



## Who We Are

Our vision statement “Helping you do what you do better” describes exactly what we do for our clients. We are here to help organizations identify and establish strategies to optimize development of their organization. We are a company founded and led by a core team of former Marines and corporate leaders with extensive experience leading and optimizing everything from small teams to large organizations in a wide variety of highly dynamic environments and circumstances.

The Organizational & Professional Development (O&PD) solutions we have applied over the past 20 years, and the successes our clients have realized are the direct result of customizing our approach based on our collective civilian and military leadership experience and O&PD backgrounds. Our input, candor and one-on-one counsel is relied upon by executive and junior-level leaders alike to help maintain the grounding and connection required for effective leadership in every organization we serve. We have developed an expertise and a reputation that distinguishes us from many others purporting to provide similar services. We are unique in that we offer clients a tailored approach to O&PD using tried and true models and tools, and then teach our clients to use them to sustain their own O&PD successes after we’re gone. Our simple approaches assist them in establishing strategies that yield results and posture them to respond with dynamic organizational solutions rather than always reacting to their exceedingly rapid pace environments.

Our primary lines of products and services are: Organizational Development, Professional Development, and Professional Facilitation. We have developed unique approaches, tools, templates, and guidelines that our consultants, as expert facilitators, use to guide clients through the rapid development of their own solutions. These include organizational assessments, surveys, training, organizational structure validation, internal and external roles, responsibilities & relationships mapping, process development & capture, stakeholder mapping; and development of a vision statement, strategic objectives, mission statements, operational objectives, interactive operating guides, as well as a host of unique Leadership Development courses, workshops and seminars designed specifically to address our clients’ organizational needs.

Central to who we are and how we have developed over our 20-year history are our values: *Do the Right Thing, Uphold the SG Brand, Meet Client Expectations, Work Hard to Identify Simple Solutions, and Treat Others the Way You Want to be Treated.* As a result, our team members have established a reputation of integrity, reliability, hard work and bringing solutions to the table in collaboration with our clients by rolling up their sleeves and becoming part of the team.



## Organizational Development Consulting



### Organizational Assessment

The typical starting point for Organizational Development initiatives, our assessment reveals where and how an organization needs to adjust and helps establish a plan tailored to the organization's unique characteristics and the results it is trying to achieve. It includes a comprehensive report that describes the analysis of collected data and the associated recommendations for correcting, mitigating or leveraging findings in the assessment.



### Organizational Assessment & Development Tool

The same tool we use when conducting organizational assessments is available to others in hard copy or as an interactive app. It provides the format and instructions on how to observe, capture data, assess and analyze any organization and then develop action plans for addressing how to correct, mitigate or leverage the results of the assessment. Search for "organizational development" and download for free from your app store.



### Organizational Development Strategy

A tailored, executable strategy for organizational development, and all the objectives and recommendations for its implementation. Describes how to bring structure to a highly dynamic environment while posturing the organization for its inevitable ongoing evolution. The OD Strategy addresses all the dynamics that exist between all elements of a structured environment where there is collective responsibility for the development and delivery of products and services; from the technical processes required, to the behavior and culture of the organization itself.



### Organizational Surveys

Our unique and tailored approach to organizational surveys ensures you get exactly the information needed to enhance executive decision-making. Our approach to surveys not only collects the information required but validates the raw data with a small survey team of experts from your organization before conducting any statistical analysis of the responses. We rapidly provide a comprehensive report including statistical analysis of the responses and recommended next steps for organizational development based on the results. Planning, developing and executing surveys effectively will reveal whether you need to adjust your organization to achieve your bottom-line objectives.



### Transition Planning

A formalized, deliberate and facilitated approach to developing a Transition Plan for any organization to migrate from its current state to some known and defined future state. The plan includes capturing all key elements of the future state organization and developing a roadmap that guides the transition.



### Value Project Leadership

Our clients realize added value from a unique, deliberate *leadership* approach to cultivating relationships, tracking and reporting progress, planning resources, and driving participation that not only enables successful completion of contract requirements but always exceeds client expectations.



### Process Mapping

Capturing processes quickly & effectively challenges every organization. Traditional approaches to process mapping can be time-consuming and burdensome, so most organizations neglect the required maintenance of a process once captured. Shackleton Group's unique approach addresses all of these concerns through speed, accuracy and repeatability by establishing expectations and boundaries, and by ensuring buy-in through appropriate inclusion of actual process users in the design.



### iPOG/iCD

Interactive Program Operating Guides (IPOGs) and Interactive Charter Documents (ICDs) are repositories for essential team/business unit information that provide crucial insights into your team's core information, structure, procedures, operating guidelines, key processes, and Roles, Responsibilities and Relationships (R<sup>3</sup>). They are designed as a tools for team members to help establish long-term and day-to-day alignment in the execution of the team's core function and objectives, and most importantly, the development and delivery of their products and services.



### Desktop SOPs/POGs

SOPs/POGs provide a means to formally document and codify all the organizational information necessary, acting as a framework or guidelines by which your organization and its members will operate. SOPs/POGs are purposed to be living documents that reflect the current state and structure of your organization. When properly constructed, Operating Guides provide the perfect tool for setting boundaries and expectations; defining roles, responsibilities, and relationships; minimizing communications challenges; and mitigating disruptions from personnel turnover.



### Concept of Operations (CONOPS)

Designed to provide situational awareness and understanding to key stakeholders in the fundamental functioning and execution of a critical, emerging/developing project or concept.



### Rapid Response Planning

A preplanned, published and tested response that allows an organization to rapidly deploy the assets and resources required during critical circumstances and allows the organization to capitalize on an opportunity or avert a critical challenge or potential crisis. Proper development of your Rapid Response Plan allows for its decisive and timely execution and is achieved by Shackleton Group using the US Marine Corps Rapid Response Planning Process (R2P2).



### Organizational R<sup>3</sup>

R<sup>3</sup> is the organization's template that identifies and formally documents each key **Role**, its associated **Responsibilities** and its **Relationships** (R<sup>3</sup>) with other key roles both internal and external to the organization. R<sup>3</sup> is manifested in diagrams that illustrate the two-way communications between those roles and describe the nature of the relationship from each role's perspective.



### Facilitation Instruction Manual

A licensable, comprehensive how-to guide with step-by-step and detailed instructions for facilitating the capture of all of the information contained in an interactive Program Operating Guide (iPOG) and/or interactive Charter Document (iCD). All the resources, paper and electronic copies of all the templates, and instructions on how to facilitate and assemble all portions of interactive management and leadership systems.



### Executive OD Consulting

Senior SG consultants tap in to their broad base of organizational development and leadership experience across the highly dynamic environments of government, industry and the military. We help provide a steadying hand and sound counsel to the executive leadership of your organization when navigating the challenges associated with planning, developing and instituting change or improvement initiatives in your organization.

## Professional Development Services

Our leadership workshops, courses and seminars described below were all born out of and designed specifically to address real client needs that we have uncovered during our twenty-plus years of Organizational Development Consulting. Each offering is brief, to the point, and focused on simple concepts that can make the biggest difference in your organization.

Expectations should include:

More Rapid & Adaptable Thinking  
Increased Performance & Proficiency  
Improved Accountability  
Expectation Alignment  
Better Teamwork & Ownership  
Increased Innovation & Cost Effectiveness

More Intuitive Decision Making  
Higher Customer Satisfaction  
Improved Cross Team Communications  
Improved Internal & External Relationships  
Improved Trust, Loyalty & Morale  
Accelerated Career Growth



### Corporate Maneuver Warfare 15 hours – In person

***A Practical Guide to Organizational Leadership*** – Targeted primarily at mid-level managers and leaders, but valuable for any team member. Focused on fine-tuning elements of leadership which, when learned and applied effectively, can arm anyone

with game-changing tools and skills for themselves, their people, and their organization. A progressive approach is used to develop the concepts by successively building upon each lesson. The course begins by establishing a baseline on the fundamental concepts of leadership, progresses to the leader as an individual, and then to being a leader as part of an organization. Finally, the course wraps up with an in-depth consideration of how they will apply what they've learned to their own organization.



### Start Making a Difference! 2.5 hours – In person or virtual

***Making Feedback Useful*** – A quick seminar focused on simple concepts that will help ensure feedback is given and received more effectively by learning how to turn difficult discussions into opportunities for growth. A practical approach for anyone to start making a difference in their organization.



### Mastering Facilitation 4.5 hours – In person or virtual

***Simple Leadership Techniques for More Productive Outcomes*** – Introducing simple techniques to facilitation which enable getting the most out of any group that is meeting with a common purpose; whether making a decision, solving a problem, or simply exchanging ideas and information. Easy to understand and employ, these concepts will

have a significant, positive, and immediate impact on the level of collaboration and synergy with which groups and teams conduct themselves.



### Doing the Right Thing 8 hours – In person

***Bridging the Gap Between Leadership and Ethics*** – Focused on establishing a culture within an organization that understands what it means to do the right thing. Topics include establishing an understanding of the concept of ethics, the challenge of dealing

with ethical dilemmas, and an approach for addressing those dilemmas. The workshop culminates with participants' consideration of how to apply the concepts discussed in their own organization.



### **Sending the Right Message** 3 hours – In person or virtual

***How to Communicate Strategically*** – Three hours to enabling more productive engagements. Whether delivering a presentation, meeting with a group, or meeting one-on-one, this workshop focuses on easy-to-use techniques that will ensure internal and external communications are not only productive, but also stay aligned with the strategy of the organization.



### **Decision Making Under Stress** 15 hours – In person

***Managing and Responding to Uncertainty*** – In the real world, the routine can become chaos, and even our best-laid plans can result in initial failure causing stress and uncertainty. The ability to make decisions quickly and efficiently in these emergent situations is the hallmark of a successful leader. This course includes a solid theoretical base coupled with a practical application of the material, and is divided into eight stages, with participants experiencing increasing levels of stress at each stage, enhancing resilience, and enabling more efficient and successful decision-making.



### **Leading in a Virtual Environment** 45 minutes

***Getting the Most out of Remote Engagements*** – Virtual, or pre-recorded video and podcast available on our website. Critical concepts that are simple enough to understand and employ. Addresses skills and techniques that can have an immediate and positive impact on the outcome of any virtual event.

## Professional Facilitation Services



### Issue Mitigation/Smoke Jumping

Shackleton Group will help you identify, address, and resolve immediate or long-term issues within your team. Our extensive leadership and organizational consulting experience, and our comprehensive facilitation skills allow us to “smoke jump” and rapidly respond to urgent organizational issues that require immediate attention.



### Conferences & Events

Shackleton Group will help you plan for, coordinate and execute successful conferences or events. We will work with you to develop a comprehensive event execution strategy that includes a detailed facilitation plan and agenda for successfully executing your event. Our facilitators will take you and your team step-by-step through planning and execution of your event providing the tools and experience to ensure successful accomplishment of the intended purpose and objectives.



### Keynote Speaking

Highly dynamic and entertaining speakers with topics ranging from Making Tough Calls to Decision Making Under Stress and many more can help energize your team on issues that are timely and relevant for you and your organization. Have an idea for a keynote speech, but don't know how to put it together? Do you need a custom-tailored keynote speech on a leadership topic of your choosing? Contact us and see what we can do for you.