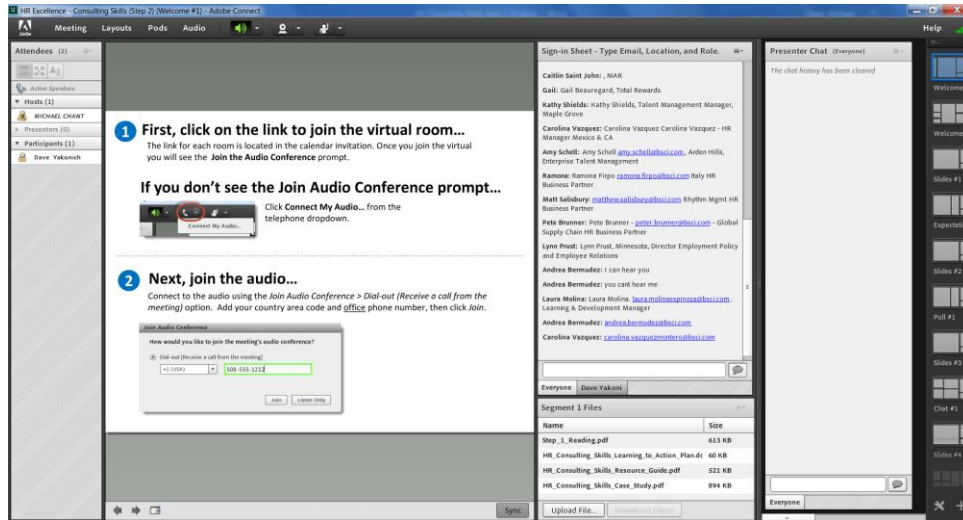


Layout Welcome #1 | Slide 1



Layout Welcome #1 | Slide 1 | **Producer**

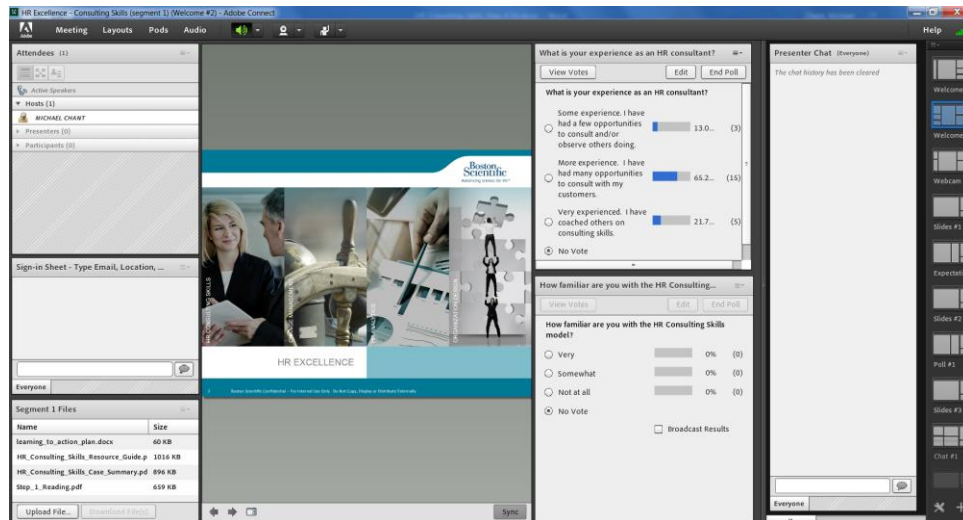
Producer: to welcome participants into the room. Remind them to have their Step 1 Reading, Resource Guide, Case Study and Learning to Action Plan printed out and in front of them. If they don't have them, they can download them from the file pod in the bottom right hand corner of the screen.

Ask them to:

- Sign in the sign-sheet and
- Follow the directions on the slide to integrate their audio.

Manually merge numbers for those participants who are having trouble.

Layout Welcome #2 | Slide 2



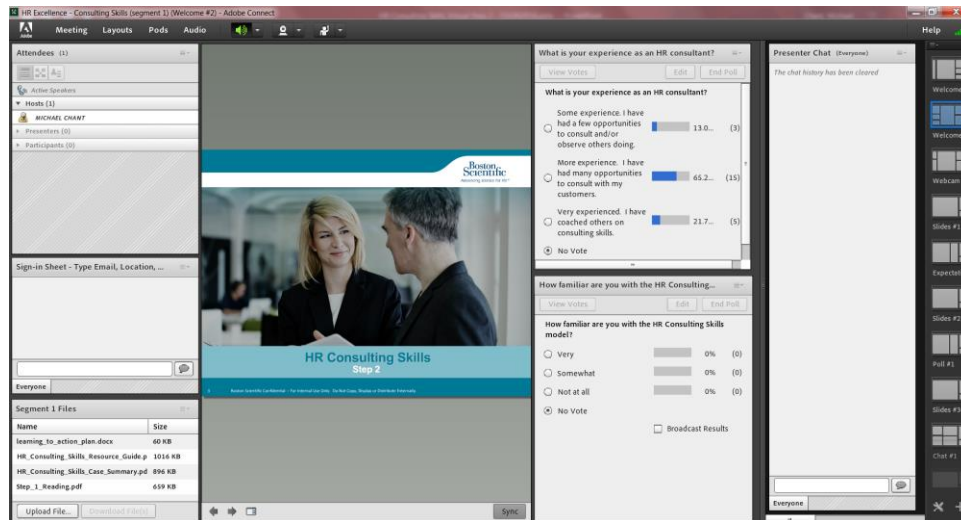
Layout Welcome #2 | Slide 2 | **Producer**

Advance to Layout Welcome #2

Say: This program is part of a larger initiative created to support the development of HR employees across BSC.

Ask: participants to answer the two polling questions on their experience as HR consultants and with using the HR Consulting Skills Model.

Layout Welcome #2 | Slide 3



Layout Welcome #2 | Slide 3 | Producer

Facilitator Debrief: Poll & Chat

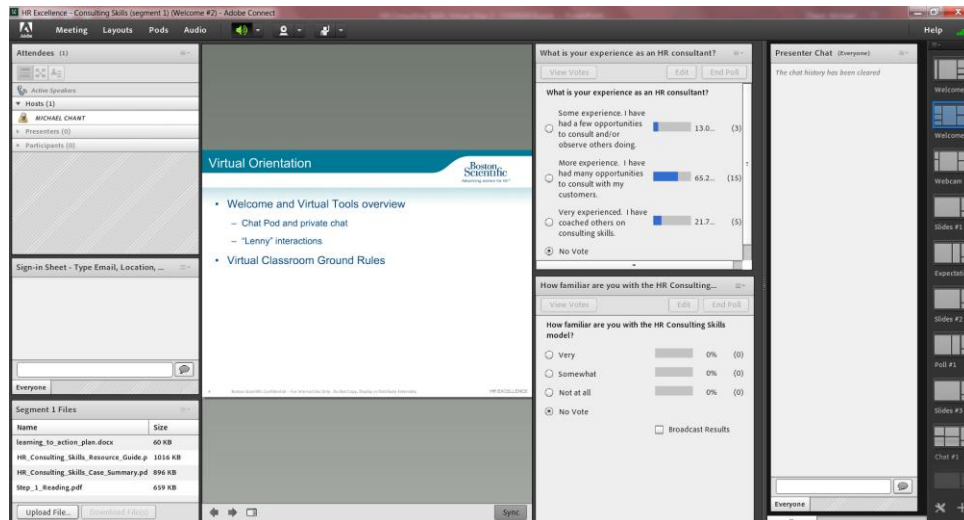
FACILITATOR REMINDERS:

- Be prepared to share examples of how you have used each of these tools
- Emphasize that although we are using these tools for a specific initiative, these tools can and should be used regularly in your individual jobs as needed

Time for this slide: 15 minutes

Elapsed time as of the end of this slide: 15 minutes

Layout Welcome #2 | Slide 4

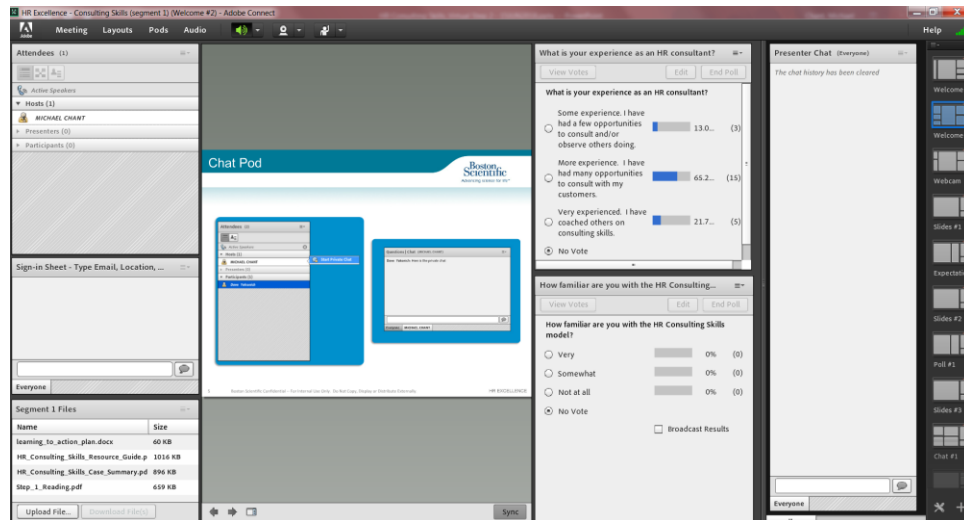


Layout Welcome #2 | Slide 4 | **Producer**

Say: Before I introduce our instructors, I would like to provide a brief orientation to the platform we are using today, Connect Pro.

Review: Items to be covered.

Layout Welcome #2 | Slide 5

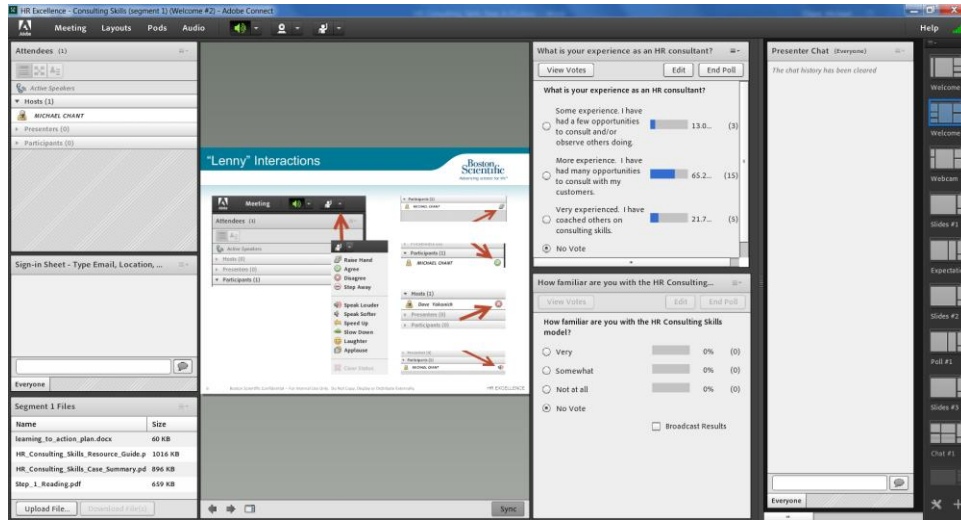


Layout Welcome #2 | Slide 5 | **Producer**

Say: We will be using chat pods to communicate with each other throughout this course. You already used a Chat Pod by typing into our sign in sheet. We try to, at a minimum, to have a “questions & comments” chat pod on each layout in case you have any questions or technical issues.

In addition, you have the option of private chat. You can start a private chat by hovering over the person’s name in the attendee list and selecting “Start Private Chat”. We encourage you to provide questions and comments for all other participants to view, but if you do need to you can send our instructor(s) or I a private message.

Layout Welcome #2 | Slide 6



Layout Welcome #2 | Slide 6 | **Producer**

Say: We would like to introduce you to our friend Lenny. He is a way for you to change your status at any time. Please notice that I am selecting the **Raise Hand, Agree, Disagree, and Speak Louder** as an example.

Ask: Please raise your hand if you are looking forward to the next two days of training.

Say: You can lower your hand or clear your status by clicking **Clear Status** from the drop down. Please **Clear Status** now.

Ask: **Agree** or **Disagree** if you completed Step 1 – which was your pre-work for today's virtual session.

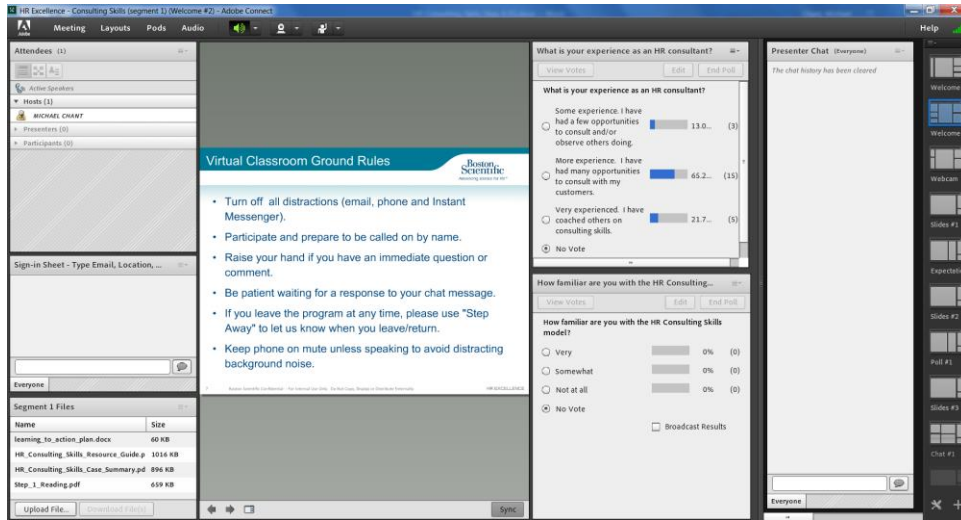
Say: Please **Clear Status** now.

Say: Select the **Agree** to show me you are ready to move on.

Clear all status

Elapsed time as of the end of this slide: 20 minutes

Layout Welcome #2 | Slide 7



Layout Welcome #2 | Slide 7 | **Producer**

Read: ground rules

Say: Give me an **Agree** if you understand the ground rules and would like to move on. **Raise your hand** if you have any questions or want clarification.

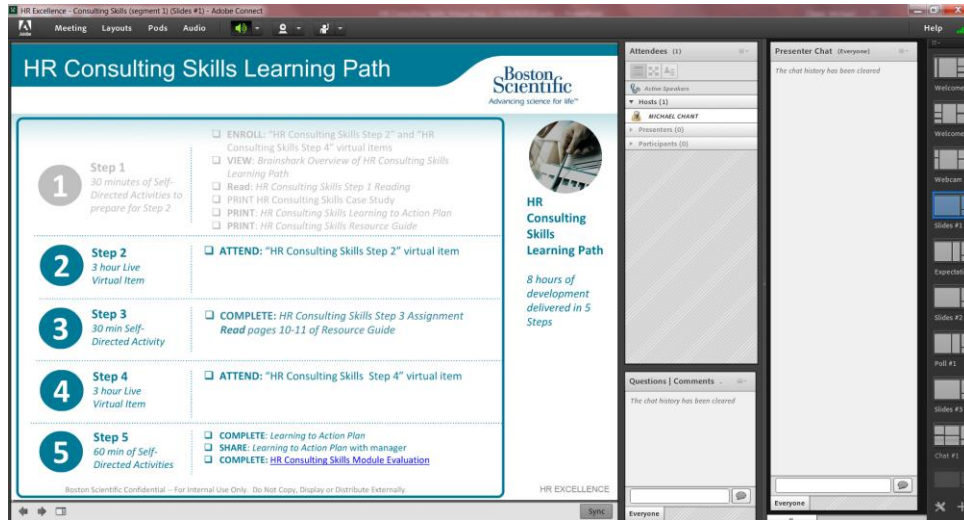
Facilitators: Introduce themselves.

- Name
- Location
- Time with BSC
- Role and time in that role

After introductions one facilitator will make a few observations about the sign in, for example, variety in

- Geographies
- Roles
- Length of time in roles
- And reference results of poll*

Layout Slides #1 | Slide 8



Layout Slides #1 | Slide 8 | **Facilitator(s) take over here**

Advance to Layout Slides #1

Say: This graphic represents the 5 Steps that make up the HR Consulting Skills learning path. This path was designed to support you in applying your learning back on the job. You have already completed **Step 1** which consisted of:

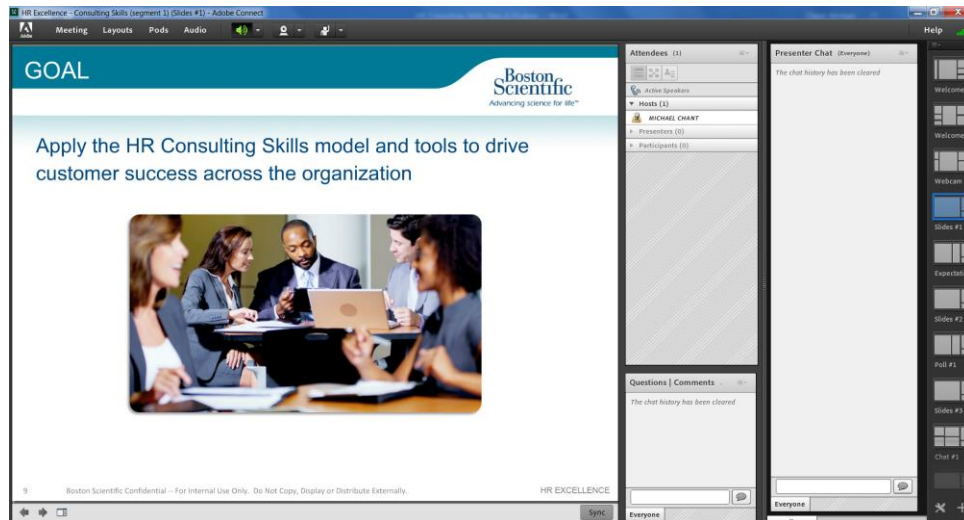
- Listening to a Brainspark overview about this module and the learning path
- Printing out all your course materials, and
- Completing your Step 1 Reading

We are now in **Step 2** – which is today’s virtual session

Prior to tomorrow’s session, we’d like to ask you to completed **Step 3** which consists of reviewing two pages in your Resource Guide – Pages 9 & 10. Tomorrow’s virtual session is **Step 4**.

Lastly, **Step 5** is your opportunity to ensure that you transfer what you have learned back to your day-to-day work. To do this, we ask that you complete your *Learning to Action Plan* (which we will describe to your shortly), and meet with your manager to gain their alignment and commitment to your development in this area.

Layout Slides #1 | Slide 9

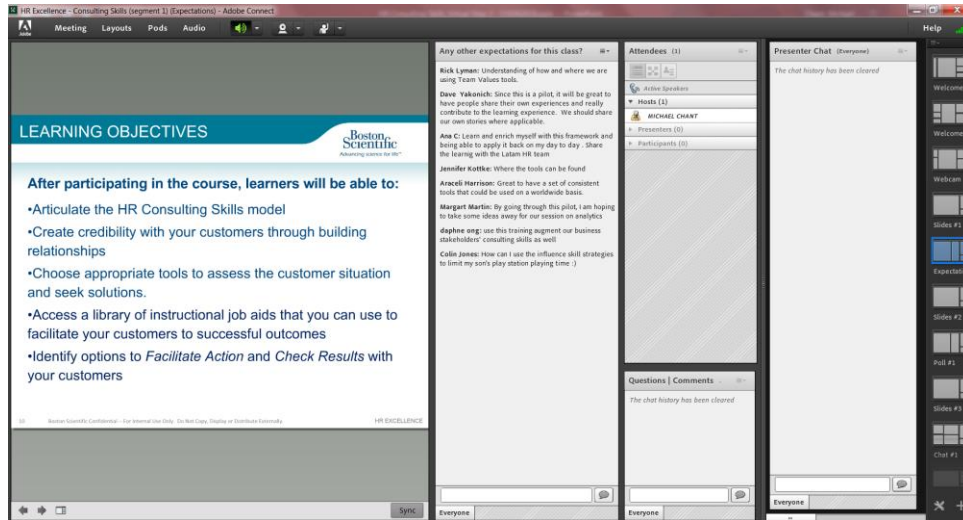


Layout Slides #1 | Slide 9 |

Say: The goal for our sessions today and tomorrow is to *Apply the HR Consulting Skills model and tools to drive customer success across the organization. This applies to HRBPs as well as HR COE members.*

This course is focused on the HR Consulting Skills Tools and Process. During the session we will also learn about and share behavioral examples and best practices

Layout Expectations | Slide 10



Layout Expectations | Slide 10 |

Advance to Layout Expectations

Review each objective on the slide

Say: We understand that “Consulting Skills” is a broad topic. We will do our best to cover our content. However, we realize that as individuals you may be coming to this session with a variety of expectations.

Ask: Do you have any specific expectations for this course that you would like to share or ask about? If yes, please let us know in the chat pod.

Debrief Chats

Depending on participants chats, you might want to say:

- Please know that some of the other HR Excellence modules are covering some complementary content that maybe relevant to your request
- Please be sure to check the myBSC Intranet Programs and Resources page for more ideas and options related to your further development.

Elapsed time as of the end of this slide: 35 minutes

Layout Slides #2 | Slide 11

The screenshot shows a presentation slide titled "Agenda" for "Step 2" and "Step 4" of a consulting framework. The slide is displayed in a meeting software interface with sidebars for attendees and chat.

Agenda

Step 2

- Introduce the Consulting Framework
- Develop Relationships
 - Contracting
 - Influencing Strategies
- Assess Situation:
 - Workplace Assessment Tool
 - SCOOP

Step 4

- Seek Solutions
 - Leader Assimilation
 - Team Values Exercise
 - SWOT Analysis
 - 5 Whys
 - Impact/Effort Grid
 - Brainstorming
 - Decision Making Tools

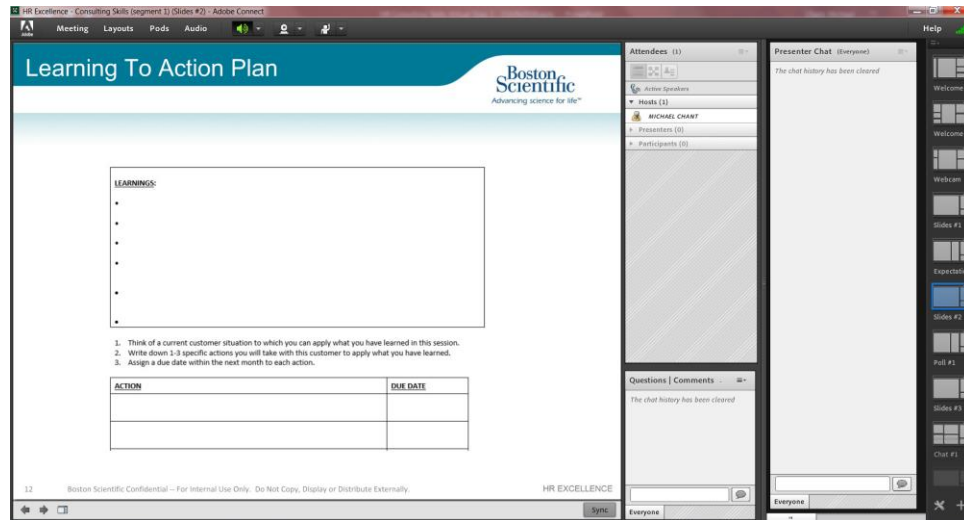
The diagram illustrates a process flow: "Develop Relationships" (How can I provide value?) leads to "Assess Situation" (What is going on?), which leads to "Seek Solutions" (What needs to happen?). This leads to "Facilitate Action" (How do we do it?), which leads to "Check Results" (What is the impact?). The process is framed by "RELATIONSHIPS" at the top and "RESULTS" at the bottom.

Layout Slides #2 | Slide 11 |

Advance to Layout Slides #2

Review the agenda for today. Let the participants know what they can look forward to tomorrow.

Layout Slides #2 | Slide 12



Layout Slides #2 | Slide 12 |

Say:

- Please keep a copy of your Learning to Action plan available to write down what you are learning. Note what you would like to learn more about, or implement with your customers.
- At the end of the session, you will work with your notes to develop an action plan that you will implement within the next 30 days
- Please give me a green check to confirm that you have your Learning to Action plan in front of you.

Transition: Now that we know who is here, where we are going, and how we will get there, it's time to begin our exploration of the consulting skills framework and tools.

Layout Slides #2 | Slide 13



Layout Slides #2 | Slide 13 |

Say:

- Let's dive into the HR Consulting skills Framework. We introduced this model to you in your Step 1 Reading.
- The HR Consultant is a business partner who needs to balance results and relationships
- As the right-hand person focused on people issues, you are at the table, providing knowledge about how people issues impact business structure, marketing impact, objectives of growth and business expansion.
- This framework is designed to help you enhance your ability to consult with and influence your customers in an effective way.
- There are 5 phases to consulting effectively: *(Facilitator may use green pointer to point to each stage as you review)*
 - **Develop Relationships:** We need to be able to build effective relationships with our customers – adding value that impacts people and the business
 - **Assess the Situation:** We articulate the desired outcome, gather information and identify root causes that could prove to be barriers.
 - **Seek Solutions:** Next, we recommend actions and use our influence to reach the desired outcomes together with our customers
 - **Facilitate Action:** Then we insure the appropriate interventions take place
 - **Check Results:** Lastly, we assess the impact and identify lessons learned. Our goal is to show tangible and quantifiable results (when possible) and to transfer the learning to the client group.

HR Excellence – Consulting Skills Facilitator Guide | Step 2

In the interest of time, we will primarily focus on the first three phases of the framework in this session: *Develop Relationships, Assess the Situation and Seeks Solutions*. *At the end of the day tomorrow, we will also give you an opportunity to briefly explore some of the tools that are part of the last 2 phases: Facilitate Action and Check Results for your future reference.*

This is a structured process to help BSC HR professionals to approach consulting in a consistent way across the organization.

As a member of HR, your customer will come to you with a myriad of issues. This HR Consulting Skills model represents a broad scope of types of activities you might participate in with your customers. Depending on the situation or customer, you may be jumping in at different points. For example, if you've already established a good relationship and understand the situation, you may begin your work with them in the *Seek Solutions* phase.

As we mentioned when reviewing your learning objectives, we will be introducing you to a collection of instructional job aids. Think of these as the tools in your tool belt that you can use to address all types of customer situations. For the purposes of this module, we will be walking you through the Consulting Framework from start to finish as you would need to do if you had a brand-new customer with a brand-new situation.

Please note that there is a reason that the steps are in this order. For example, it is critical with any new client to start by developing your relationship. And you never want to jump to seeking solutions or facilitating action before you have thoroughly assessed the situation.

Layout Poll #1 | Slide 13

The screenshot displays a web meeting interface with a slide on the left and a poll on the right. The slide, titled "CONSULTING FRAMEWORK" by Boston Scientific, features a diagram with two main arrows: "RELATIONSHIPS" pointing left and "RESULTS" pointing right. The "RELATIONSHIPS" arrow is divided into "Develop Relationships" (with sub-points "How can I provide value?" and "What's my role?") and "Assess Situation". The "RESULTS" arrow is divided into "Seek Solutions" (with sub-points "What needs to happen?" and "How do we do it?") and "Facilitate Action" (with sub-points "How do we do it?" and "What do we expect?"). Below the diagram is the text "Step 1 Reading". The poll, titled "Which of these steps has been most challenging for you?", lists five options: "Develop Relationships", "Assess the Situation", "Seek Solutions", "Facilitate Action", and "Check Results", each with a 0% progress bar. A "No Vote" option is also present. The interface includes an "Attendees" list with one participant, "MICHAEL CHART", and a "Presenter Chat" window.

Layout Poll #1 | Slide 13 |

Advance to Poll #1

Ask: Please complete the poll: “Based on your experience, which of these steps has been most challenging for you?”

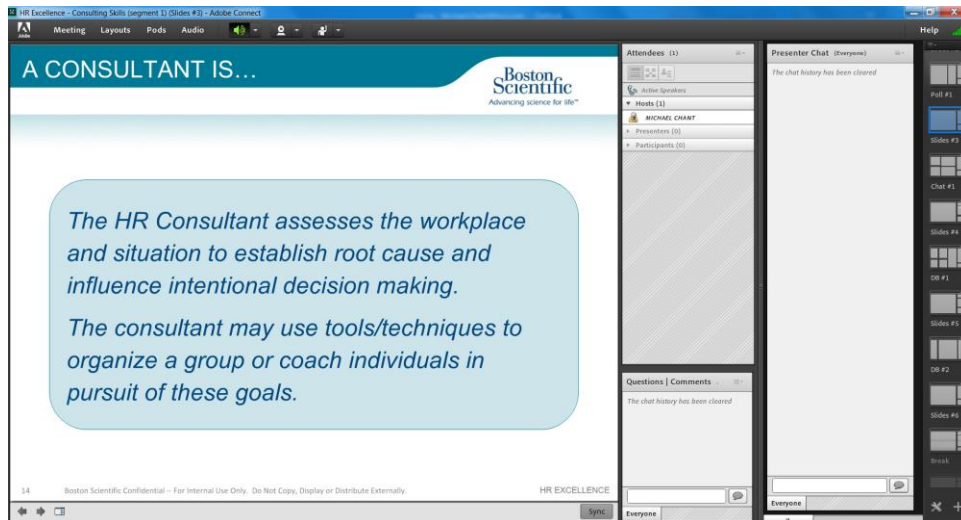
Debrief Poll. In response to the poll, reference when we will cover each of the sections. Feel free to call on participants for more information.

Say: Please give me a green check if you understand the phases and the sequence. If you have any questions or comments please raise your hand.

Time for this slide: 5 minutes

Elapsed time as of the end of this slide: 45 minutes

Layout Slides #3 | Slide 14



Layout Slides #3 | Slide 14 |

Advance to Layout Slides #3

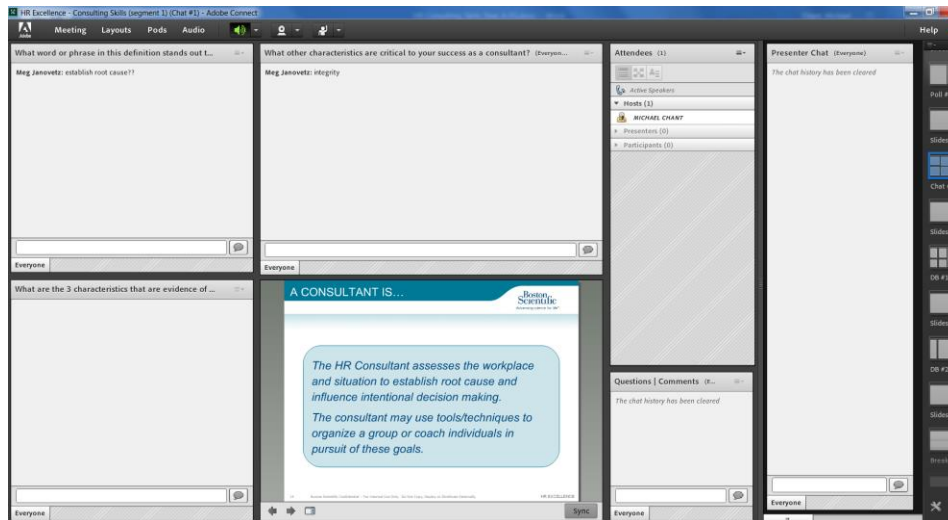
Say: Here we have our definition for the term “Consultant”.

A consultant influences and motivates others over whom they have no direct control or authority.

A consultant wins support and acceptance for proposed changes and ideas through careful consideration of:

- Stakeholders’ needs and interests,
- Strategic relationships, and
- Persuasive communications

Layout Chat #1 | Slide 14



Layout Chat #1 | Slide 14 |

Advance to Layout Chat #1

Ask: Please chat your answer to the following questions:

1. *What word or phrase in this definition stands out to you and why?*

Facilitator: Debrief Chat

2. *What are the 3 characteristics that are evidence of credibility? (Hint: These can be found in your Step 1 Reading) Answer: Vision / Honesty / Competence.*

Facilitator: Debrief Chat

3. *From your experience, what other characteristics can you think of that are critical to your success as a consultant?*

Debrief Chat

Transition: Being a successful HR Consultant requires that you be a credible partner with your customer. Let's talk some more about how we do that.

Layout Slides #4 | Slide 15

The screenshot shows a presentation slide titled "Develop Relationships" from Boston Scientific. The slide content includes a central diagram with a large blue arrow pointing right, labeled "Develop Relationships" and "How can I provide value?". Inside the arrow are four stages: "Assess Situation" (What is going on?), "Seek Solutions" (What needs to happen?), "Facilitate Action" (How do we do it?), and "Check Results" (What is the impact?). Above the arrow is a diamond labeled "RELATIONSHIPS" and below it is a diamond labeled "RESULTS". To the right of the diagram are two stacked boxes: "Contracting" and "Influencing". The slide is displayed in an Adobe Connect window with a sidebar showing a timer at 00:00:00, a list of attendees (MICHAEL CHART), and a presenter chat area.

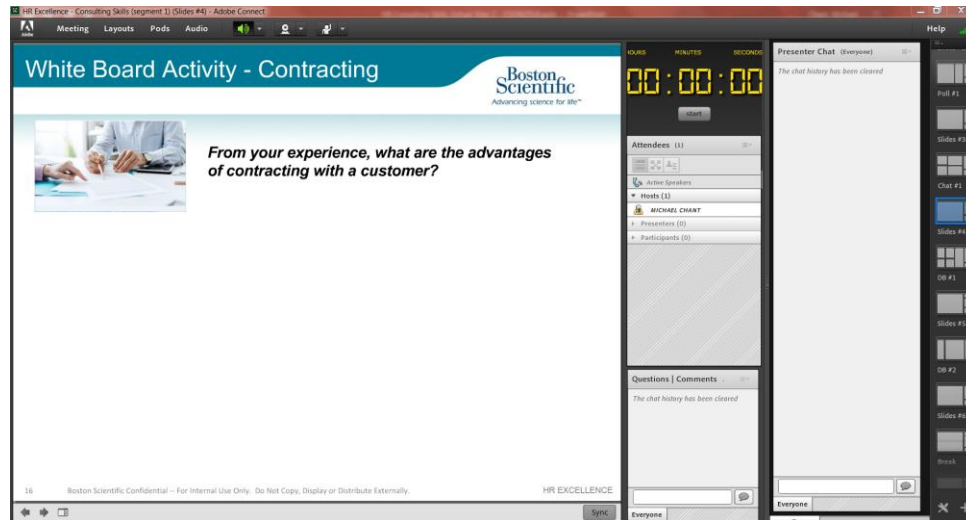
Layout Slides #4 | Slide 15 |

Advance to Layout Slides #4

Say: To do that, we will dive into the first phase of the HRCS Framework or Model. As a part of this first phase – Develop Relationships, we will:

- Discuss how to use the **Contracting Process** to set expectation and establish guidelines with customers
- Dive deeper into the **5 Influencing Strategies** that you read about in your Step 1 Reading. We will also ask you to share your ideas and experience so that we can learn from each other.

Layout Slides #4 | Slide 16



Layout Slides #4 | Slide 16 |

Say: Let's start our discussion of contracting with a question.
For this exercise, our Producer will be introducing you to the Text tool and you will be writing directly onto the slide.

Ask: *Here is the question we want you to answer on the slide: From your experience, what are the advantages of contracting with your customer?*

Say: You will have about 5 minutes to do this. Don't worry about getting your idea perfect, just share your thoughts with us.
Now our Producer will give you instructions on how to use the text tool.

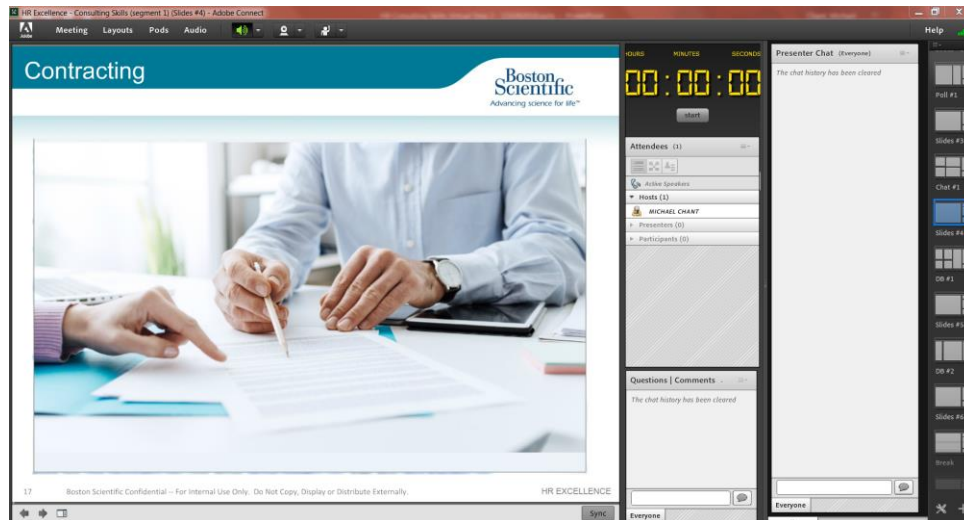
Producer: Give instructions on how to use Text Tool. **Start** timer for 5 minutes.

At the end of exercise:

Facilitator: Debrief the whiteboard and ask participants to elaborate or give examples as appropriate.

Time for this slide: 10 minutes
Elapsed time as of the end of this slide: 1 hour

Layout Slides #4 | Slide 17



Layout Slides #4 | Slide 17 |

Say: Now that we've introduced this topic of contracting, let's talk a bit more about it. Contracting is about *establishing roles*, *setting boundaries* and *defining outcomes*. Now I'll ask our Producer to type these 3 key themes on the slide for emphasis.

PRODUCER: At this point, pull up the text tool and type:

Establishing Roles

Setting Boundaries

Defining Outcomes

Directly on the slide, then turn back over to Facilitator

HR Excellence – Consulting Skills Facilitator Guide | Step 2

Say: Seasoned HR professionals know that while they want to be customer focused, they can't be all things to all people. Contracting is a positive and professional way to communicate this. It enables you to show that you're invested in helping leaders run their business and accomplish their objectives without taking on additional unnecessary tasks or responsibilities.

Here is some sample language that I might use in a contracting conversation: "My role is "x" (*HRBP, Total Rewards, Talent Development, Talent Acquisition*) and here is what I generally focus on (*Here you would describe how you can help them*). In contrast, the role I need YOU as the leader to play is "y" (*for example: Set the team's objectives, Share the Vision, Communicate your expectations etc.*)

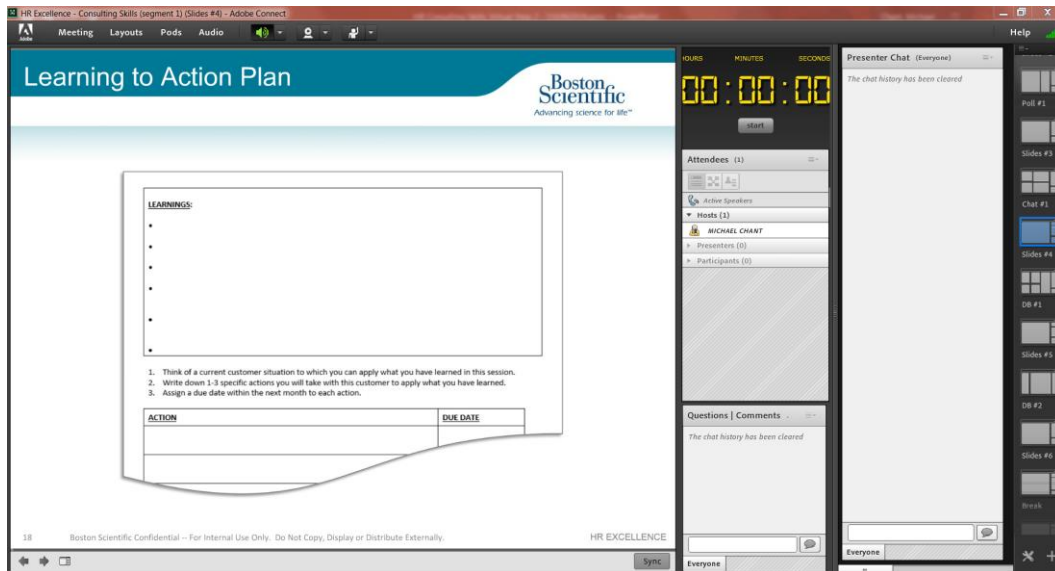
For example, let's say that there is an organizational change that I am contemplating with a leader. As the Business Partner, I could offer the leader an opportunity to brainstorm options to bring back to the team. After that, I could help them to craft their message to the team or other stakeholders. Additionally, I would help the leader to get really clear on the drivers for the change in organizational strategy and to articulate the ideal end state.

As you can see, while you are having this contracting conversation, you are describing your own role as well as how your role works with the client. You've also inherently put some boundaries in place about where you do the work and where they do the work. Lastly, you've helped to define the desired outcome.

Ask: What questions do you have about contracting?

Say: Please chat or raise your hand to let us know.

Layout Slides #4 | Slide 18



Layout Slides #4 | Slide 18 |

Say: Please pull out your Learning to Action plan. Thinking about your current scope of responsibilities. Is there a customer with whom you would benefit from having a contracting conversation?

If so, go ahead and make any notes related to this in your Learning to Action plan. Give me a green check when you are ready to move on

Elapsed time as of the end of this slide: 1 hour 5 minutes

Layout Slides #4 | Slide 19

The screenshot shows a presentation slide titled "Develop Relationships" from Boston Scientific. The slide content includes a central diagram with a large blue arrow pointing right, labeled "Develop Relationships" and "How can I provide value?". Inside the arrow are four stages: "Assess Situation", "Seek Solutions", "Facilitate Action", and "Check Results". Below the arrow are two boxes labeled "Contracting" and "Influencing". The diagram is framed by a diamond shape labeled "RELATIONSHIPS" at the top and "RESULTS" at the bottom. The slide is displayed in a meeting software interface with a sidebar showing attendees, a timer, and a chat window.

Layout Slides #4 | Slide 19 |

Say: Now let's continue to explore the Develop Relationship phase by diving deeper into the topic of Influencing.

Layout Slides #4 | Slide 20



Layout Slides #4 | Slide 20 |

Say: In HR at BSC we work in an environment where we are constantly looking to add value and make lasting change with our client groups. One way to ensure that we are effective Consultants, is to be able to identify and use different strategies to influence our stakeholders depending on the situation.

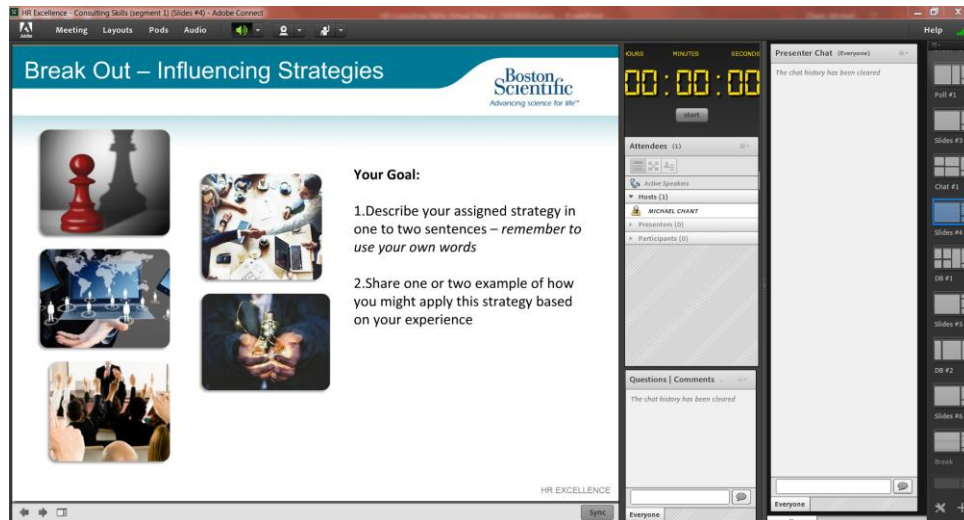
In the Step 1 Reading you reviewed five strategies to influence others effectively and found out how these might assist you in your work as an HR Consultant.

These 5 Strategies are:

- Empowerment
- Interpersonal Awareness
- Relationship Building
- Organizational Awareness
- Logical Persuasion

Transition: Next we are going to work in groups to share and to apply what we learned about influencing in the Step 1 Reading

Layout Slides #4 | Slide 21



Layout Slides #4 | Slide 21 |

Say: You will each be assigned to one of 5 breakout groups – 1 group for each of the 5 Influencing Strategies. The desired outcome of this exercise is for each group to share:

- A one to two sentence description of the strategy *in your own words*
- One or two examples of how you might use or apply this strategy based on your experience
- You will have about 10 minutes to complete this. Our Producer will give you instructions on the going into the breakout rooms.

PRODUCER GIVE BREAK OUT INSTRUCTIONS:

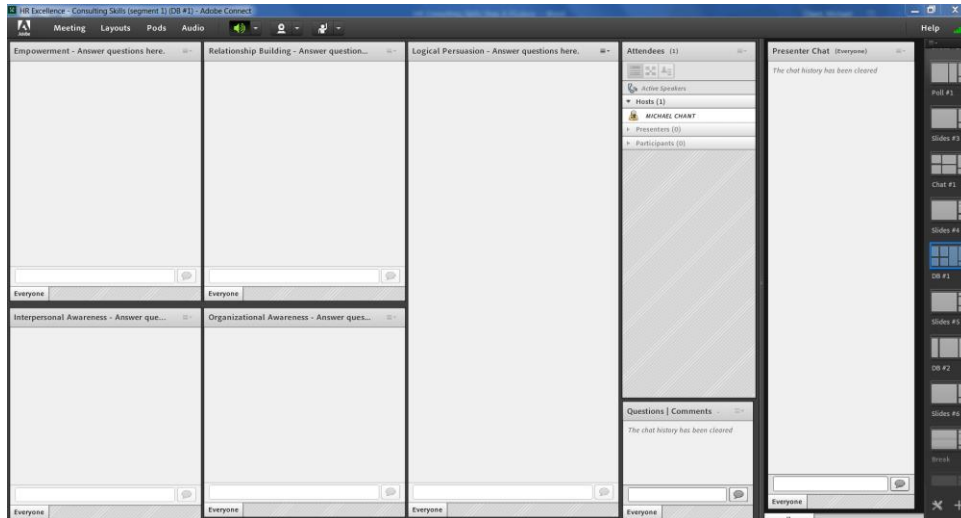
- You will be connected by audio; you will only hear those in your group.
- Start by assigning a scribe (who will type your responses into the chat pod) and presenter to share your findings when we return to our large group.
- Describe the strategy in one to two sentences – remember to use your own words.
- Capture one or two examples of how you might use or apply the strategy based on your experience.
- Give me an Agree if you understand the instructions or a Red X if you have a question.

Producer start timer for 10 minutes. Start breakouts (breakout rooms 1-5).

PRODUCER AFTER BREAK OUT.

Advance to Layout DB #1

Layout DB #1 | Slide 21



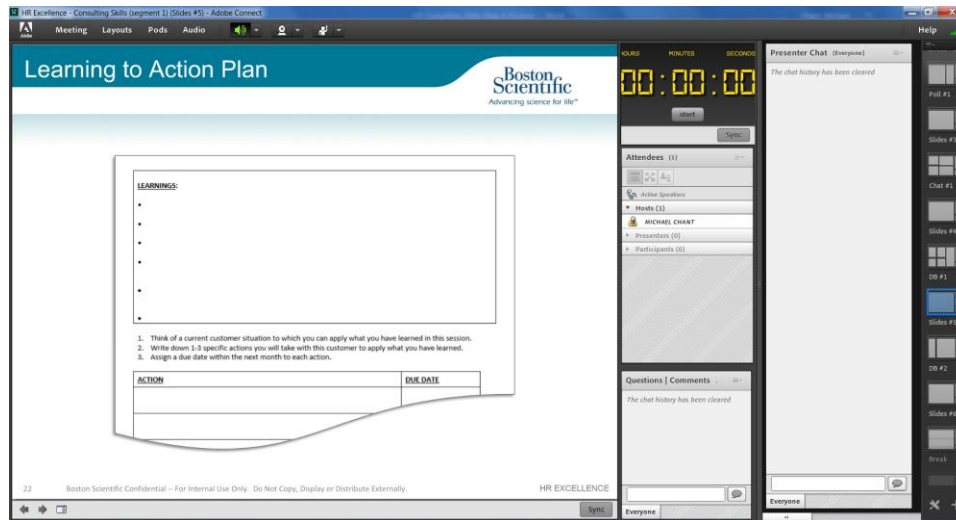
Layout DB #1 | Slide 21 |

Facilitator: Ask each group to share. Add anything you want to be sure is covered.

Time for this slide: 15 minutes

Elapsed time as of the end of this slide: 1 hour 20 minutes

Layout Slides #5 | Slide 22



Layout Slides #5 | Slide 22 |

Advance to Layout Slides #5

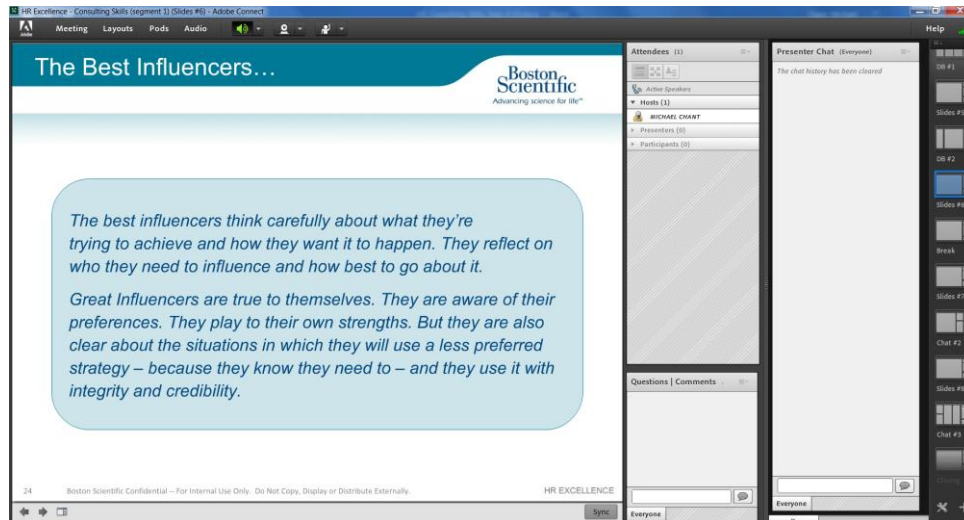
Say: Please pull out your Learning to Action Plan:

- Identify a customer with whom you'd like to be more influential
- List in your Learning to Action Plan any ideas/strategies that you think might help you with this customer

Please give me a green check when you have done this.

Say: If you want to get some additional practice in this area of influencing, we recommend that you share this part of your Learning to Action Plan with a colleague and ask for their feedback and recommendations around your influencing strategy.

Layout Slides #5 | Slide 23



Layout Slides #5 | Slide 23 |

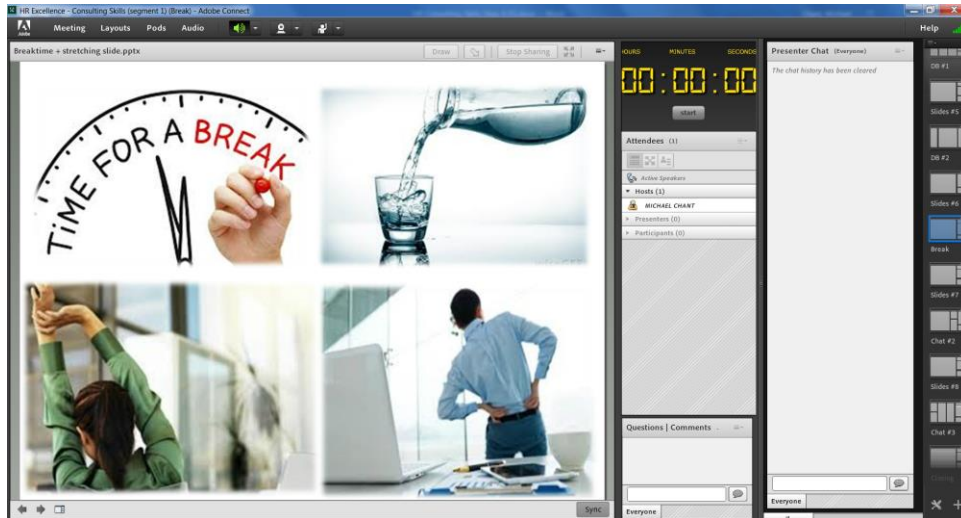
Say: Here are some thoughts about what makes a great influencer
In summary,

- Think carefully about what you are trying to achieve,
- know yourself,
- play to your strengths, and
- act with integrity and credibility.

Elapsed time as of the end of this slide: 1 hour 30 minutes

Say: Our producer will now take us into the break.

Layout Break | Slide 24



Layout Break | Slide 24 |

Advance to Layout Break

Producer: takes the group into break and lets them know when to be back. Ask them to put the 'Step Away' on and take it off when they return from break. **Start:** timer for appropriate time.

Suggested Time for break = 10 minutes

Elapsed time as of the end of this slide: 1 hour 45 minutes

Layout Slides #6 | Slide 25

The screenshot shows a presentation slide titled "Assess Situation" from Boston Scientific. The slide content includes a large arrow diagram with "Assess Situation" highlighted in blue. The diagram is divided into "RELATIONSHIPS" and "RESULTS" sections. The "Assess Situation" phase is associated with the question "What is going on?". Below the diagram, there are boxes for "Workplace Assessment" and "SCOOP". The slide is displayed in a meeting software interface with a sidebar showing attendees and a chat window.

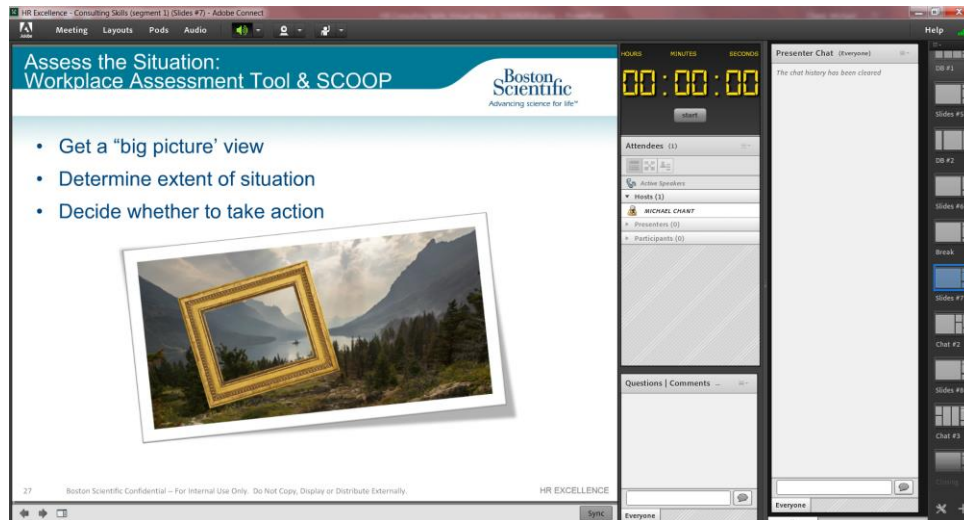
Layout Slides #6 | Slide 25 |

Advance to Layout Slides #6

Say:

- We are now in the second phase of the framework - **Assess situation**
- In this phase we answer the question – *What is going on?*
- The tools in this phase of the Model help us to understand what preliminary questions to ask to determine how you can help and whether you are the most appropriate person to provide assistance.

Layout Slides #6 | Slide 26



Layout Slides #6 | Slide 26 |

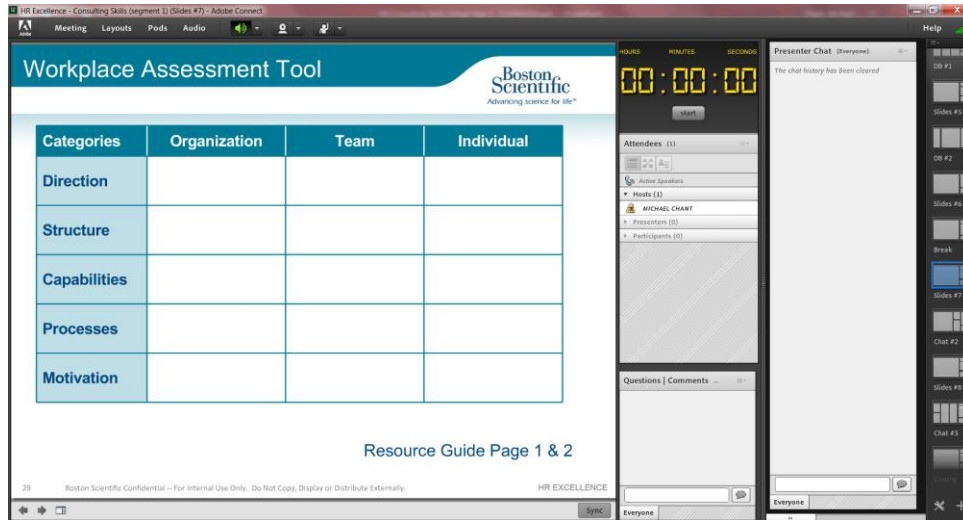
Say: We use these tools to:

- Get a “big picture” view
- Determine extent of situation
- Decide whether to act

The **Workplace Assessment Tool** is a great tool for assessing the entire landscape or the big picture relative to the leader, the team and the individual.

SCOOP is a great tool for gaining a little more specificity, or more of a “situation focus”. So, if you look at the picture, the SCOOP tool is better for dealing with the mountains or the valley and what is going on within those individual elements of the bigger picture. I think of SCOOP as ideal for a specific situation within a function, department or group.

Layout Slides #6 | Slide 27



Layout Slides #6 | Slide 27 |

Say: Now, let's get back to looking at our Tools – The first tool we will look at is the Workplace Assessment Tool

It is located on page 1 & 2 of your Resource Guide. This is a rich and very versatile tool that you can use in a variety of situations from very broad to narrower. It provides you with critical, probing questions that you can use to investigate and gain a thorough understanding of a situation.

The three areas of scope/focus for this tool are laid out in the columns. These are:

Organization / Team / Individual

There are five rows that can apply to each of these areas. These are: **Direction / Structure / Capabilities / Processes / Motivation**

I'd like to give you a few minutes to review this tool. In the interest of time, I recommend that you look at the first two rows only now - **Direction and Structure**. Please review the questions in those row as the relate to all three columns - **Organization / Team / Individual**. After that I will talk through an example of how I have used this tool.

Please give me a green check when you are done reviewing the first 2 rows in your Resource Guide on pages 1 & 2.

The Workplace Assessment tool is basically a needs assessment tool which helps define and organize your understanding of the current situation. Let's consider a time when any of us had a brand-new customer group either as a BP or as a COE specialist.

For example, I can think of a time when I had a new client group early in my career. The key questions I had to get answers to quickly were about:

Direction – Organization: Questions I like to ask: Is it formal/informal? Is there a vision that is really “walk the talk” or is it just stated words without any real meaning to the employees? In this instance the vision did not really describe the employee’s beliefs or actions. The situation was dysfunctional.

Direction – Team: Does the team understand where it’s headed with clear direction? Does it have shared accountability?

I’m sure we have all had client groups where that sense of truly shared accountability is strong, and others where it just isn’t.

In an extreme example from many years ago, I can think of a situation where there was accountability to a leader out of fear. But it was only out of fear which is not a long-term motivator because people run out of energy, or they leave. However, the accountability was very strong to the team of peers probably out of sheer tenacity and survival mode. So, although the situation was not ideal, there was still very clear accountability and performance

Direction – Individual: Does the individual understand his/her role in the team? and do they have clear direction for their top 2-3 objectives?

In many ways, in my example, individuals were clear on their role in the team

After assessing **Direction**, you then move on to **Structure**

Does the *Organization* have a structure that makes sense for what it’s top 2-3 objective are?

Does the *Team*?

Does the *Individual*

Then you explore other categories.

Does the organization have the needed **Capabilities**? If not, will the organization BUY or BUILD these capabilities. We often must assess this in the Strategic Plan so that we can feed that information cumulatively to our partners in TA and Talent Development as an output of all the Strategic Plans.

For example, in **Processes** - Do the **Processes** make sense for this *Team*? Is there a clear sense of what this team does for the organization?

I often ask about scope here. Is the scope of the work of your function understood here?

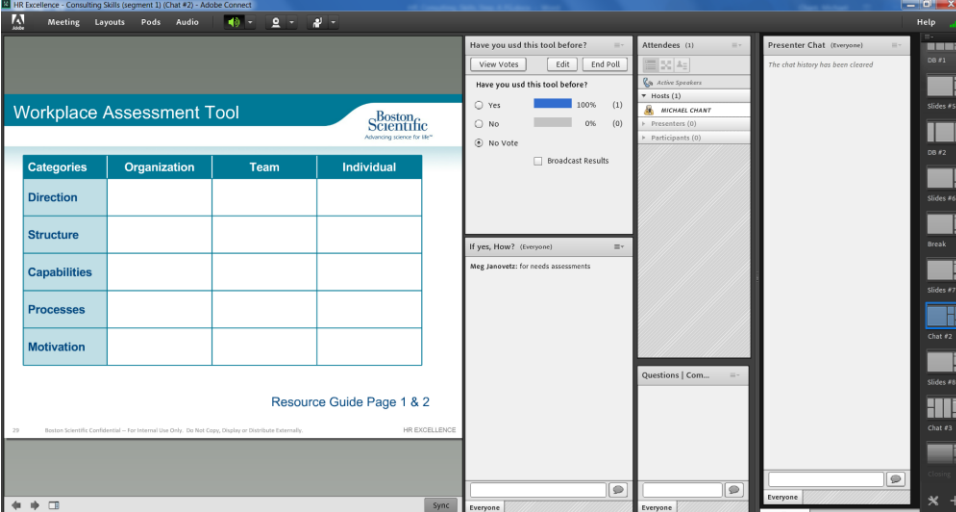
Also, are there clear owners of various processes?

And finally, **Motivation:**

There are many motivators in teams and the example I used earlier was fear. Of course, a more positive/sustainable motivator would be real affiliation to the mission of the company. Team connectivity and collaboration can also be big motivators. There is a myriad of examples for motivation.

Advance to Layout Chat #2

Layout Chat #2 | Slide 27



The screenshot displays a meeting interface with three main panels. The left panel shows a 'Workplace Assessment Tool' with a table and a 'Resource Guide Page 1 & 2' link. The middle panel features a poll titled 'Have you used this tool before?' with a progress bar showing 100% 'Yes' votes. The right panel includes an 'Attendees' list with 'MICHAEL CHARY' as the presenter and a 'Presenter Chat' pod.

Categories	Organization	Team	Individual
Direction			
Structure			
Capabilities			
Processes			
Motivation			

Layout Chat #2 | Slide 27 |

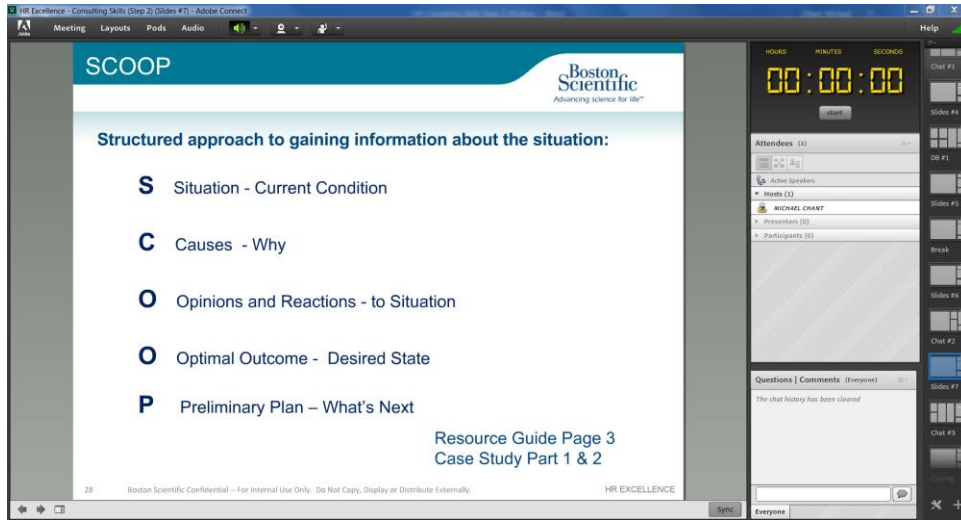
Ask: I'm curious how many of you are familiar with this tool?

- Please answer the polling question to let me know if you have used this tool before.
- If you have used it, please chat a brief description of how you used it in the chat pod.

Time for this slide: 15 minutes

Elapsed time as of the end of this slide: 2 hours

Layout Slides #7 | Slide 28



Layout Slides #7 | Slide 28 |

Advance to Layout Slides #7

Say: Let's look in at this **second** tool that you can use to Assess the Situation. Please go to page 3 of your Resource Guide and take a couple of minutes to review the SCOOP model. Give me a green check when you are done reviewing it.

Say: The SCOOP Model is a structured approach to gaining information so you can assess what is going on:

- **Situation** – current condition
- **Causes** -- why
- **Opinions and Reactions** – to situation
- **Optimal Outcome** – desired state
- **Preliminary Plan** – what's next

Let's talk about the SCOOP model and real-life examples of how it might get used. For example, I can think of a situation where I had a brand-new customer group.

As it relates to the SITUATION, it was early in my career and it was my first time supporting a Sales Force as a client group. I really wanted to do a good job.

The company was going through very challenging times and there were rumors of RIF everywhere.

So, I thought, well let's use the SCOOP model to assess this:

**HR Excellence – Consulting Skills
Facilitator Guide | Step 2**

The Situation: Sales are down, pricing has been falling and tough to maintain on rapidly commoditizing products like sutures and latex gloves.

What's the **Cause**: Rumors of RIF, fear, retention concerns, loss of productivity

Opinions: People start to mentally check out and look to other companies for jobs

Optimal Outcome: Stabilize and re-focus the workforce

Preliminary Plan: Focused communication with Sales Directors, clear next steps on how to get there

Now let's apply what we know about the SCOOP model to a Case Study:

We have added this case study in order to keep us focused on practical application of HR Consulting Skills tools. Going forward, we will be asking you to keep this case study in mind as we work through several of the tools we'll be learning about today and tomorrow. I want to be sure you know that this case study is being used as an example only. We do not expect you to have any prior experience with acquisitions in order to attend this course. The case is being provided only as a background to demonstrate the HR Consulting Skills tools. With that said, please review Part 1 and 2 of your Case Study document. There you will see information that we could have gained regarding the Zephyrus acquisition by using the SCOOP tool.

Please give me a green check when you are done.

At this point, the Facilitator reviews Part 2 of the Case Study and highlights a few points from each letter of the SCOOP Model:

Say:

Situation: *What currently happening?* - (highlight a few)

Causes: *What do you think is driving this?* – (highlight a few)

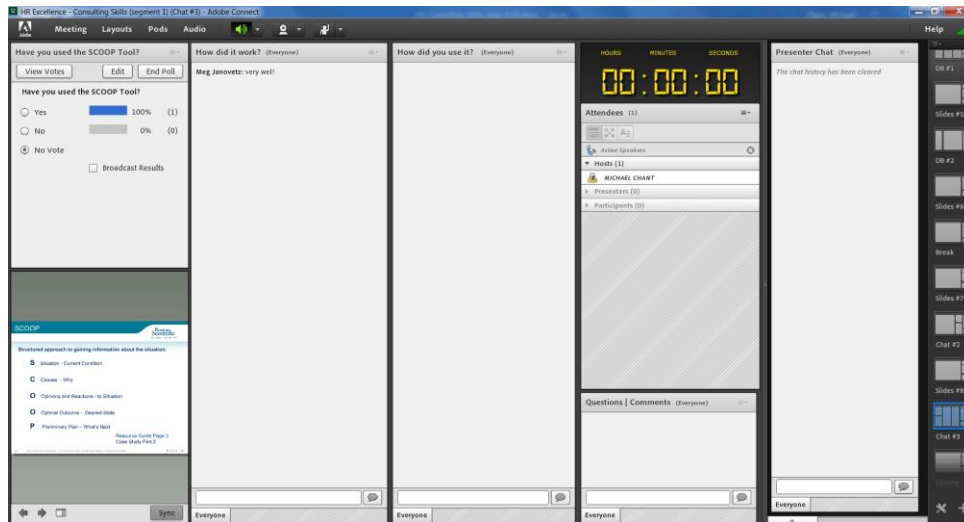
Opinions and Reactions – *How are people reacting?* – (highlight a few)

Optimal Outcome: *What would you like it to be?* – (highlight a few)

Preliminary Plan: *What are your initial thoughts on what to do?* – (highlight a few)

Advance to Layout Chat #3

Layout Chat #3 | Slide 28



Layout Chat #3 | Slide 28 |

Ask: Now I'd like to hear from you about your experience. Please chat your answers to the following questions:

Have you used SCOOP tool?

How did you use it?

How did it work?

Debrief Chat

Time for this slide: 10 minutes

Elapsed time as of the end of this slide: 2 hours and 10 minutes

Layout Closing | Slide 29

Individual Exercise – Assess Situation

Individually:

- Think of a customer *Situation* you'd like to further Assess
- Which tool would you use:
 - SCOOP**
 - or
 - Workplace Assessment Tool**
- How would you use it?

Categories	Organization	Team	Individual
Direction			
Structure			
Capabilities			
Processes			
Motivation			

S Situation - Current Condition
C Causes - Why
O Opinions and Reactions - to Situation
O Optimal Outcome - Desired State
P Preliminary Plan – What's Next

HR EXCELLENCE

Layout Closing | Slide 29 |

Advance to Layout Closing

Say: Next I'd like to give you an opportunity to apply these 2 tools we just reviewed – Workplace Assessment and SCOOP - to your working life:

- Think of a customer *Situation* that you would like to further Assess
- For example, if you are in:
 - **Talent Development:** A Manager approaches you requesting a specific development opportunity for their team
 - **Talent Acquisition:** A Manager approaches you and is not clear about exactly what they are looking for in their next hire
 - **Total Rewards:** You become aware of a compensation issue – there are current BSC employees who are not being paid as well as new hires coming into the company.

Now consider which tool you'd like to use to help you assess your situation – Workplace Assessment Tool or SCOOP?

Keep in mind that there are no wrong answers here.

Just review the 2 tools and see which might be a better fit for you in this situation.

Look at the structure of the tools and the questions. Which seem most relevant to your situation? How would you use it?

I will give you five minutes to make some notes about this. You can use any open space in your Resource Guide.

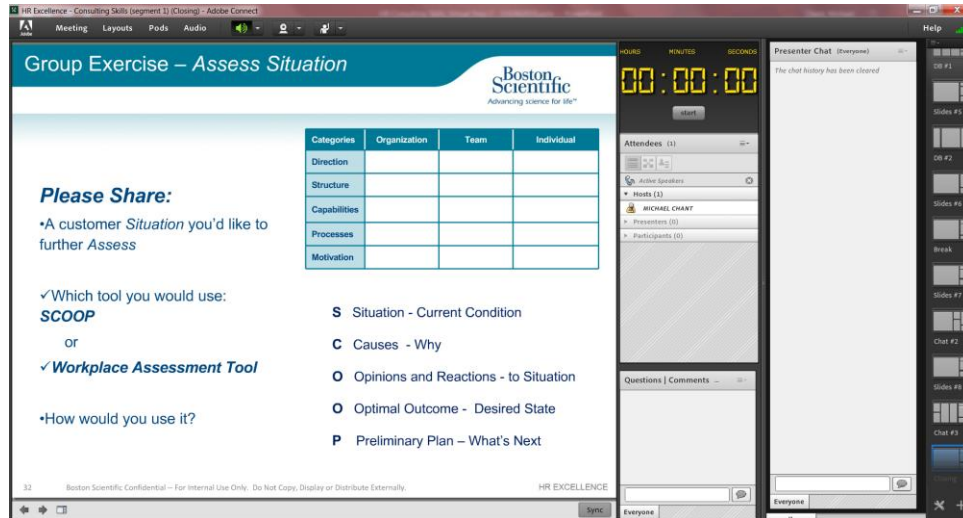
I want to let you know that I will be asking for volunteers to share examples soon, so please be ready.

Give me a green check when you are ready to move forward.

Time for this slide: 10 minutes

Elapsed time as of the end of this slide: 2 hours and 20 minutes

Layout Closing | Slide 30



Layout Closing | Slide 30 |

Say: Next let's take a few minutes to share and learn from each other. Please raise your hand and share your example with the group.

If the group needs prompting:

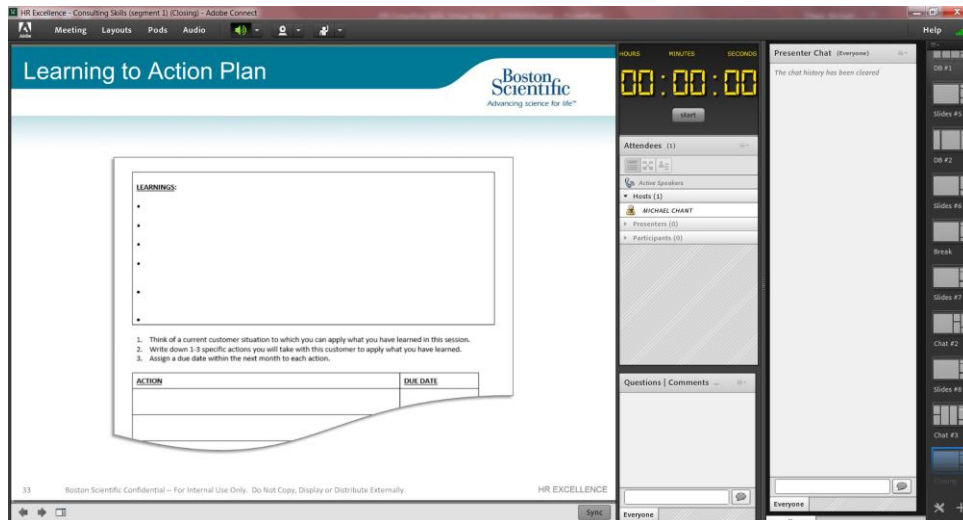
Ask: What examples do we have from our HRBPs? From Talent Acquisition? Total Rewards? Talent Development?

*If no one shares an example, have one of the other Facilitators share an example
If people do volunteer, ask for 2 or 3 examples and then move on.*

Time for this slide: 10 minutes

Elapsed time as of the end of this slide: 2 hours and 30 minutes

Layout Closing | Slide 31



Layout Closing | Slide 31 |

Say: Please take a few minutes to look at your Action Plan and note any learnings from this most recent exercise

Along with anything else you would like to capture from today.
Give us a green check when you are finished.

Layout Closing | Slide 32

The screenshot shows a presentation slide titled "Layout Closing | Slide 32" from a Boston Scientific meeting. The slide is part of an agenda for "Step 2" and "Step 4". Step 2 includes "Develop Relationships" (Contracting, Influencing Strategies) and "Assess Situation" (Workplace Assessment Tool, SCOOP). Step 4 includes "Seek Solutions" (Leader Assimilation, Team Values Exercise, SWOT Analysis, 5 Whys, Impact/Effort Grid, Brainstorming, Decision Making Tools). A central diagram shows a process flow: "Develop Relationships" leads to "Assess Situation", which leads to "Seek Solutions", which leads to "Facilitate Action", which leads to "Check Results". The diagram is framed by "RELATIONSHIPS" at the top and "RESULTS" at the bottom. The slide also features a timer, a presenter chat window, and an attendees list.

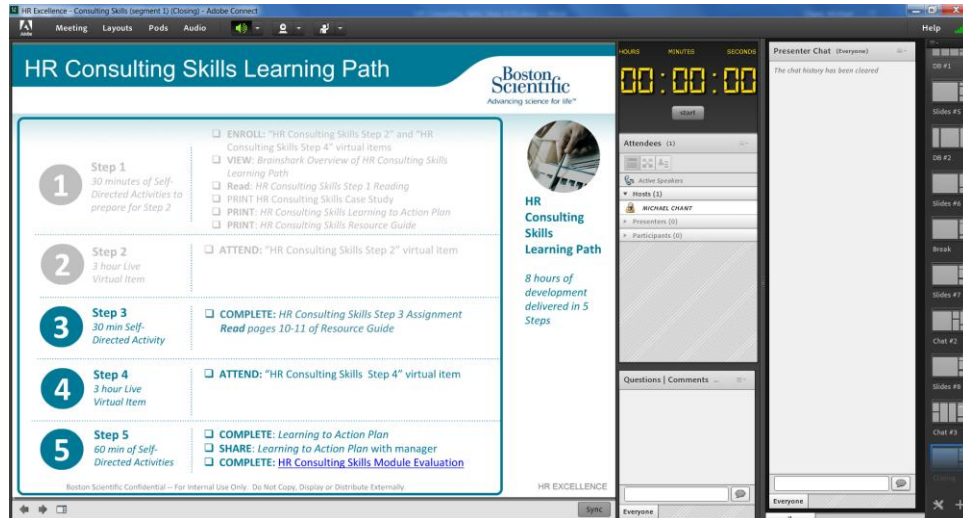
Layout Closing | Slide 32 |

Say: Just to review, here is what we covered today and what we'll cover tomorrow.
(Facilitator may want to use green pointer)

Say:

- Today we covered the first phase of the HR Consulting Skills model – **Develop Relationships** – by discussing **Contracting** and **Influencing Strategies**
- We also looked at the second phase – **Assess the Situation** – and reviewed the **Workplace Assessment Tool** and the **SCOOP model**
- During tomorrow's session, we will spend most of our time reviewing some of the tools found in Phase 3 of the HR Consulting Skills model – **Seek Solutions**.

Layout Closing | Slide 33



Layout Closing | Slide 33 |

Review Learning Path

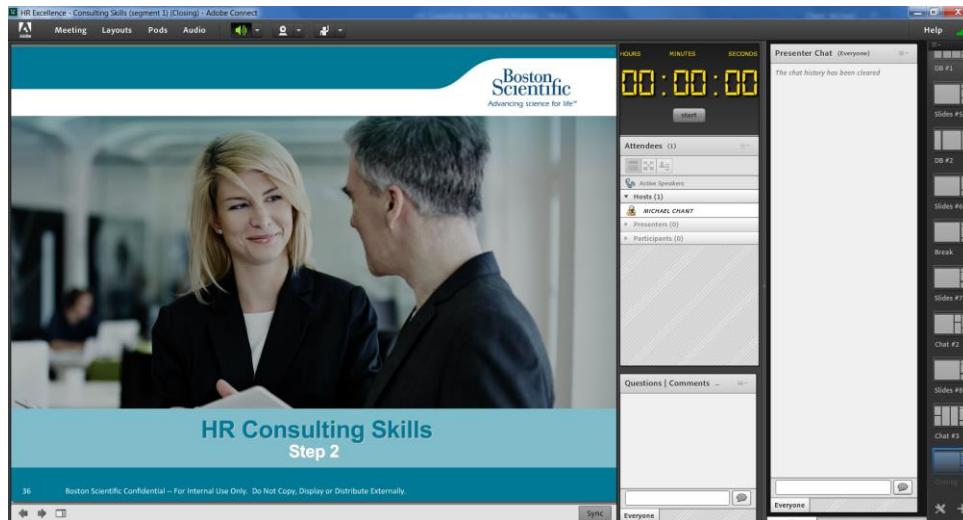
Say: Okay, let's step back again to the big picture and review the HR Consulting Skills learning path.

We have now completed **Step 1 and Step 2**.

Prior to tomorrow's session, we'd like to ask you to completed **Step 3** which consists of reviewing two pages in your Resource Guide – Pages 9 & 10. Tomorrow's virtual session is **Step 4**.

Lastly, **Step 5** is there to support the transfer of your learning back to the workplace. At the end of tomorrow's session, we ask that you complete your *Learning to Action Plan* and meet with your manager to gain their alignment and commitment to your development.

Layout Closing | Slide 34



Layout Closing | Slide 34 |

Say: Thank you. We will continue to learn about new tools, processes and best practices in our next session. Looking forward to seeing you there!
Our session begins at _____

Close Session

Elapsed time as of the end of this slide: 2 hours + 40 minutes