

TRICorporation



Customer Emulations

A Competitive Experiential Exercise by TRI Corporation

It is not enough to have a winning vision and strategy. Your team must connect their own work functions and roles to that strategy. Customer Emulations will enable them to do just that by driving successful execution of a real-life objective or activity in your company. Every emulation includes a focus on customer engagement—because, ultimately, everything begins and ends with your customer.

COURSE DESCRIPTION

Customer Emulations are immersive, multidimensional experiential exercises that put participants through a real-life process, challenge, initiative or project within your firm. Your employees emerge with a full understanding of what your company does, how it generates cash, how decisions are made, and how your company develops leaders. In addition, a focus on customer engagement ensures that no matter what specific objective your organization chooses for this program, participants gain a greater awareness of their own connection to your customer.

Customer Emulations are completely customized and are suitable for organizations in any industry that seek to connect business strategy to day-to-day operations and allow their employees to become more fully engaged in realizing the company's vision. They are highly applicable, for example, in a company that has recently launched a major growth initiative, gone through an acquisition, or expanded into new markets.

Spanning three to five days, this program intersperses emulations with lectures, peer and trainer feedback, and debriefs to drive long-term learning. Using the three dimensions of traditional economic modeling, inbox/outbox leadership challenges, and one-on-one live role-play with faculty, participants work in groups to overcome obstacles and achieve intended goals. These emulations are operationally focused, and the economic models are tailored to your business. We use your real-world internal tools and processes as part of the emulation.

TRI brings its experience in working with hundreds of companies and its knowledge of collaboration, decision-making with incomplete information, and other areas to add value in this experience.

PARTICIPANT OUTCOMES

- Comprehensive understanding of your company's business processes, revenue generation, profit-building strategies, and other critical business components
- Better awareness of their own leadership and strategic business strengths and weaknesses as well as those of their colleagues, and the tools to improve both
- Advanced business acumen in areas such as customer relations, negotiations, decision-making, and strategy formulation and execution
- The ability to anticipate business environments through exposure to stressful situations that demand innovative and critical thinking, complex decision-making, forecasting, risk mitigation, and dealing with unexpected circumstances
- Recognition of their role in championing the company culture and values

THE DISCOVERY PROCESS & PROGRAM DEVELOPMENT

A typical development cycle takes several weeks and begins with a multistep discovery process to identify and align the program learning elements to your current business realities. We meet first with your learning leaders to identify what analysis, if any, has been done to date and what the overall objectives of the program are. Next, we identify key subject-matter experts within the relevant functions (finance, human resources, operations, compliance, marketing, IT, etc.) and conduct interviews with each. Finally, we summarize our findings and develop a detailed proposal for the creation of the learning experience.

THE EMULATION

All participants prepare in advance with an emulation reading assignment and familiarization with the case. Upon arrival, a pre-course introduction lays out the emulation ground rules and introduces the components of the case. Participants are assigned to teams of five or six people. Teams then meet to share impressions from the pre-course reading, declare a personal development objective, and define and assign roles within the emulation. Teams are given time to develop and document their strategy for success. TRI integrates lecture, reflection, and experiential elements in its emulations to create a holistic learning experience. Organizations can opt to add a pre-course webinar to set participants' expectations for the experience.

There are several components to the Customer Emulations experiences, depending on what specific business process is being featured in the emulation. Among them:

- Economic models that demonstrate the major financial drivers of how your business runs so that participants develop fundamental business acumen.
- Emulations based on your specific business processes (examples: customer acquisition, risk management, financial planning and analysis) that drive critical thinking based on real-world business challenges.
- Live role play with the TRI faculty, allowing us to insert emotional and rational situations into the program to challenge teams and fuel on-demand behavioral and cognitive learning. Our experienced faculty can dynamically adjust the level of intensity, depending upon the teams' ability to absorb the content.

Interspersed throughout are opportunities for leaders and subject-matter experts to address a variety of subjects in open plenary sessions.



BUSINESS LEADER REVIEWS

Reviews take place throughout the exercise and at the close of the emulation experience. They are facilitated by senior leaders from your organization, who contribute to the entire learning experience. These reviews provide an opportunity for networking, exposing the participants to leaders with whom they may not otherwise interact. There can also be opportunities for leaders to evaluate participants, either individually, as a group, or both. These interactions are a critical element to help translate the emulation experience back to each participant's real-world role.

DEBRIEFS

At the conclusion of the exercise, the entire class convenes to discuss the performance of the competing teams. This gives participants an opportunity to compare and contrast leadership approaches, decisions taken, and obstacles overcome, and how they impact business outcomes. Depending on your preference, the session could end with a winner being named, based on a number of hard and soft criteria.

This debrief includes a discussion of how participants will implement their learning in their real-world roles. Leaders, managers and/or team members may set up informal post-program meetings to check on each other's progress, creating an ongoing support network. Optionally, TRI can add individual or team action-learning project modules to the emulation experience to measure the ability of the participants to translate their learnings to real-world applications.

REQUIRED RESOURCES

Room

- Main classroom
- Team breakout rooms
- Private faculty control room

Equipment/Supplies

- Projector and computer
- Computers, projector, plus assorted supplies (flipcharts, pens, paper, etc.)

Staff

- Faculty—two faculty members per 18 participants
- Executive op reviewers—one per team

SAMPLE TIMELINE

Business Risk & Industry Analysis

Creating a Quality Economic Win-Win

	Day I – October 1	Day II – October 2	Day III – October 3	Day IV – October 4	Day V – October 5	Day VI – October 6
MORNING		Welcome <hr/> Commercial Finance <i>"Past, Present & Future"</i> <hr/> Teaming for Results	Case Study, continued <hr/> What are the Issues & Characteristics of a Good Credit Proposal?	Experiential Exercise <i>Team Meeting I</i> <i>Customer Meeting I</i> <i>Team Meeting II</i> <hr/> Pricing Model <hr/> Introduction to Risk Models	Experiential Exercise <i>Team Meeting II</i> <i>Customer Meeting II</i> <i>Team Meeting III</i>	Deal Review II <i>Meeting with Commercial Finance Committee</i> <hr/> Teams Prepare for Debrief <hr/> Team Presentations Share Learnings and Exercise Debrief
	AFTERNOON	Financial Credit Analysis <hr/> The Deal Process <hr/> AMT <i>"Case Study in Asset-Based Lending"</i>	Industry Information Resources <hr/> Environmental Policy Training <hr/> Selling Process <hr/> Market Pricing	Experiential Exercise <i>Team Meeting II</i> <hr/> Commercial Finance Cash Flow Model <hr/> <i>Prepare for Deal Review I</i>	Experiential Exercise <i>Customer Meeting II</i> <i>Team Meeting II</i> <i>Prepare for the Deal Review II</i> <hr/> Personal Time	Course Wrap-up
		Arrival and Dinner	Case Study, continued <hr/> Team Evaluation I	Individual Reading for Experiential Exercise <hr/> Drama <i>"Meet the Customer"</i> <hr/> Experiential Exercise <i>Team Meeting I</i>	Deal Review I <i>Informal PIC Committee</i> <i>Customer Meeting I</i>	

"Underwriting, credit analysis, and account management were core competencies for GE's Commercial Finance business. TRI Corporation's Business Risk and Industry Analysis class was instrumental in developing these competencies for our employees and distinguishing our company from others. I worked with the TRI team to customize this highly interactive and experiential learning experience to ensure participants developed these skills for our business and had fun at the same time! It was always a pleasure and quite the learning experience for everyone!"

– Beth MacKay, Senior HR Business Partner, GE Commercial Finance