



*"I am grateful, excited, and continue to love what I do as we enter X5 Management's 17th year in business. I am incredibly humbled to work with such a great and skilled team of professionals and for our valued clients.*

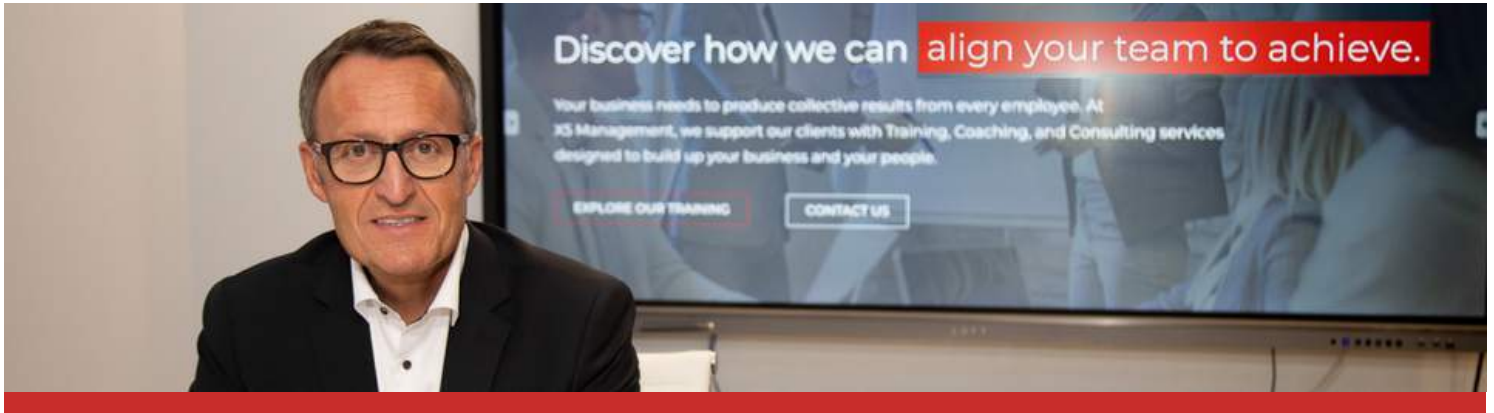
*Our team has grown and our services have expanded to serve the business community in so many aspects of Training, Coaching, Consulting and Strategic Planning. We have some new services in the pipeline, too, and I am looking forward to rolling those out soon.*

*I would like you to "meet" the X5 Management Team, and learn more about some of our speciality services."*

-Mike Mack

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## Mike Mack, President

Mike Mack is a sought-after Leadership Coach, Consultant, Trainer, and Facilitator. He has been helping business teams maximize their potential since 2006 with the use of tailored consulting and training programs, along with coaching advice. For Mike, it's about trusted collaboration with his customers. He is passionate about helping organizations increase their customer satisfaction, improve employee retention, and achieve profitable growth. He supports business in the areas of: Customer Service, Sales Growth, Team Building, Leadership Development and Strategic Planning.

He is a two-time Amazon bestselling author: **REMARKABLE SERVICE – How to Keep Your Doors Open**; **RELATIONSHIPS FOR KEEPS – How to Build Powerful Relationships in Business and in Life** is Mike's second best-seller. Mike is working on his third book, **LUNCH WITH LEADERS – Real Stories of Pivotal Moments for Today's Executive**, scheduled to be published in early 2023.

## First Impressions in Customer Service

First impressions (especially in customer service) are everything. As the quote by Oscar Wilde goes, "You never get a second chance to make a first impression."

Although it seems quite self-explanatory, many businesses do not ask themselves, "What is my customer's first impression"?

If that were always kept top of mind during every single customer touchpoint, businesses would:

- Improve customer loyalty and enhance lifetime value
- Develop customer relationships more quickly
- Increase word-of-mouth referrals
- Lower attrition, with both internal and external customers
- Eliminate customer complaints
- Create customer service consistency throughout departments





## Remarkable Service - Mike Mack

Whether a customer walks through your front doors, phones in, or checks your company's website enquiring about your products or services, their experience will form a lasting impression of your organization. This impression can create ripple effects as they form opinions on whether or not to conduct current or future business with you and tell their service stories to others.

There are many other businesses, locally or nationally, that one can look at for comparisons to decide if one has more opportunities than another, in your opinion.

When you compare and/or assess Moment of Truth, if the experience is inconsistent, a consideration is that the communication of expectations, and training, could be inconsistent too.

### **What is the “Moment of Truth” for your business efforts?**

How often do you evaluate your Moment of Truth within your business? Have you considered asking your customers? What about the perspective of customers who didn't buy your product or service? Could it have been a poor, or mediocre, first impression?

### **Customer Service Training and Culture**

Start by listing all of the opportunities for a customer to form an impression of your business, all departments, and any team member.

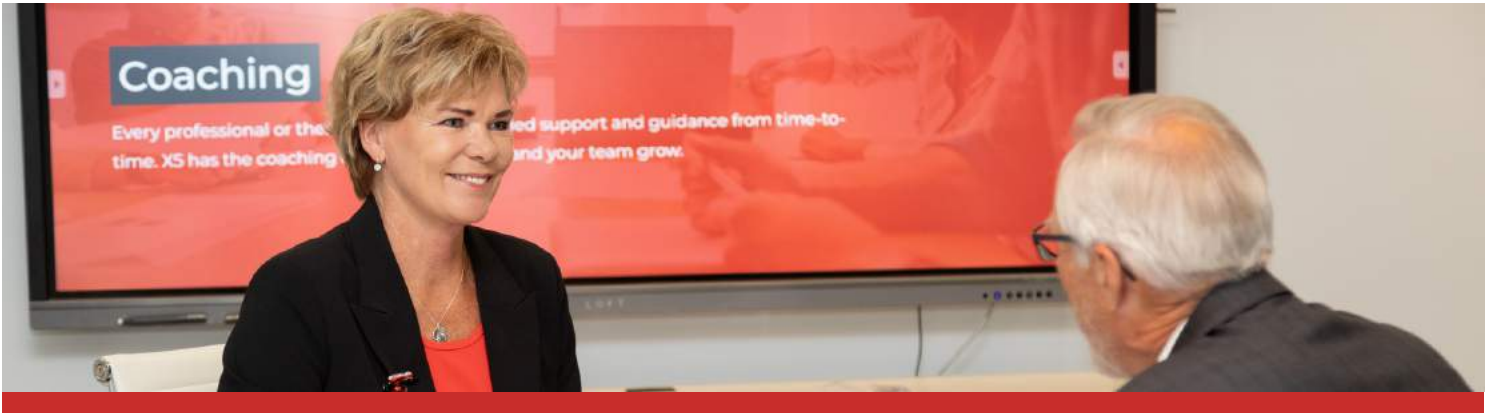
Are you offering remarkable customer service in these situations?

Are your service expectations supported through employee training in areas like:

- Sales Training
- Customer Service Training
- Team Building
- Leadership Development
- Communication
- Conflict Resolution
- Emotional Intelligence

Never leave your service levels to chance, industries are competitive and consumers are demanding. Now is the time for Remarkable Service!

*For Mike, every relationship is built on Like, Respect and Trust.*



## **Kris Schinke, Leadership Coach, Trainer, and Facilitator**

Kris is a focused and goal-oriented business professional with extensive executive experience in retail, financial services and not-for-profit. She has a passion for inspiring and coaching others and believes a positive work culture is key for business growth and sustainability. She is adept in training, leadership and promoting teamwork.

She has known Mike Mack of X5 Management for over 12 years and their professional paths have crossed many times, including their MBA program and the extensive involvement in Toastmasters. They are collaborating on supporting business clients through Coaching, Training and Consulting services.

Kris is an avid volunteer and loves to donate time and effort to a variety of organizations. The past 2 years Kris has been a business mentor with ERIEC (Edmonton Region Immigrant Employment Council), working with professional newcomers for job placement and career advancement. This role also has also offered some personal benefits, such as improving knowledge about multicultural leadership and competencies.

### **What is Diversity, Equity, and Inclusion?**

It is a phrase that describes what organizations need to consider creating an environment that welcomes, and includes, all identities. We know this as DEI. Forward thinking organizations are now making DEI part of their overall strategy not assuming awareness will happen on their own.

According to Independent Sector, a national membership organization that brings together a diverse community of changemakers with a mission to foster a sense of belonging, leaders are uncertain about the steps needed to turn dialogue – and intention – into action. Many organizations have the desire to increase diversity, but the reality of an environment that enables people of different backgrounds to succeed isn't translating to success.







## Diversity and Inclusion - Kris Schinke

DEI has always been an important, albeit not often spoken about, initiative and a number of events in the past few years have brought societal awareness forward. Events such as the #metoo movement, Black Lives Matter, and Every Child Matters after the discovery of unmarked children's graves at residential schools. It is no longer a "nice to have" workplace program, but rather a necessary part of organizational culture, carefully woven into policies, procedures and day-to-day interactions.

### What we Know:

- Boston Consulting Group found that diverse management boosts revenue by 19%
- Deloitte found that diverse companies enjoy 2.3 times higher cash flow per employee
- Deloitte also found a diverse workplace has 30% better team performance results
- McKinsey found that 43% of companies with diverse boards noticed higher profits
- According to Glassdoor, 69% of executives rate diversity and inclusion as an important issue

In December 2020, the Federal Government announced its 50 – 30 Challenge that asked Canadian organizations to aspire to gender parity on boards and senior management as well as 30% representation on boards and senior management of other underrepresented groups, including Aboriginal peoples, racialized persons, people living with disabilities (including invisible and episodic disabilities) and members of the LGBTQ2 community. Unfortunately, there are no accountability measures and therefore reported changes do not appear to exist.

It is time for all decision-makers to recognize the importance of DEI, and ensure thorough and comprehensive programs and initiatives are implemented for the wellbeing of the entire workforce. The value shared cannot be measured, but the gains will be felt. It really is an organizational priority for today's culture.

*Kris believes giving back is the greatest reward.*



## **Brent Collingwood, Executive Coach and Certified Facilitative Leader**

With over a decade of coaching, consulting, and facilitating, Brent Collingwood has earned a reputation as a go-to resource in helping clients reach into the realm of possibility. Whether coaching a senior executive or facilitating a strategic planning session, Brent acts as a thinking partner, helping the organization establish and ultimately achieve its planned goals.

Brent holds a Master of Education in Leadership and Change, is a Certified Facilitative Leader, a Certified Executive Coach (CEC), and a member of the International Coaching Federation (ICF). Brent's leadership experience in business, post-secondary and the non-profit sector allows him to bring extensive knowledge and experience to the table.

## **What Can Strategic Planning Do for a Business?**

It is a phrase that describes what organizations need to consider creating an environment that welcomes, and includes, all identities. We know this as DEI. Forward thinking organizations are now making DEI part of their overall strategy not assuming awareness will happen on their own.

In today's world of sudden and significant change, the race for innovation and the need for nimbleness, many organizations struggle with their daily tasks. Work becomes scattered, unfocused and reactive, as opposed to proactive. Everything is a priority, and therefore nothing is a priority!

John Doerr, the recognized guru of Objectives and Key Results, points out that setting goals that align with your ambitions, passion and purpose set a clear and compelling sense of "why."

This is where a Strategic Planning session can help you focus on your WHY, that inspires and motivates your teams to create those difficult but achievable goals.





# Strategic Planning - Brent Collingwood

It is ideal to prepare for a Strategic Planning session with your team. These sessions may be over one or two days. Utilizing a Facilitator will ensure the planning session stays on track and the business leaders can participate, rather than be distracted running a meeting.

A consistent challenge is that organizations rarely take the time to collaborate, get input from all organization members and share important information amongst their teams. Strategic planning should represent an opportunity to discuss current issues, reflect on successes and challenges as well as ensure your team is well-informed moving forward.

## Five Strategic Planning Tips:

1. **Go offsite** – this will allow your team an opportunity to avoid workplace distractions and spend quality, focused time together.
2. **Stick to key themes** – there are always many challenges and key areas to discuss during any planning meeting. Depending on the timeframe, pick two or three key areas to focus on and follow the time allowance on the agenda closely.
3. **Get input from everyone** – it is easy to spend too much time presenting during a strategic planning session. However, making time to get team members input is equally as important. Carve time for questions after every presentation and make sessions interactive.
4. **Break the silence with breakout sessions** – small group discussions and activities will allow everyone in attendance to be involved. Have activities start with small group discussions, where group highlights are brought to the attention of all participants upon completion of an activity.
5. **Narrow the priority list** – action items are a significant final step to any strategic planning session. However, if this list is too daunting, many items may fail to materialize. Select your critical few items and set timelines for execution.

Once the planning session is concluded, work with a Facilitator to set an execution plan that brings the discipline you need to move those ideas forward. Follow-up sessions are recommended with your team throughout the year where your Facilitator serves as an Accountability Partner to ensure you stay on track.

*Brent is a thinking partner to help you discover new possibilities.*



## Priscilla Bahrey, Facilitator and Leadership Coach

As a project manager, speaker, trainer, facilitator and coach, Priscilla has passion for inspiring people to maximize their personal and professional potential. Drawing on over 20 years of experience leading teams, facilitation, training, consulting, and coaching, she sees rewards by building competencies within individuals and organizations. I have had the pleasure of contributing to the success of thousands of leaders, teams, and individuals.

To every facilitation or coaching engagement, Priscilla brings her motivational communication style, down-to-earth approach, and real-life experience to facilitate lasting change, both virtually and in person. As a PMP Certified Consultant, she shares her experience gained through various consulting engagements in finance, government, technology, oil and gas, higher education, and engineering and lean manufacturing sectors.

One of the most challenging opportunities is to support clients and teams through transition and supported clients through organizational change and help them to realize success. Priscilla's ORSC (Organizational Relationship Systems Coaching) training has brought a fresh approach to leadership coaching, facilitation, and instructional design. ORSC tools and concepts unlock potential in people that sometimes they are not aware of and helps teams to overcome challenges and collaborate in a more effective way.

### Project Management can Help With That

When I have met with executive leaders and senior project managers to discuss challenges that face their organizations, sometimes they tell me that they have a need to have everyone on the "same page". It seems that operations, marketing, distributions, sales, IT and HR are in their own little world. The executives have said it would prevent so many misunderstandings and duplication of work if there was a common understanding of goals and objectives and consensus of work towards those goals. Project management can help with that.







## Project Management - Priscilla Bahrey

Another challenge I often hear is about stakeholder management. It is a very costly problem because when a stakeholder group is missed, it can lead to costly additional work or even having to hire entire departments to manage a stakeholder group whose needs were overlooked. Project management can help with that.

Whenever I work on volunteer projects, I am impressed with the level of commitment and motivation on those projects. When everyone understands how their small piece of work contributes to something that they believe in and they feel that they are part of something bigger than themselves, they work tirelessly toward that making that vision a reality. Project management can help with that.

Risk management is another area that, if understood, can reduce expensive overages and contribute to confidence in operations. Imagine being able to identify potential risks, create mitigation plans, assign accountability around risk and deal with problems before they become exponentially expensive or, worse yet, negatively damage public perception or reputation. Project management can help with that.

To gauge the importance of communication, the Project Management Institute (PMI) did a study called "The pulse of the profession" that measured the impact of ineffective communication. They stated that 56% of an organization's budget is at risk due to ineffective communication. Having a communication plan that takes into account all stakeholders and the frequency and method of communication prevents over or under communication and, in turn, builds buy-in across the organization. Project management can help with that.

Having a plan is essential to a successful project, and it increases your confidence. There is an old adage that "fail to plan is a plan to fail" Building a project plan that is approved and agreed to before any work is done, contributes to successful execution. Project management can help with that.

Finally, I cannot overstate the value of communicating all work that is to be done, who is doing it, when and scheduling assumptions (percentage of time available to work on a task) can give you is this concept.

*Priscilla empowers people to achieve their personal and professional best.*



## **Gord Sheppard, Consultant, Trainer and Facilitator**

Gord is a Consultant, Trainer and Facilitator who is passionate about helping leaders to grow their organizations. Because he knows that when your organization is strong then everybody wins including your staff, customers, suppliers and ultimately your community.

From strategic planning to conflict resolution, process improvement to helping leaders take action, Gord applies more than 25 years of business experience. He also has an MBA, is a member of the Canadian Association of Management Consultants, and he is Prosci Change Management Certified, which gives him a wealth of proven strategies that he can use to help clients succeed.

He is also the author of the 'Meeting Leadership Solution' which offers a 10-step system to help leaders improve the overall productivity and profitability of their business meetings. Gord has also built the 'Ask A Business Expert' community, which features a website and YouTube channel that helps leaders find expert answers to their most important business questions. As a podcast host Gord's shows have over 20,000 downloads, and the 'Meeting Leadership Podcast' has helped thousands of professionals to improve their meeting productivity.

## **Meeting Leadership Solution**

Learning how to run highly effective meetings with the Meeting Leadership Solution is based on a proven 10-Step System that will help leaders and their teams to have highly productive and profitable meetings that will grow their organizations. The 10 steps are:

1. Get Real With Yourself
2. Get Real With Your Team
3. Know Your Total Meeting Cost
4. Get A Great Facilitator
5. Link The Meeting To Your Strategy
6. Build A Blockbuster AGENDA
7. Meet In The Right Space
8. Get Awesome Meeting Resources
9. Follow-Up FAST
10. Get Inspired And Take Action





## **STEP 1: GET REAL WITH YOURSELF**

In this step you'll discover techniques that will help you take responsibility for how you act during a meeting. So whether you're the facilitator or a participant, the techniques you learn in step 1 will make you more effective in every meeting you attend.

## **STEP 2: GET REAL WITH YOUR TEAM**

In this step you'll find practical ways to help you build trust with your meeting teammates. From effective listening techniques, to ensuring that you know how to fight effectively, the techniques you'll learn in this section will increase productivity in your meetings.

## **STEP 3: KNOW YOUR TOTAL MEETING COST**

How much are you spending per hour to meet with your team? This section will help you figure out how to measure the actual cost of a meeting which will then allow you to determine whether or not your meetings are actually worth having.

## **STEP 4: GET A GREAT FACILITATOR**

In this step you'll learn how to rate your current meeting leader. Once you determine their competency level, then you can decide whether or not they 'gotta grow' or 'gotta go'.

## **STEP 5: LINK THE MEETING TO YOUR STRATEGY**

Find out how you can stop any meeting, at any moment, and connect that moment directly to your organizational strategy. Once you learn this and apply this powerful technique, your meetings will give you a competitive edge within your industry.

## **STEP 6: BUILD A BLOCKBUSTER AGENDA**

Imagine what it would be like if every one of your meetings was as exciting as your favourite Hollywood blockbuster movie? Well, in step 6 you'll find out how to do just that by using the word AGENDA as an easy-to-remember acronym that will help you build inspiring agendas in a new and unique way.

*Cont'd on next page*



## **STEP 7: MEET IN THE RIGHT SPACE**

Where you meet matters as much as what you are meeting about. So step 7 will help you consider everything you need to create an exceptional meeting space that inspires your team to achieve greatness during meetings.

## **STEP 8: GET AWESOME MEETING RESOURCES**

No two meetings are the same. What worked for you last time may not work for you again. Because of this you need a variety of tools to help you optimize every meeting you attend. As a result, step 8 offers great book titles, articles, and links to information and inspiration that will help you make your next meeting exceptional.

## **STEP 9: FOLLOW-UP FAST**

Want to make more money? Have happier customers? Engaged staff? A more effective Board? Then you will want to learn to use our FAST acronym techniques after every meeting you attend.

## **STEP 10: GET INSPIRED AND TAKE ACTION!**

In this step we'll help you to figure out how to get inspired so you can immediately improve your meeting culture.

The workshop includes practical tips, strategies and hands-on learning that gives leaders the skills, confidence and inspiration they need to run more productive and profitable meetings.

*Gord believes in empowering leaders to grow their organizations.*





## QUESTIONS TO CONSIDER

### 1 What tools does X5 Management use to facilitate training?

X5 Management is an award-winning Authorized Partner of Everything DiSC®, and we start people on the path from personalized insights to culture change. Everything DiSC® offers a suite of personal development learning experiences that measure an individual's preferences and tendencies based on the DiSC® model.

### 2 Are grants or subsidies available to help with training costs?

The Canada-Alberta Job Grant is an employer-driven training program where employers use a third-party training provider like X5 Management to deliver formal training to new or existing employees. The grant provides businesses with the opportunity to provide training for their employees to enhance their skills to help drive optimal results.

### 3 Does X5 Management customize training for the workplace?

All of X5 Management's Training Solutions are tailored to meet our clients' ongoing needs for training and customized programs. Our team of Training and Facilitation Specialists work closely with our clients to achieve business success. If there is a request for a unique training program related to business, we can deliver!

### 4 How does one measure the ROI (Return on Investment) with employee training?

Traditionally ROI is measured by the training program benefits minus the cost of training. Although this may not be tangible in all situations, training is easily measured by reduced turnover, improved recruitment, a more successful succession plan and customer feedback. All of these factors point to a positive workplace culture with engaged employees.

**SCHEDULE A COMPLIMENTARY DISCOVERY MEETING**  
[WWW.X5MANAGEMENT.COM/CONTACT](http://WWW.X5MANAGEMENT.COM/CONTACT)

[GET STARTED](#)

