path to Increased Revenue

Instructor: Kelley Haynes, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Increasing revenue in today's competitive marketplace means differentiating your business from the commodity providers and adding value to your customer's business. That means understanding their goals and creating realistic expectations about the role that you can play, whether you're working on a branding project or a direct mail campaign. Join this session to learn:

- Key questions to ask to understand a client's goals and pain points so you can make the right strategic recommendations
- The most common mistakes to avoid when presenting a proposal to a client
- How to use tools, like the customer journey, to position yourself as a business consultant and align your recommendations with their goals and objectives
- What benchmark data to reference for different channels so you can manage expectations about ROI and sales results

A05: Direct Mail – Pushing the Envelope

Instructor: Daniel Dejan, Sappi

Geared to: MPD • **Available to:** MPD/Dual Brand Only

To help you take advantage of direct mail's current, versatile capabilities, this learning session includes a review of the fundamentals of creating a direct mail strategy, including prioritizing the elements of your plan, selecting a target audience, creating and acquiring a mailing list, crafting a viable message, designing a format and calculating the facts and figures that will validate the success of your efforts. We'll dive into specific creative approaches that outline cutting-edge applications for designing and printing paper products. We'll also review technical guidelines and rules, including current information from the United States Postal Service, that determines cost and mail-ability.

A06: Practical Methods for Continuous Improvement

Instructors: Brian Hunter & Lauren Jacobson, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

"Oh my, what a boring subject." Hold on there! When people hear Continuous Improvement, they often think six sigma, tons of data, lots of meetings, etc. It's much more than that. Continuous Improvement is a philosophy and a culture to live by. It's not just data and process. It can also mean improving your team, morale, the products you manufacture and the spaces you work in. Many times, it doesn't start with a spreadsheet. Join us to learn:

- The broad scope of how a culture of continuous improvement can change your business
- Some simple steps to get you started
- Tools and technology to manage projects
- Advanced methods for manufacturing and process management

A07: Enhancing Your Digital Presence with Centermark

Instructors: Andrew McQuain, web.com & Andrea Stapleton, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Your website is one of your most powerful tools used to push targeted customers and potential customers through the customer journey – from awareness to advocacy – creating a continuous loop of opportunity. This starts with understanding the ins and outs of the Centermark dashboard, as well as how search engine optimization (SEO) and pay-per-click (PPC) are critical to driving website traffic and leads. You'll learn:

- How to take full advantage of Centermark dashboard enhancements
- Best practices for reviewing and rating leads (calls and form submissions)
- The monthly reports you should be reviewing to understand and analyze performance
- What SEO and PPC are and why they're better together to drive sales growth

A08: Focus Canada

Instructors: Scott Brenneman, Colleen Finn & Meghan Taraszkiewicz, Home Office

Geared to: Canadian Franchise Members • **Available to:** Everyone

This session can help you understand Canadian industry and network trends and influencers that can impact the way you conduct business as well as identify new opportunities for your Centre. You'll learn:

- How Canadian supplier partnerships can benefit your Centre
- How you can adapt success stories from around the Canadian Region and network in your market
- The most effective ways to introduce or expand diversification initiatives to drive growth

Thursday 3/26

Session B: 11:00 a.m. – 12:15 p.m.

B01: Managing Your Online Reputation to Boost Business

Instructor: Laura Mayo, web.com & Tiffany Moss, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

In today's digital world, most people research businesses using Google, Yelp and other online review sources before making a purchase decision. In fact, 91% of consumers report that they read online customer reviews to determine whether a local business is good or bad. Did you know that online reviews are one of the top-ranking factors when determining where a local business shows up on the search engine results page? Maintaining a positive online reputation is crucial in moving buyers along in their buyer journey. In this session, you'll learn:

- The latest trends in online reviews
- The SEO benefits of getting customer reviews
- Simple tactics to grow the number of online reviews
- Steps on how to reply to customer reviews – positive or negative

B02: Navigating Sales & Marketing Activities to Attract & Communicate with Key Contacts

Instructor: Lisa Hill, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

All business contacts are not created equal – they have different roles and responsibilities, varying needs and priorities. And to make it even more challenging to navigate, new generations of decision-makers are entering the business world which disrupts our approaches and may impact our effectiveness with getting the right message to the right contact through our marketing and sales efforts. During this session, we will discuss this changing landscape and how you can take effectively adapt your activities to connect with buyers of different generations. You'll learn:

- The different profiles of today's business contacts and what makes them tick
- Trends in how to effectively communicate with these contacts via both marketing and sales activities
- Tools to maximize interactions with your contacts and ensure you are "speaking their language"

B03: Growing Your Business Through Signage

Instructors: Colleen Finn & Gary Owen, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

A recent SGIA survey revealed that 94% of printers see graphics and signage as the best opportunity for expansion to better serve their customers. Wide format services need to be supported with training, and a unified sales force capable of selling everything your business has to offer. Join this interactive session to create your roadmap to successfully growing this exciting market segment.

B04: This is Your Brain on Paper

Instructor: Daniel Dejan, Sappi

Geared to: MPD • **Available to:** MPD/Dual Brand Only

This learning session will start with a recap of the *Haptic Brain/Haptic Brand* presentation but want more insight into the power of print, then this session is for you. We'll present a deeper dive into the discussion of ink-on-paper in comparison to digital communication. We'll cover how the sense of touch influences readers' perception and retention of brand and marketing communications. We'll dig deeply into bi-lateral literacy and its impact on how content is perceived. And, we'll discuss how 'constant distraction' affects our ability to learn, to comprehend and to retain the vast amounts of information we are bombarded with every day.

In this session, we'll cover:

- The results of the Millward Brown study showing how ink-on-paper stimulates our senses and how it affects brand and content perception.
- The endowment effect, its impact on desire and why quality matters.
- Information from Dr. Mary Anne Wolfe, neuroscientist and author, helping marketers dig deeply into bi-lateral literacy.
- The value of hand-written notetaking.

With this information, marketers, designers, brand owners and print production managers will add more horsepower to their brand communication knowledge.

B05: Creating & Marketing Your Online Retail Store

Instructors: Ryan Mastako & Andrea Stapleton, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Today, businesses and consumers expect the convenience of ordering a product or service online. In this session, you will learn what it takes to get set up with a branded online retail store for your Center, from product and pricing setup to final launch of and marketing of your new online retail store. We will share best practices and success stories from other Franchise Members and more!

B06: Introduction to PlanProphet: A Customer Data Integration Tool

Instructors: Lemay Sanchez, PlanProphet & Jessica Eng, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Learn how your Center can track, monitor and evaluate customer interactions to drive sales success utilizing PlanProphet, a Salesforce® base platform. Track every interaction between your staff and your contacts, create and delegate tasks and also sync live to your MIS data! Discover how others have begun to uncover the power of data integration to protect and grow their clients and streamline their prospecting activities.

B08: Managing Projects: Defining a Plan for Success

Instructors: Paul Wywrot & Kelley Haynes, Home Office

Geared to: MPD • **Available to:** MPD/Dual Brand Only

Starting with the basics of project management, we'll walk you through how to identify an opportunity and define a plan for success. Learn to recognize what qualifies as a project – you have more of them than you think – and which core steps apply. You'll learn:

- The primary goal or objective
- Who the stakeholders are (client, consumer, staff, supplier, Franchise Member)
- The desired timeline and if it's realistic
- The costs involved, including hard costs and soft costs, like staff time
- How to define success and when you know when a project is done
- How core steps can be applied every day for hiring staff, buying equipment or launching a new product or service

Friday 3/27

Workshops

Dual Brands Workshop: Refining Our Vision and Planning for Your Future

2:00 p.m. – 5:00 p.m.

Instructors: Brian Hunter, Gary Owen, Jessica Eng, Burke Cueny, Mike Dye, John Castillo, Home Office

Geared to: Dual Brand • Available to: Dual Brand Only

We spent the better part of 2019 really digging deep into what makes a dual brand business tick. We heard feedback from dual brand Franchise Members. We engaged with dual brand customers and team members. We also worked with outside resources to gain greater perspective. What we learned has informed a refined vision for dual brands. What we are planning will streamline the way we support your business operations. You'll learn:

- How dual-branded locations are performing now and where there's room to improve
- The data gathered from the field that can help you develop an action plan to drive growth
- How enhanced Dual Brand support will make it easier to manage your business
- Ways to apply a refined sales and marketing approach

Creating a Safe Work Environment in your Center

2:00 p.m. – 5:00 p.m.

Instructor: Brian Baker, Home Office

Geared to: Everyone • Available to: Everyone

Are your employees working in a safe and healthy environment? Learn about how to incorporate Safety Standards into your Center. You will become familiar with the written/training documentation that safety inspectors may look for if they were to visit your facilities. You will learn:

- How to write a Hazard Communication Plan
- How to write an Emergency Action Plan
- How to write a LockOut-TagOut Plan
- How to write a Fire Prevention Plan
- How to acquire, read and inventory your Safety Data Sheets

Learning Sessions

Friday 3/27

Session E: 2:00 – 3:15 p.m.

E01: WorksStream™ Workflow: Driving Efficiency and Profitability

Instructors: Danny Wilson, Ryan Mastako & Nick Geier, Home Office

Geared to: Everyone • Available to: Everyone

We continue to feel the pressure of a consolidating industry with tighter margins and faster turnaround requests. We must maximize the resources we have and ensure the engagement of our team with our customers who have the highest value impact. In this session, you'll learn:

- The WorksStream™ workflow, integration and automation options
- What you can do for your business to take the first step or the next step
- How your time and resources can be redeployed to revenue-driving activities

(This class is also offered in Session F.)

E02: Finding & Retaining Employees for Your Center

Instructor: Stacy Stetner, HR Elevated

Geared to: Everyone • **Available to:** Everyone

We are all looking for the "perfect" candidate. You know, the one who has it all. The required skills, a great attitude and is happy to accept any rate of pay for the satisfaction of working for a great company. The reality is the "perfect" candidate is a rare find. Finding your next great Team Member depends on several factors, the first being how well the open position is defined. A clearly defined role that outlines essential skills needed is key to finding candidates who can best meet your needs. It is also the key to keeping them! This session will introduce you to best practices on how to source, recruit and retain great Team Members.

E03: Social Media 101: Getting Started with Social Media

Instructor: Gillian Losh, All Points & Meghan Taraszkiewicz & James Lyons, Home Office

Geared to: Everyone • **Available to:** Everyone

A full 90% of brands use social media to increase brand awareness, and 40% of digital consumers use social networks to research a product or brand before a purchase. If you are interested in leveraging social media for your Center, this session will help you understand the best channels to use, how to create a content calendar, how to manage your pages and ways to build your audience.

E05: Best Practices for Improving Everyday Activities with Office 365

Instructor: Paul Wywrot, Home Office

Geared to: Everyone • **Available to:** Everyone

Using the right tool for the job is essential for success, and when it comes to business, Office 365 contains a wealth of valuable options to get standard tasks completed. This session will focus on recommended best practices and how-to strategies for common activities that we do every day. You'll learn:

- How to take control of your Outlook inbox to eliminate clutter so you can focus on the most important messages
- Ways to plan efficient meetings with agendas, objectives and time limits
- When to play defense with your Outlook calendar to ensure time remains for critical business planning
- The steps to using OneNote as a team reference for shared meeting notes and decisions
- How to leverage OneDrive's cloud storage for document collaboration and sharing

New to OneDrive and OneNote? No problem! We will also review the set-up process and take a tour of the most valuable features and benefits.

(This class is also offered in Session F.)

E06: Flexing Your Acquisition Muscle at the Right Place and Time

Instructors: Mike Cline & Jim Jehl, Home Office

Geared to: Everyone • **Available to:** Everyone

Learn from those who have nurtured relationships with their local competition to grow revenue through acquisitions. You'll learn:

- How to effectively approach local independents
- Ways to keep the conversation going until they're ready to sell
- How to use supplier connections to be there at the right time
- Tips to build top line AND bottom line revenue
- When to use your Regional Director and the Mergers & Acquisition team to succeed

E07: Business Planning with EOS: Simplified and Effective!

Instructors: Bill Parks, Ray Long & Ryan Keogh, Home Office

Geared to: Everyone • **Available to:** Everyone

As the adage goes, “Those who fail to plan, plan to fail.” So, let’s plan for growth, profitability and your strategy to reach your goals. How successful are you with your business planning and goal setting? Are you holding yourself and your team accountable for business outcomes, or do you see room for improvement? The Entrepreneurial Operating System• (EOS) has been successfully integrated throughout the network to, put it simply, ensure things get done! Whether you’re a new owner, have been at it awhile or are getting ready to sell, the EOS Business Plan will help keep you focused. You’ll learn:

- How setting your Goals, defining Action Items and addressing Issues will IMPROVE your business
- Ways to empower your team and include them in your plan to GET THINGS DONE
- How to partner with your Regional Director to develop your plan in 5 Easy Steps

E09: Sales Growth with Strategic Networking & Referrals

Instructors: Ron Frost & Lisa Hill, Home Office

Geared to: Everyone • **Available to:** Everyone

One of the fastest ways to grow your business is through effective networking and developing referrals. However, to maximize the value of networking, there are certain key strategies and best practices that are helpful to follow. Good, mindful professional networkers are not only consistent, they also know how to build effective relationships, have great listening skills and are conscious of adding value to others. If you are seeking to grow your network, maximize your business relationships and leverage your opportunity for referrals, then you don’t want to miss this class! In this session, you will learn:

- How to maximize your networking effectiveness through simple strategies
- Ways to grow your contact list and your business by growing others
- Tips to develop natural rapport-building habits to gain trust and likeability
- How to ask for referrals the easy way (and give them too!)

E10: Keynote Breakout: How to Choose How You Show Up

Instructor: Dan Rockwell, Leadership Freak

Geared to: Everyone • **Available to:** Everyone

Choose how you show up or someone else will. When your day is spent running from one task to the next, you end up losing yourself along the way. If you’ve ever ended the day exhausted but wonder what you got done, this presentation is for you. Discover tools and techniques to gain focus and maintain direction even in turbulent situations. You’ll learn:

- The definitions of leadership that freak people out
- What to do before you get out of your car
- How a lumber yard clerk showed up and changed the world
- Actionable strategies that bring immediate value to you, your team, and organization

(This class is also offered in Session F.)

E011: Enhanced Customer Experience Engagement, Marketing and Analytics

Instructors: John DiPippo, LoyaltyLoop & Tiffany Moss, Home Office

Geared to: Everyone • **Available to:** Everyone

This session will cover common issues associated with engaging customers in your feedback loop during their entire journey with your business. We will discuss the methods of reducing friction in the feedback loop to increase both quality and quantity of responses, as well as discuss the ways in which customers may wish to engage you in an increasingly mobile-centric world. You'll learn:

- How to employ surveys optimized for mobile devices
- How to use in-email survey questions to increase responses
- How to send surveys via text message (SMS) in addition to email
- How to gather images and videos with multimedia testimonials
- Ways to improve your Google search results with new reviews page
- Tips to run satisfaction summary reports to uncover new trends

Friday 3/27

3:30 – 4:45 p.m.

F01: WorksStream™ Workflow – Driving Efficiency and Profitability

Instructors: Danny Wilson, Ryan Mastako & Nick Geier, Home Office

Geared to: Everyone • **Available to:** Everyone

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- The WorksStream™ workflow, integration and automation options
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- How your time and resources can be redeployed to revenue-driving activities

(This class is also offered in Session E.)

F02: Coaching Your Team to Success

Instructor: Stacy Stetner, HR Elevated

Geared to: Everyone • **Available to:** Everyone

Expectations, feedback, accountability, results, and documentation are many of the activities and keywords associated with performance management. Although it sounds straightforward, many leaders find some or all of these pieces uncomfortable, frustrating and even daunting from time to time. Employees feel the same. Coaching for success explores the many benefits of how and why coaching can alter your culture for the better. This session is for anyone wishing to enhance communication with their team. We will share tips, tricks, stories and tools you can use in your Center.

F03: Social Media 201: Getting More Advanced with Social Media Platforms

Instructor: Gillian Losh, All Points & Meghan Taraszkiewicz & James Lyon, Home Office

Geared to: Everyone • **Available to:** Everyone

In the next five years, social ad spending is projected to increase by 73%. Join this session if you have been using social media to learn what channels to use, the types of posts to invest in, what content delivers the most impressions and what analytics you should monitor to ensure you are making the most of your social media presence.

F04: Built to Sell: Succession Planning

Instructor: Mike Cline, Home Office

Geared to: Everyone • Available to: Everyone

Whether retirement is three, five or ten years out, it's never too early to start planning your exit strategy. Become aware of the warning signs that are targeted towards local business owners who fail to plan for their future. Attend this candid informative session, and you'll learn from recent sellers and buyers on how to exit on your own terms when you are ready.

F05: The Hub

Instructors: Ted Grossutti & James Smackum, Home Office

Geared to: Everyone • Available to: Everyone

Discover how you can leverage the Hub to access the latest news and information from across the network. Confidently choose the best supplier partner for your requirements based on the new Supplier Directory rating and feedback system. Allow your Home Office to serve you better by easily maintaining accurate and up-to-date information about your Center and staff. And learn how to effectively use the support case system for efficient, prompt service from the Home Office.

F06: Best Practices for Improving Everyday Activities with Office 365

Instructor: Paul Wywrot, Home Office

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F07: Family Business Success

Instructors: Roger Peters & Scott Brenneman, Home Office

Geared to: Everyone • Available to: Everyone

The pros and cons of running a family business are no mystery to those in them! Discover how to take full advantage of the benefits of a common business goal with your built-in support system and ways to avoid typical gaps in communication that can spell trouble. You'll learn the most effective ways to navigate the potential pitfalls of business succession to ensure a profitable, long-lasting legacy for you and yours.

F09: Source, Sell and Succeed with Promotional Products

Instructors: Mike D'Ottaviano, ASI & Nick Wood, Home Office

Geared to: Everyone • **Available to:** Everyone

As a service diversification, promotional products can become a significant profit center when approached strategically. With so much competition through online sources and local competitors, how can you differentiate yourself to capture more sales? In this fast-paced session, you'll learn:

- The keys to sourcing products at any price point efficiently to add value to your service
- How to sell promotional products to a wide range of customers for their lead gen, customer retention and employee retention goals
- Support available through ASI to get you started or inject new life into your promo products sales

F10: Keynote Breakout: How to Choose How You Show Up

Instructor: Dan Rockwell, Leadership Freak

Geared to: Everyone • **Available to:** Everyone

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