

Expico Consulting



The key to performance improvement





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'Work on yourself as
well as your business.'
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Success demands single-mindedness of purpose

Expico was founded in 2006 by Willie Donald in order to bring performance focus to executives and organisations looking to exceed expectations and norms.

Developing new competencies is critical for aspiring managers and executives. Too often individuals find their career stalling, or encounter what seem to be insurmountable difficulties as they rise through the ranks and acquire new responsibilities. The competencies that get us through the first stages of a career are more often than not, technical competencies. We perform well in what we are trained at, whether that is as an engineer, a lawyer, an accountant or whatever is our particular business. We tend to develop those competencies through training and experience and are promoted accordingly. These first steps are achieved primarily by **working on the business**, and the focus is more often than not on business competency.

To go higher, or become more rounded, or perhaps to become a general manager rather than a functional manager we need, however, to work on something else. At Expico we believe that, in order to improve, we need to spend time **working on ourselves**. By developing our personal skill set, becoming more self aware and as a result, more in tune with others we can dramatically improve performance.

The following sections outline our approach to;

1. Leadership and personal development
2. Team building
3. Organisational change
4. Sales training

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‘Strong corporate track
record and a passion for
excellence.’
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Willie Donald

After a 22 year career in blue chip organisations Citibank, Scottish Widows and Bank of Scotland where he was a General Manager and chaired a number of subsidiary boards, Willie joined Belgian investment bank Petercam SA in 2000 with whom he co-founded their UK subsidiary Financial Freedom (Europe) Ltd., whose principal activity was advising European retail banks regarding the construction and financing of new corporate and property funding solutions.

Prior to this, as Head of eCommerce he was responsible for setting up Bank of Scotland's online European business in The Netherlands, having previously headed up the mortgage business development operation. During the 1990s he was responsible for developing leading product innovations including cheque book mortgages, equity release loans and the UK's first online savings account, iSave. He led Bank of Scotland's first ever securitisation programme, raising over £1 billion in the bond markets to finance specialist lending. As Sales Director he led a 5 fold increase in new business.

During his time at Citibank he spent time in training and management development and he became an accredited LIFO® analyst in 1986, having been trained by Alan Katcher who developed the method along with Stuart Atkins at the University of Los Angeles in the 1960s and 70s.

Willie's interests are primarily activity based and as a sports fan is a student of performance improvement and achievement. He is a former cricketer and professional footballer; and represented Scotland at cricket 57 times, including a stint as captain. He represented Scottish and British Universities on the soccer pitch. He sees strong parallels between sporting success and business performance, believing that both are founded on positive attitudes coupled with first class competencies.

He holds a degree in Mathematics from Aberdeen University where he still enjoys a strong relationship, mentoring senior undergraduates and delivering workshops in positive communication for the Graduate Alumnus Association. He also Chairs the University of Aberdeen Career Mentoring Board.



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‘Accomplished in helping
teams to succeed through
major change.’
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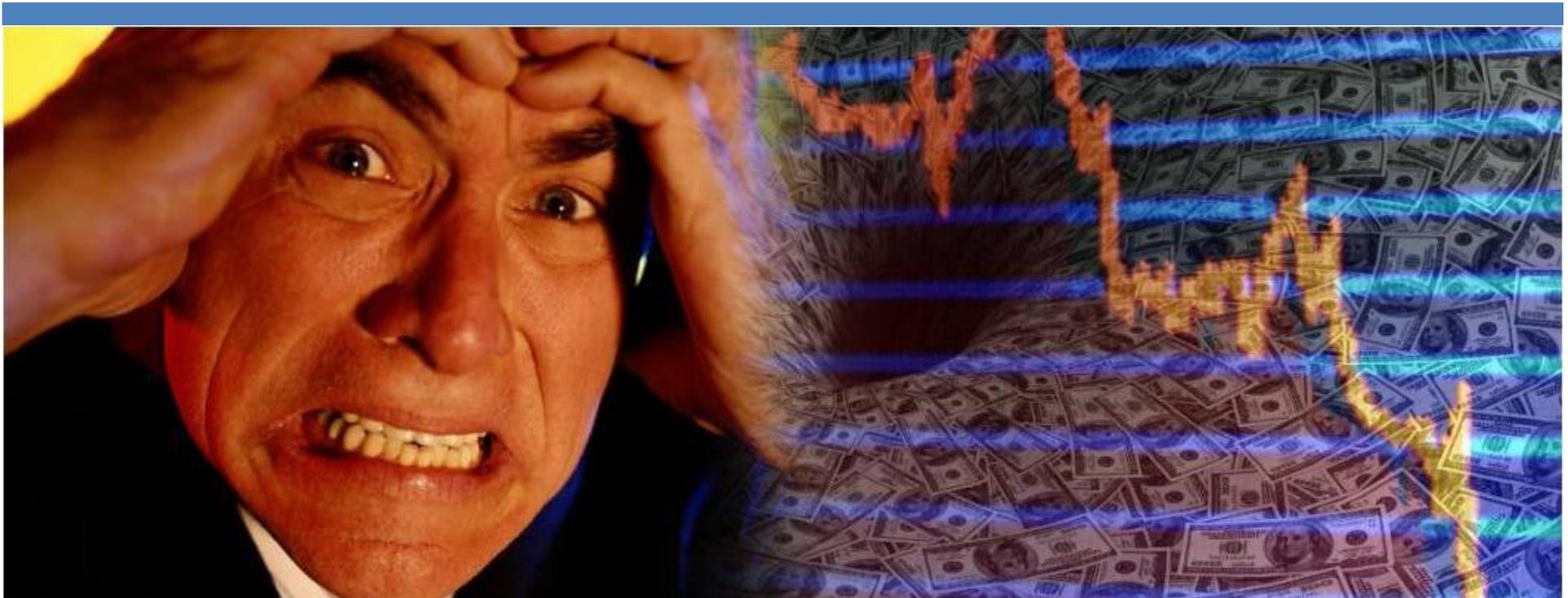
Ian Gourlay

An expert catalyst for raising leadership impact and team performance through change. Recruited from university by General Accident (now Aviva plc) in 1988 to their senior management development programme, Ian’s 13 year period in financial services was characterised by accountability for business delivery and extensive experience in the management and leadership of change. Formative experience from that included delivering strategic business-to-business partnerships and being accountable for the successful turnaround and development of under-performing business units.

Ian’s involvement in 3 major corporate integrations up to 2001 developed his interest in the role of organisational culture in times of disruptive change. He developed from that a deep practical knowledge that has shaped his work since then. As a business consultant and coach, Ian has wide experience at the heart of business change across sectors and cultures in over a dozen countries in Europe, Africa, the Middle East, Asia and Australia. A consistent feature of Ian’s 17 years in consulting is being asked back by clients to help with new challenges. Their feedback is that this flows from Ian challenging and guiding their people to step up and bring about sustainable change that they can truly call their own.

A graduate in History and International Relations from Aberdeen University, Ian is a Chartered Insurer and an MBA graduate from the OU Business School. He is an active supporter of great organisations whose charitable work enables people to flourish in difficult circumstances, in particular: the work of *Sistema Scotland* and *Snow-Camp* in deprived communities across Scotland; the *Vine Trust*, which changes lives in Tanzania and Peru with its medical ships and home building projects. The common denominator for all of these and Ian’s work is faith in the capacity of people with purpose to bring about momentous change.

Leadership



Managing your strengths and controlling your excesses





“The results lead to an
action plan for self
improvement.”

The strength management method

‘Effective leadership is not about making speeches or being liked; leadership is defined by results not attributes’, so said management guru Peter Drucker. And what better way to achieve results than to put our strengths to work. Our method concentrates on capitalising on existing strengths, developing new strengths and minimising the effect of weaknesses.

The process firstly builds self awareness which in turn builds awareness of the needs of others in terms of how they are best managed ... or, led. Feedback can be taken from colleagues to build the picture and the results lead to an action plan for self improvement.

The aim is to broaden and deepen leadership styles by capitalising on existing strengths, augmenting them, extending them and bridging to the strengths of others, as well as a crucial component, managing excesses (or weaknesses).

We utilise world class behavioural analysis and coaching techniques to focus on the key leadership requirements of:

1. **Instilling mission & purpose and driving action**
2. **Making decisions and solving problems**
3. **Delegating tasks**
4. **Giving feedback**
5. **Communicating information**

But this is not a theoretical programme. The action plan utilises real workplace experiences to provide the practice and learning opportunities.

By gaining a deeper understanding of their own operating styles and the styles of others, participants will practice and improve their leadership capability resulting in robust and permanent improvement.



'Practice makes perfect.
Perfect practice makes a
leader.'

Case Study – UK National Sports

A member of the leadership team in this significant high profile sports organisation had reached a crossing point in his career. Being expected to lead the negotiations and arrangements for venues, media participation and relations with third parties (including political) for one of the UK's most prestigious sports, whilst working for a demanding and somewhat unsympathetic boss was exacting its toll.

Doubts were appearing ...

Our solution was the 6 month Strength Management Leadership Programme. The format was 2 formal meetings per month plus, of course, unlimited contact via telephone and email.

The objective was to ensure the client fully understood his own operating style in terms of strengths and weaknesses. These were mapped against his colleagues view of him (a 360° analysis) and an action plan developed. Real life business challenges were used as the platform for learning, developing and practicing his new skills.

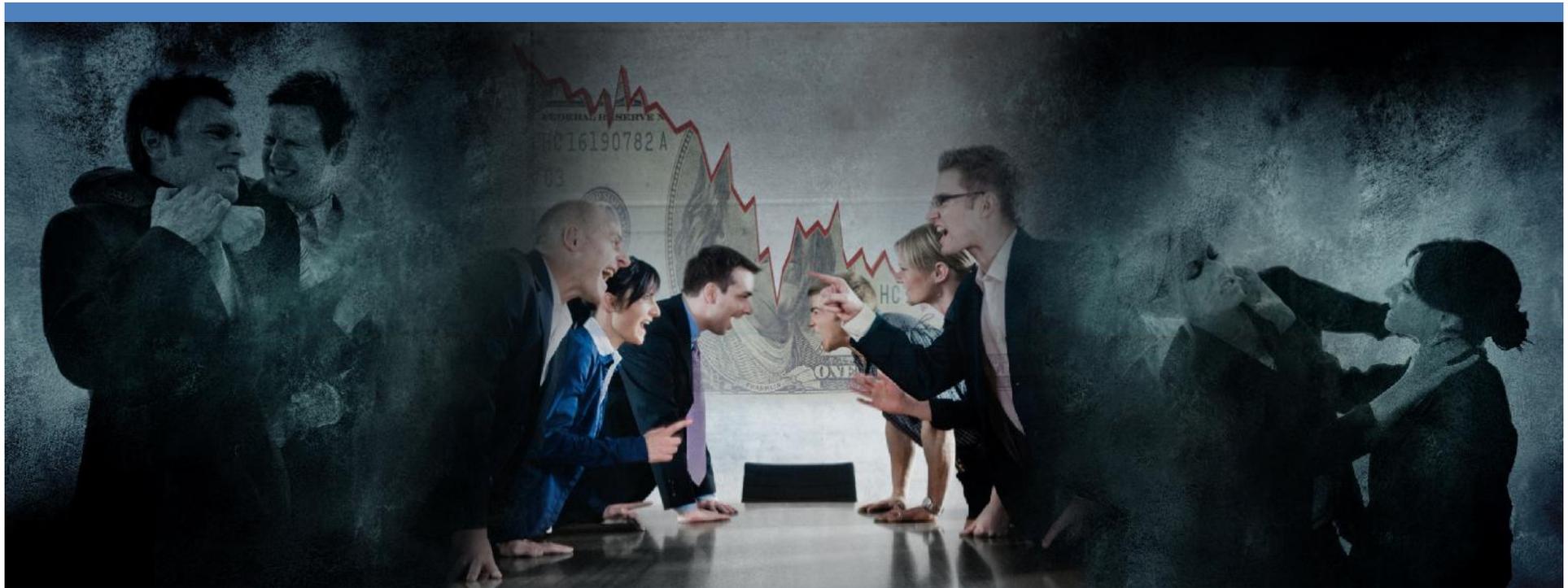
The monthly agenda included:

- 1. Strength Management analysis to identify strengths and weaknesses**
- 2. A 360° analysis providing feedback from direct reports, peers and boss**
- 3. Personal action planning**
- 4. Implementation of the action plan, utilising the Strength Management Method**
- 5. Practicing, reviewing and learning new behaviours and leadership approaches in real business situations**

'I have been offered a promotion to Managing Director ... I am in no doubt that without your coaching this opportunity would not have presented itself, so very many thanks indeed.'

Managing Director

Team Building



Building high performance teams





'The whole is greater
than the sum of the
parts.'

Becoming a high performing team

'The whole is greater than the sum of the parts.' Everyone's heard that expression. And we're all familiar with what it means: an effective team can accomplish more as a whole than its individual members can accomplish on their own.

The key word here is *effective*. Building an effective, high-performing team requires more than simply throwing a group of outstanding individuals into a room and telling them they can't come out until they have a solution. And maintaining an effective team requires planning, communication and decision-making. Assessing individual strengths and weaknesses, building support, establishing the conditions for effectiveness, agreeing on your goals—and you're on the road to building a championship team.

Our workshop is a high intensity programme for leadership teams, departmental teams or cross-functional teams; in fact any group who have to work together to achieve your goals.

We utilise world class behavioural analysis and coaching techniques to:

1. **Build self awareness of individual strengths and weaknesses**
2. **Understand the operating styles of team members**
3. **Identify the most effective operating styles for the team and its members**
4. **Improve communication and deal with the 5 common dysfunctions of a team**
5. **Improve the decision making process**

But this is not a theoretical programme. Practical workplace examples are used to give participants a real understanding of their role in the team and their performance within the group.

Team members will leave the day with a personal and group action plan, and the team will build a new set of performance focused operating processes.



'Develop strategies for
better working
relationships.'

Case Study – Professional Services

The management team of this large legal firm with offices across the UK had embarked on a major strategic change initiative. Like in many change programmes, the team felt overwhelmed by, not only the huge implementation challenges, but also the difficulties in obtaining buy-in to implementation from the people; especially the partners.

Cracks were appearing ...

Our solution was to facilitate a 2-day offsite workshop with the management team (the executive board) in order to remove them from the day-to-day, and allow them to explore their individual management styles, understand their strengths and weaknesses and develop strategies for better working relationships, improved decision making and leadership capability.

Implementing the change programme was one of the hardest of management challenges since the team was faced with cynicism, denial and often criticism at every turn. The workshop enabled them to develop their own 'rules of the game' to ensure they led with consistency, led with conviction and belief, and were able to modify their behaviours from 'administrative/bureaucratic' to 'facilitating/selling'.

The workshop agenda included:

1. **Management gaming to witness behaviours and operating styles in new contexts**
2. **Strength Management analysis to identify strengths and weaknesses**
3. **Operating Culture analysis to identify change cultural shift priorities**
4. **Investigating the 5 common dysfunctions of a team**
5. **Building the resulting action plan; 'Rules of the Game'**

'You will be pleased to hear we are all in the pub, so you must have done something very good. Many thanks on a personal level for a very interesting exercise in self awareness and development. Very useful for all of us and fed into our behaviours last night'

Head of Corporate Law

■ Strategy & Organisational Culture Change



'Culture eats strategy for breakfast' (Peter Drucker)



'Perhaps they've simply
got their heads in the
sand.'

The strategy myth

Most strategic initiatives fail, not because the strategy itself is flawed, but because implementation fails. And implementation fails because not enough thought and effort has been put into the cultural change required to see the new initiative through.

Building an effective change process requires more than simply throwing a group of outstanding individuals into a project and telling them to get it done. Changing the way we do things is one of the most fundamental managerial challenges. Employees often struggle with change, for many reasons. Perhaps they haven't got the skill set, perhaps they're scared, or perhaps they've simply got their head in the sand. For example, moving from a bureaucratic/administrative culture to one of customer focus and selling is a dramatic shift, and executives, managers and staff need to understand, and buy into, the operating imperatives of the new strategy. They need to change their behaviours.

Our workshop is a high intensity programme for leadership teams, departmental teams or cross-functional teams; in fact any group who have to work together to achieve change by achieving your goals or implementing your strategy.

We utilise world class behavioural analysis and coaching techniques to:

1. **Build self awareness of individual strengths and weaknesses**
2. **Understand the operating styles of team members and the team culture**
3. **Identify the most effective operating styles to implement the new culture**
4. **Build a bridge from the old culture to the new culture**
5. **Action planning to develop the new 'rules of the game' to deliver the new culture**

But this is not a theoretical programme. The action plan is specific to the implementation challenge within the business.

Participants will leave the workshop with a personal and group action plans describing the operating styles and behaviours required for change implementation.



'Members of the team are
now performing
brilliantly.'

Case Study – Global FMCG

This global brand acquired a significant UK manufacturing and distribution organisation and set about changing the culture from one of a traditional bureaucratic/administrative style to a brand led, dynamic customer focused entity. The brand leaders inherited teams who embodied traditional thinking and practices, who were struggling to come to terms with the huge cultural shift required.

Stress levels were rising ...

Our solution was to create and deliver the 'Building the Culture for Success' and 'Implementing the Culture for Success' workshops for the brand teams to enable them to understand their operating styles as individuals, calibrate their current operating culture, describe the 'ideal' culture and subsequently build an action plan to help them bridge the gap from current to ideal.

We used Strength Management Personal Profiling to bring out the individual style and the Organisational Culture Profile to bring out both the 'current' and 'ideal' cultures. Action planning completed the picture to build the 'rules of the game' going forward. In addition, short high impact leadership coaching was implemented on an individual basis to underpin the personal action plans.

The workshop agenda included:

1. **Strength Management Personal profiling and individual leadership coaching**
2. **An Organisational Culture analysis of both current and ideal cultures**
3. **Facilitated analysis of the 'gap' between current and ideal cultures**
4. **Building an action plan to bridge the gap**
5. **Follow up workshop after 6 months to review/refine the process of change**

'The difference is like night and day. In fact we were considering removing 2 members of the team, but they have shown the greatest change, and are now performing brilliantly.'
Brand Director



'We have survived and now we're on a growth trajectory'

Case Study – International Oil Services EPC Contractor

This UAE & Singapore based Engineering, Procurement & Construction contractor in oil and gas was already in trouble when the oil price crashed in 2014, turning a crisis into a struggle for survival. It was a “change or die” situation. A new executive team was brought in for 2015 by the shareholders with a brief to turn the business around from a sustained period of severe losses.

Our involvement came at an early stage of the new CEO's tenure, with an engagement to work with the remaining senior players to guide them in the development and delivery of a strategy to survive and then grow, together with growing a sharp edged culture of accountability...and doing it quickly.

We worked with the leadership team and their senior management colleagues in the definition and follow through of a major change programme. This combined a structured rescue and growth plan with highly focused coaching for key players

This successful engagement covered two years, working in-country regularly in the UAE and Singapore, linked by week-to-week support from our base in the UK. Our intervention included:

1. **Strategy development** in support of the Executive and facilitation of the team's definition and tracking of its Strategy Execution Plan.
2. **Signature Strength profiling and coaching for key players, in-country and on Skype.**
3. **Organisational Culture assessments, together with development of a road map for the development a culture of accountability.**
4. **Regular delivery and look-ahead workshops in the UAE and Singapore.**

'We have turned the corner. Our 2017 numbers show a positive EBITDA of \$2m, a far cry from negative \$72m at end 2014. We have 83% of our 2018 budget in place and actually expect to beat that.'

CEO comment in response to the question have we made a difference to your business?

Sales Training



Everyone sells





'Everyone sells.'

Selling is a vital communication process

Well developed communication skills are vital for creating client conversations that count. Communication is a complex system of coding and decoding. In order for it to be effective it requires the adoption of specific competencies, and that those competencies are implemented in a planned, structured and monitored system.

Selling is a process and every organisation will fine tune its sales process to suit its strategy, products and customers. The sales process is built into the organisational culture, and the organisation lives and breathes through its sales success.

Our 3 day workshop based programme can be implemented in one go; or many clients prefer a modular approach which allows attendees to practice new skills before progressing to the next level.

Module 1 – 'Professional Selling Skills' concentrates on basic sales techniques, understanding the sales process, how to discover what the client needs and building client solutions

Module 2 – 'Advanced Selling Skills' deals with preparing for the sales meeting, engaging with different types of client based on understanding client behaviours, managing client concerns and reaching agreement

Module 3 – 'Account Development Strategies' looks at the business development cycle, negotiations skills, exploring & trading and measuring and reviewing

The workshops exercises provide the opportunity to practice new found skills and also to relate them to real business challenges.

Participants will leave the programme with a robust sales process, an understanding of critical sales techniques and a grasp of how great clients are developed and business negotiated



'Bridging the gap
between theory and
reality.'

Case Study – UK Service Sector

After over 100 years in existence the latest economic downturn was having a detrimental effect on gross profit. Clients were harder to find, and the business was becoming commoditised by competitors and customers alike. After an exhaustive strategic review a key plank of the resulting plan was to implement a sales culture throughout the organisation.

This represented a significant change programme ...

Our core 3 day sales training programme was customised to suit the client's particular requirements. With the client we concluded that delivering the 3 modules at monthly intervals would allow participants the opportunity to practice new techniques in real sales situations. Reporting those experiences back into the training process enhanced the relevance of the material and bridged the gap between theory and reality.

None of the participants had undergone sales training before so early wins were critical. The training was designed so that at each module, concrete skills and competencies were learned so that implementation would be immediate, rather than waiting until the end of the programme.

The programme included:

1. **A full training needs analysis with the senior management team (and CEO)**
2. **The customisation of the core 3 module programme**
3. **Development of pre-work exercises, module specific exercises and action planning**
4. **Delivery of the 3 modules over 3 months in groups of 8**
5. **Follow up review process**

'I pitched my fee. I got a raised eyebrow, and a short intake of breath. After 2 minutes the client accepted. Before your training session, I would have jumped in with a lower fee just to get the gig'

Head of Property



'Performance
improvement is not
sector specific.'

Our clients

Years of experience has taught us that executive and managerial excellence are synonymous with achieving business results. The competencies required are not sector specific, and neither are they functionally specific. They apply equally to operations as they do to finance, or sales.

As world famous executive coach and author Marshall Goldsmith said, 'What got you here won't get you there'; meaning that the technical competencies we use to achieve success in the first stage of our careers are not those that are required to lead and motivate individuals and teams as our careers progress.

Our clients are therefore drawn from a range of industries and sectors ...

- **Oil and gas industry (Houston & Aberdeen)**
- **Professional Services (Edinburgh, Glasgow & London)**
- **Global FMCG Drinks (Amsterdam, Edinburgh & London)**
- **UK National Charity for Deaf & Blind (Glasgow & London)**
- **Financial Services (London)**
- **Property Development (Edinburgh)**
- **Public Sector Advisory (Scotland)**
- **National sports bodies (England & Scotland)**

Our mandates can range from 1 day workshops, 6 month executive coaching programmes to 2 year consulting projects. We customise our solutions to suit our clients' challenges, utilising best of breed methodologies.

All our consultants have been career executives with hands on experience at senior level across a variety of industries.



'Getting started is the
hardest part. Do it now.'

How to get started

Simply contact Willie Donald at Expico directly on;

+ 44 (0) 7887 870646

Or email Willie at willie.donald@expico.co.uk

He will be delighted to discuss how workshops or individual coaching can help your business become more effective.

Workshops are most effective for groups of 5 to 10 (although larger groups are possible) and include all pre-course materials, course materials and handouts (paper or electronic). They can be run over one, two days or sometimes 3 days; although some organisations prefer a modular approach, perhaps holding workshops monthly so as to embed and practice new competencies as the programme unfolds.

Whatever the preference, the content can be customised easily to suit client priorities.

The programmes are facilitated by Willie Donald and/or with associate partners, depending on the size and nature of the project. All our partners work with significant organisations in the corporate sphere in Edinburgh, Glasgow, London, the USA and Europe specialising in leadership, team building, strategy and sales.

For more information please visit www.expico.co.uk