



FACILITATING EFFECTIVE COMMUNICATION & DYNAMICS PROGRAM

Your best clients and prospects (individuals, businesses, and other organizations, entities and groups) are demanding professional relationships and alignment with top advisors who have the skills, leadership and experience that will help them achieve their desired outcomes. This includes being an expert at facilitating effective communication and dynamics in the families and organizations with whom you work.

Are you comfortable and confident facilitating the communication and dynamics in your client families and organizations even when there are relationship blocks and conflict?

This Program will provide you with content, skills and experience that will put you amongst the elite in your field and distinguish you from your competitors.

The professionals who attended this program in early 2016 reported:

- "Effective resilient relationships in every quarter of your life...payback is multi-fold in no time at all."
- "Exceptional trainers. Great content."
- "By participating in this training program you will become part of a very small group who can impact families where they are."
- "ROI is extremely high, at minimum 10x, due to gained confidence, peace of mind for taking care of self to serve others (families, organizations, clients) to greater ability."
- "I just want to thank Rod and his team for having the imagination and courage to design a simply outstanding package of training for anyone interested in helping families and/or organizations find their voice and purpose. It has been a great privilege to have flown over from The UK to join each of the training sessions. To work with some of the best trainers in their field has been truly eye watering. It has been one breakthrough after another as insight after insight has been revealed along the way. Whether you are interested in developing yourself, your family, your business, your fund raising efforts, I couldn't recommend this programme more highly. It's changed my life and is already having a positive effect on those around me. As they say, if you want to change the world, start with yourself."



Written and video testimonials are also on our website.

This program was developed by The Heritage Institute and Rod Zeeb in collaboration with other individuals and entities who are widely acknowledged to be among the foremost authorities in the world in their field: Carter International Training & Development, Inc., (Doug Carter); the “3 Gaps” organization (Hyrum Smith and Richard Godfrey); and Vital Smarts (authors of the books *Crucial Conversations*, *Crucial Accountability*, *Influencer* and *Change Anything*).

In order to facilitate successful and dynamic meetings with clients or for families, organizations, and other entities or groups, you must:

1. Have proven and effective content to provide;
2. Be a superb facilitator who can effectively facilitate the delivery of the content in any meeting;
3. Be able to navigate the interpersonal communication and dynamics issues that often derail those meetings, and help the individuals and group develop the culture necessary to maintain healthy communication, trust and unity over multiple generations. More often than not, these negative dynamics and conflicts arise when one or more of the parties are harboring some beliefs that are inconsistent with the results they want;
4. Be able to help the individuals involved in the group to be personally focused and aligned; and
5. Provide all of the individuals involved in the group with the tools to hold themselves and others accountable.

This program will provide you with both the content and skills to expertly provide all of that.

The program includes three in-person sessions and follow-up materials. The in-person meetings will be held in Dallas, Texas on:

- Session 1 (June 12-14). The desired outcome of this Session is to have you be so comfortable with yourself and what you’re doing that you can pick a topic out of a hat, spend 5 to 10 minutes (or less) organizing your thoughts and then conduct an interactive workshop that creates measurable changes in behavior for the participants.



- Session 2 (August 9-10). This Session has two parts. First, you will learn how personal beliefs affect the outcomes we achieve, and how to adjust those beliefs if you are not getting the results you desire. You will practice on closing your own gaps, and be ready to help anyone around you close theirs. Second, we will use content you received from the first session and the first part of this session and develop models for providing these concepts to your clients and others.
- Session 3 (October 18-20). This Session also has two parts. During the first two days, you will learn and practice a straightforward, step-by-step process for identifying and resolving performance gaps, strengthening accountability, eliminating inconsistency, and reducing resentment. On the third day, we will review and connect all three sessions, and deliver the support materials you need to effectively and efficiently integrate all of the training content and be a catalyst of change within yourself, your clients, and the families, organizations and other entities and groups with whom you work.

Throughout the program, The Heritage Institute will tie the concepts from these specialists together into a comprehensive program.

Each of these sessions will finish at 5:00 pm, so plan your flights accordingly. We will not be able to accommodate you if you leave early on the last day (and you will disrupt the group).

Upon completion of the sessions, you will receive the materials and deliverables described on the last page.



THE EXCEPTIONAL FACILITATOR'S TRAINING WITH DOUG CARTER

June 12-14, 2017

The Exceptional Facilitator's Training is meant for you.

The goal of this intensive Exceptional Facilitator's Training program is to have you be so comfortable with yourself and what you're doing that you can pick a topic out of a hat, spend 5 to 10 minutes (or less) organizing your thoughts and then conduct an interactive workshop that creates measurable changes in behavior for the participants.

We can't guarantee that you'll be able to do what we just described in every circumstance because no one can predict what might happen in the future. What we ARE saying is you'll have enough understanding of what you're doing to be able to conduct a behavior-changing, interactive workshop that produces positive results and you'll be able to conduct that workshop with minimal time to prepare. Yes that means you can pick a topic out of a hat and in less than 60 seconds take control of the group, identify a topic, generate relevancy, and conduct your training.

It's not a about the content.

We want you to continue to change people's lives simply by the way you guide them along the structure.

It seems that even experienced trainers and facilitators start with wanting to know what to say in order to accomplish a result. The words that are all about what to say actually become the last thing to know once you understand how to build your workshop based on an underlying structure. Content is on the surface of results.

There are three elements to being an exceptional facilitator (in order of importance):

1. YOU being ready to be the exceptional trainer/facilitator;
2. You mastering the concepts and methodology of an exceptional trainer/facilitator; and
3. The content of the facilitation or training

This facilitator training goes beyond words. The first 2 days are about learning and practicing the underlying structure that quickly produces predictable measurable results. The 3rd day is learning and practicing the concepts, skills and tools to help



your clients (families, businesses, non-profits, etc.,) identify and resolve relationship issues that are hindering their optimal effectiveness.

This is what you get:

- A 4-step process that puts your participants at ease so they willingly participate.
- How to make any subject relevant to your participants.
- The 6 comments that drive a conversation down your desired path.
- Ways to makes what you say more believable and increases your credibility.
- An age old method to increase participation.
- What to do at the beginning of the meeting that enhances participation later in the session.
- The one thing that has to happen to keep their trust.
- An underlying structure that tells you what to do next.
- How to do positive, interruptive coaching by stopping a conversation or action and putting that person back on track without damage or upset.
- A powerful 2-step process that makes your participants recognize the value of what you're doing even if they don't like it.
- How to end a session with the participants wanting more.
- How to identify and resolve conflict amongst participants.

You probably already know some of this. You've been there. You've seen it. You handled it. You're trained. You have a skill set that has most probably been tested and has grown by experience. You trust your intuition whether you call it following hunches or trusting your gut or whatever you call it. You've gotten the job done...and you want more. This training will give you the skills, content, practice and confidence to facilitate nearly any meeting with most content.



“3-GAPS” AND FRANKLIN REALTY THEORY TRAINING AND DEVELOPING SPECIFIC FAMILY MEETINGS

August 9-10, 2017

Richard Godfrey will facilitate the morning session on March 2nd based on the bestselling book, *The 3 Gaps—Are You Making a Difference* that he co-authored with Hyrum Smith. As you may know, Hyrum Smith is the creator of the Franklin Planners and founder of the Franklin Quest company that later became Franklin Covey. Hyrum is also one of the “discoverers” of the Franklin Realty Theory that essentially states that we all have human needs and have all developed a series of principles/beliefs by which we operate. These principles/beliefs lead to rules that create predictable and automatic behaviors. And, our behaviors lead to results. If the results of your behavior do not meet your needs, you have an incorrect principle or belief.

Over the years, Richard and Hyrum determined the 3 Gaps that most often lead to results that do not meet our needs. These gaps are:

The Values Gap - learning how to do the things you value—that are central or core to who you are and what you want to accomplish in life.

The Beliefs Gap - everyone (individuals and organizations) needs to pay more attention to the effect your beliefs have on the results you’re getting. If you are failing to get the results you need, you need to understand there’s a gap between what you believe and what you need. Closing that gap—between what you currently believe and the beliefs that will meet your needs – is essential to success.

The Time Gap - (the events that make up your day) and the effort to plan for that day directly impacts your productivity. Too many people are busy without being productive because there is a gap between their goals and how they’re investing their time.

This part of Session 2 will focus on the Franklin Realty Theory, the 3-Gaps, and what changes when we close the 3-Gaps. During the session, you will learn how to better live your values, challenge your beliefs, create plans that are clearly linked to your individual and organizational success, and how to facilitate others to do the same. As a result, you and your clients will be happier, have more energy to put into positive goals, and be more productive.



The key messages that will come from this session are:

- Everyone has a basic desire to make a positive difference at home and at work.
- Increased engagement and reduced friction result when individuals close the gaps in their lives.
- There is an important link between motivation and individual values, beliefs and goals.

During the afternoon of March 2nd and all of March 3rd, Rod Zeeb from The Heritage Institute will connect and combine the materials from Doug Carter and this session and develop models for providing these concepts to your clients and others. As we all know, our ultimate goal is to help the family become a multi-generational high performance team.

Rod will accomplish that by reviewing the creation of creating two meetings for groups that will implement what you have learned:

- ***From Friction to Traction***, and
- ***The <insert family or group name> Traction Day***

By the end of this session, you will have actually applied what you learned in the first two sessions, and be ready to implement the concepts immediately.



CRUCIAL ACCOUNTABILITY TRAINING, CONNECTING THE DOTS BETWEEN ALL THREE SESSIONS AND SUPPORT MATERIALS

October 18-20, 2017

The first two days of training for this session will be facilitated by Greg Stephens who is a Master Trainer for Vital Smarts and is based on the *Crucial Accountability* book. It is designed to help you improve accountability, execution and performance for yourself, your clients, and the families, organizations and other groups you serve.

A group with a culture of weak accountability is one where those who see problems say nothing because they assume they don't have authority or skills to raise a concern. Their portion of this session will teach a straightforward, step-by-step process for identifying and resolving performance gaps, strengthening accountability, eliminating inconsistency, and reducing resentment. It uses video, group discussions, skill practice, and real-life application, so it will be both entertaining and engaging.

This training will provide a methodology for effectively holding others accountable that is based on more than 25 years of research. The key points are:

- **Hold anyone accountable:** no matter the person's power, position or temperament.
- **Master performance discussions:** to get positive results and maintain good relationships.
- **Motivate others without using power:** clearly and concisely explain specific, natural consequences, and permanently resolve problems.
- **Manage projects without taking over:** creatively help others avoid excuses, keep projects on track, and resolve performance barriers.
- **Move to action:** agree on a plan, follow-up, engage in good report practices, and manage new expectations.

The Heritage Institute will spend March 29th and reviewing all three sessions, and delivering the support materials you need to effectively and efficiently integrate all of the training content and be a catalyst of change within the families, organizations and other entities and groups with whom you work.



Upon completion of the program, you will receive the following materials:

- The ***Building Resilient Generations*** program
- *From Friction to Traction*
- The <insert the name of the family or entity> *Traction Day*
- *Personal Friction to Traction Day*

Enrollment in this program is limited to 15 participants on a first come, first served basis. The investment for this program and the follow-up materials is as follows:

For Heritage Design Professionals™ in good standing:

- \$16,220.50 if your registration and initial payment are received on or before March 10, 2016;
- \$16,720.50 if your registration and initial payment are received on or before May 10, 2016;
- \$17,720.50 if your registration and payment is received after May 10, 2017.

For all others:

- \$17,220.50 if your registration and initial payment are received on or before March 10, 2017;
- \$17,720.50 if your registration and initial payment are received on or before May 10, 2017; and
- \$18,720.50 if your registration and payment are received after May 10, 2017.

See the application for installment payment options.