



## Management Mastery Program

**Mission: To empower managers with the knowledge and experience they need to succeed by providing access to relevant education and experts, a supportive community, and accountability partners.**

- We believe organizations thrive when their critical personnel is supported with access to experts, educational resources, and a strong ops system.
- The management mastery program is designed for early and mid-career managers.
- Facilitated by industry experts, the course uses interactive workshops and hands-on exercises to expand your operational knowledge with practical implementation. The coursework covers organizational management, workflow optimization, leadership strategies, and more.

### Program Structure

- A 6 month program with 2 monthly meetings
  - Interactive workshops featuring a different guest speaker on tactical operations, team building, or leadership skills.
  - A second meeting will include homework review, peer feedback, and group discussion.
- 2 hours of monthly practical implementation outside of the monthly meeting
- Increased support and impact with 1-on-1 coaching
- Community group to facilitate discussions

### Benefits

- Consistent internal growth for operations & organizational structure
- Improved workplace culture
- Consistent decrease in internal chaos
- Ability to manage more work with greater ease and more effectiveness
- Access to resources that support growth
- Develop peer relationships with other organizations at similar growth and friction points

[APPLY HERE](#)



# Business Accelerator Program

## Course Syllabus

---

<b>About the Small Business Accelerator Program.....</b>	<b>2</b>
<b>Ideal Participants.....</b>	<b>2</b>
<b>Module 1: Strategic Organizational Foundations.....</b>	<b>4</b>
Session 1: Establishing your Mission, Vision and Values.....	4
Session 2: Developing a Good Theory of Change, Metrics of Success, KPIs and OKRs.....	4
Session 3: Creating Your Presence with a Strategic Branding and Marketing Plan.....	5
<b>Module 2: Creating Sustainable Organizational Growth.....</b>	<b>6</b>
Session 4: Understanding and Optimizing Your Workflow and Growth.....	6
Session 5: Smart Hiring and Onboarding.....	7
Session 6: Effective Project Management.....	7
<b>Module 3: Growing a Healthy Team.....</b>	<b>8</b>
Session 7: Maximizing Personal and Team Productivity.....	8
Session 8: Developing a Healthy Culture with Effective Communication.....	9
<b>Module 4: Growing Your Impact.....</b>	<b>9</b>
Session 9: Board Governance and Critical Partnerships - Finance, Legal, HR, Advisors.....	9
Session 10: Fundraising.....	10
Session 11: Leading with Uncertainty; Smart Decision Making.....	11
<b>Capstone Project.....</b>	<b>12</b>
Session 12: Putting it all Together - Creating a Good Business Plan.....	12
<b>Testimonials.....</b>	<b>13</b>
<b>What Makes Our Programs Different.....</b>	<b>15</b>
<b>Impact Surveys.....</b>	<b>16</b>
<b>Logistics: Application Process, Tuition, and Schedule.....</b>	<b>17</b>
Applying.....	17
Tuition.....	17
Certification.....	17
Schedule.....	17
<b>About WorkStream Business Systems.....</b>	<b>18</b>

### About the Small Business Accelerator Program

Welcome to our comprehensive small business accelerator program, designed to empower small leaders and operations professionals in achieving their organizational goals. Throughout this course, participants will embark on a journey covering essential aspects of organizational management, including foundations, process optimization, growing impact, and leadership strategies. This will strengthen the organization's development and help it grow well, while upskilling the participants in the program.

Beginning with the core principles of mission, vision, and values, participants will learn to define and measure success through metrics, KPIs, and OKRs, and develop a strategic branding and marketing plan. The course will then explore understanding and optimizing workflows for growth, smart hiring and onboarding, and effective project management. Next, the focus shifts to maximizing personal and team productivity and fostering a healthy organizational culture. In the subsequent modules, emphasis will be placed on critical partnerships in finance, legal, HR, and advising, sales, and leading with uncertainty and smart decision-making, culminating in the capstone project of creating a comprehensive business plan.

Each session will be facilitated by experts in the field, employing interactive workshops and hands-on exercises tailored to the needs and challenges of small businesses, along with a targeted reading list. By the end of this course, participants will not only possess the knowledge and skills required to lead their organizations effectively but also have actionable plans tailored to their unique organizational context and a certification from us to prove completion.

### Ideal Participants

We have found that the following metrics are key indicators of whether a participant is likely to succeed in this program. If you don't meet these qualifications, we can still help you through our coaching programs. It's important to make sure that you're a good fit for whatever programs you engage in. The ideal participant should meet the following criteria:

#### Growth Mindset:

- **Committed to Continuous Personal Growth:** Exhibits a strong desire for self-improvement and professional development
- **Open to Critical Feedback:** Welcomes constructive criticism as a means of skill improvement and growth
- **Peer-Supported:** Appreciates the insights and perspectives of fellow participants to enhance learning, and can contribute to a peer discussion
- **Demonstrates Vulnerability:** Willing to openly share challenges and experiences to foster deeper connections and understanding

- **Aligned with Organizational Goals:** Committed to applying the fellowship's teachings for the betterment of their organization and the greater good

### Fellowship-Readiness:

- **Actively Working within an Organization:** Engaged in a role where the fellowship's teachings can be directly applied
- **Growing Organization:** Working in an organization that is expecting or experiencing growth
- **Lacking Formal Business Training:** This program is designed for those without a traditional business background and who are eager to learn essential organizational skills. People with formal training will find this program redundant.
- **Able to Commit to a Year-Long Program:** Ready to invest the time and energy required for a comprehensive and transformative experience

This program is NOT for you if:

- You don't want to commit the time (estimated 6 hours per month)
- You're not ready to be vulnerable with peers, whom you won't know well in the beginning
- You don't have a clear idea of how this program will help your career
- You're not currently working with an organization in a leadership role
- You're not available during the hours of the program (11 AM - 12:30 PM EST)

We do offer individual coaching programs that may be a better fit for you if any of these conditions apply. We are also working to develop relationships with other organizations that may be a better fit (such as better hours or less homework).

### Module 1: Strategic Organizational Foundations

In this beginning module, we'll explore the foundations that are critical for success in any organization.

#### Session 1: Establishing your Mission, Vision and Values

Developing clarity for your organization's mission, vision and values means that you're better equipped to make decisions and act on priorities that align with your organization's core objective. This session serves as the bedrock for organizational alignment and strategic planning, setting the stage for effective operations.

Key concepts include:

- **Mission and Vision:** Understand what an organizational mission and vision are, how they differ, and how to define them for your organization.
- **Organizational Values:** Learn why they are important, and how to create and define them for your organization.

Skills participants will gain:

- Defining mission, vision and value
- Defining activities by their alignment with the organization's objectives

By the end of this session, participants will be able to identify which activities support their organizational growth, which are distractions, and be able to identify priorities within the organization.

#### Session 2: Developing a Good Theory of Change, Metrics of Success, KPIs and OKRs

Having a clear theory of change and well-established metrics, KPIs, and OKRs is pivotal for organizational clarity and growth. This session builds on the foundational principles and guides you in creating transparent and actionable measures for success.

Key concepts include:

- **Theory of Change:** Understand what it is and how to create one for your organization.
- **Key Performance Indicators (KPIs) and Objectives and Key Results (OKRs):** Learn how to accurately define, create and utilize KPIs and OKRs to track and achieve organizational goals.
- **Metrics of Success:** Learn how to establish effective metrics that align with your mission, vision, and values.

Skills participants will gain:

- Crafting a clear theory of change
- Developing well-defined KPIs and OKRs
- Creating aligned and actionable success metrics for your organization

By the end of this session, participants will have a robust framework for tracking and evaluating progress, ensuring that all organizational activities are aligned with achieving the intended impact.

### **Session 3: Creating Your Presence with a Strategic Branding and Marketing Plan**

In this session, we will delve into the crucial role that branding and marketing play in growing your organization's presence and expanding its reach. Building a recognizable brand and implementing a strategic marketing plan are vital to attracting donors, partners, and supporters to your organization. This session will guide you through the process of defining your brand's identity and leveraging marketing techniques to expand your reach and impact.

Key concepts include:

- **Branding Essentials:** Understand what branding is, how to define your brand's identity, and the importance of consistency in visual and messaging elements.
- **Marketing Strategies:** Learn how to create and execute a marketing plan that aligns with your organization's goals, target audience, and resources.
- **Integration with Growth Plans:** Learn how branding and marketing fit into your overall organizational growth and development.

Skills participants will gain:

- Developing a cohesive brand identity
- Creating and implementing a targeted marketing plan
- Aligning branding and marketing with organizational growth strategies

By the end of this session, participants will have a comprehensive understanding of how to create a strong brand presence and utilize effective marketing strategies to grow their organization's reach and impact. This knowledge will empower them to attract both donors and supporters, ensuring a thriving community around their cause.

## Module 2: Creating Sustainable Organizational Growth

Learn how to create sustainable growth in your organization through learning about workflow and growth management, smart hiring practices, and effective project management techniques.

### Session 4: Understanding and Optimizing Your Workflow and Growth

This session equips participants with the tools and insights necessary to drive true organizational growth. Building on the mission, vision, and metrics established earlier, attendees will delve into the intricacies of their current processes and workflows. Expert facilitation will guide attendees through hands-on activities to thoroughly analyze and enhance their workflows.

Key concepts include:

- **Growth Strategies:** Understand the different types of organizational growth, and what that practically means for your organizational strategy.
- **Scalability:** Learn how to truly scale your organizational impact.
- **Workflow Analysis and Optimization:** Develop an understanding of your organization's workflow as well as strategies to optimize impact.

Skills participants will gain:

- Developing a growth strategy for growing and scaling impact
- Analyzing and optimizing workflows
- Creating clear and aligned job descriptions that match the organizational strategy and workflow

By the end of this session, participants will have mastered the skills to drive organizational growth, aligning growth strategies with their mission and vision. They'll have the tools to analyze and optimize workflows, implement growth plans, and create specific job descriptions that meet their organization's unique needs, laying the foundation for future effectiveness and impact.

### Session 5: Smart Hiring and Onboarding

In this session, participants will delve into the intricate process of designing a hiring strategy that aligns with their organizational needs and values. From crafting insightful job descriptions to creating an integrative onboarding plan, participants will learn how to attract quality employees and set them up for success.

Key concepts include:

- **Smart Hiring:** Learn to develop a hiring process that resonates with your organizational needs and attracts the right talent.
- **Effective Onboarding:** Create an onboarding strategy that smoothly integrates new hires, defines expectations, and promotes early success.

Skills participants will gain:

- Designing a hiring process tailored to organizational needs
- Crafting clear and effective job descriptions
- Building an integrative onboarding plan to set new employees up for success

By the end of this session, participants will be empowered with the knowledge and tools to hire smartly and onboard effectively, ensuring that new team members align well with the organizational culture and objectives. This holistic approach to hiring and onboarding ensures that the right talent is recruited and retained, contributing to long-term growth and impact.

### Session 6: Effective Project Management

In this session, participants will learn to master the essential tools and techniques for effectively managing projects within their organization. From defining SMART goals to managing stakeholder relationships, attendees will discover the strategies needed for project success.

Key concepts include:

- **Project Charter:** Learn what a project charter is and how to apply it to your organization.
- **SMART Goals:** Understand the principles of setting Specific, Measurable, Achievable, Relevant, and Time-bound goals.
- **Stakeholder Integration:** Learn how to effectively communicate with stakeholders and integrate them into the project management process to optimize project success.



Skills participants will gain:

- Creating a working project charter
- Applying best practices to ensure project success
- Developing strategies for effective stakeholder interaction and integration

By the end of this session, participants will walk away with a working project charter and a comprehensive template of best practices, ready to be implemented within their organization to achieve successful project outcomes.

### **Module 3: Growing a Healthy Team**

Gain the knowledge and skills to boost productivity while laying the foundation for a healthy organizational culture, combining efficient work practices with emotional intelligence and transparent communication to create a thriving environment.

#### **Session 7: Maximizing Personal and Team Productivity**

In this session, participants will learn essential strategies to maximize personal and team productivity within their organization. Through insights into automation, technology implementation, and personal habit formation, this workshop offers practical tools to enhance efficiency and align everyday operations with the organization's mission and goals.

Key concepts include:

- **Technology & Automation:** Learn how to identify and apply technologies and automation techniques that can elevate personal and team productivity.
- **Personal Productivity Habits:** Discover methods for creating and sustaining positive personal habits that contribute to overall success.

Skills participants will gain:

- Implementing technology and automation strategies tailored to your organization.
- Developing personal habits that reinforce and contribute to team productivity.

By the end of this session, participants will have successfully implemented techniques to maximize their personal and team productivity. The blend of technological insights and personal growth strategies offered in this session will pave the way for increased efficiency and a more effective approach to achieving organizational goals.

### **Session 8: Developing a Healthy Culture with Effective Communication**

Developing a healthy culture not only enhances the workplace environment but is also a vital contributor to the overall success and sustainability of an organization. In this session, participants will learn how to craft a concrete action plan for nurturing a healthy organizational culture, emphasizing transparency, vulnerability, and clear communication techniques.

Key concepts include:

- **Relationship Foundations:** Building trust and empathy within teams
- **Transparent Communication Protocols:** Implementing clear and open communication strategies
- **Healthy Culture Development:** Understanding the roles of vulnerability, mutual understanding, and of providing support

Skills participants will gain:

- Creating a culture development action plan
- Establishing clear communication protocols
- Fostering relationships that encourage vulnerability, support and empathy

By the end of this session, participants will possess a thorough understanding and actionable plan for cultivating a healthy culture within their organization. This essential groundwork lays the foundation for a thriving workplace that resonates with the organization's core values and vision.

## **Module 4: Growing Your Impact**

Amplify your organization's reach and effectiveness by understanding and leveraging critical partnerships, branding, marketing, and fundraising strategies.

### **Session 9: Compliance and Critical Partnerships - Finance, Legal, HR, Advisors**

In this session, participants will explore the necessity of forging critical partnerships with various experts to fill knowledge gaps, foster organizational growth and maintain compliance. Recognizing that no one can be an expert in every field, this session highlights the importance of aligning with the right partners in finance, legal, HR, and other areas to avoid common pitfalls and compliance issues.

Key concepts include:

- **Understanding Critical Partnerships:** Identifying the types of talent partners needed for different aspects of organizational management
- **Avoiding Common Pitfalls:** Recognizing potential problems and knowing when to seek expert assistance
- **Budgeting for Expertise:** Understanding the expected expenses and considerations for working with external partners

Skills participants will gain:

- Identifying and engaging necessary talent partners for organizational success
- Recognizing potential challenges and avoiding them through expert collaboration
- Creating an actionable plan specific to their organization to work with finance, legal, HR, and other advisors

By the end of this workshop, participants will not only have a comprehensive understanding of the essential partnerships required but will also have an actionable plan tailored to their organization's unique needs. This strategic alignment with expert partners ensures a solid foundation for compliant, efficient, and successful organizational growth.

### Session 10: Sales

In this crucial session, participants will dive into the art and science of effective sales, an essential activity for any small business. Acknowledging that the ability to generate sales is a fundamental responsibility of business leaders, this session will provide attendees with the expertise to craft a strong sales plan that is in harmony with their brand, marketing efforts, and overarching growth strategy.

Key concepts include:

- **Sales Fundamentals:** Grasping the core elements of sales and how it integrates with the business's overall objectives
- **Creating a Sales Plan:** Step-by-step instructions on formulating a strategic and actionable plan customized to the business's unique demands
- **Leveraging Branding and Marketing:** Applying branding and marketing principles to bolster sales initiatives

Skills participants will gain:

- Developing a compelling sales strategy that engages potential customers
- Integrating branding and marketing concepts into the sales strategy
- Implementing the sales plan within the organization's existing structure and goals

By the end of this session, participants will have an actionable sales plan that integrates with the organization's growth strategy, branding, and marketing. This alignment equips them to drive sales efficiently and sustainably, supporting the organization's mission and long-term success.

### **Session 11: Leading with Uncertainty; Smart Decision Making**

In this session, participants will explore the complex landscape of leading under uncertain conditions and making intelligent decisions that align with organizational goals. Recognizing uncertainty as a constant, this session will equip attendees with strategies to navigate ambiguity and make informed, smart decisions.

Key concepts include:

- **Leading with Uncertainty:** Learn how to adapt and lead in an ever-changing environment and embrace uncertainty as a component of leadership.
- **Smart Decision Making:** Understand frameworks and strategies for making intelligent decisions, even when faced with incomplete information.

Skills participants will gain:

- Applying decision-making frameworks to solve real-world problems
- Risk assessment and scenario planning techniques to assess uncertainty and benefits
- Make decisions to lead the organization with more confidence and with alignment to the organization's purpose

By the end of this session, participants will be equipped to lead with confidence in uncertain situations and make smart decisions that enhance organizational resilience and success.

## Capstone Project

### Session 12: Putting it all Together - Creating a Good Business Plan

In this final session, participants will synthesize the skills and insights gained throughout the session to craft a comprehensive and actionable business plan. A well-designed business plan not only guides an organization's direction but also serves as a vital tool for engaging stakeholders.

Key concepts include:

- **Building a Business Plan:** Understanding the essential elements that comprise an effective business plan.
- **Communicating Leadership Insight:** Learning to articulate the ability to lead, reflecting clarity and transparency in the organization's plans.

Skills participants will gain:

- Structuring a business plan that clearly articulates organizational goals
- Incorporating various elements from previous sessions to create a cohesive and actionable plan
- Demonstrating leadership's insight in a way that is accessible and transparent to various stakeholders.

By the end of this session, participants will have developed a well-rounded business plan that encapsulates the organization's vision, integrates the lessons learned throughout the session, and provides a solid foundation for future growth and success.

### Testimonials

Here's what some previous cohort participants are saying about the program:

**Toby Jolly, Impactful Government Careers:**

*The program that Deena and the team at Workstream Systems have put together has had an immediate positive impact on my work and my organization. The session on Mission / Vision / Value was particularly clarifying and changed how I talk about what we are doing. The experts she brings in each session have been really knowledgeable and the hands-on applied nature of the session makes the value of the content very apparent.*

**Beatrice Erkers, COO at Foresight Institute:**

*Other than just helping us get a clearer overview of everything that our organization does, and to both prioritize and improve on what we do, I also felt that it was very beneficial to me as an early career ops person because I learned how to develop structures for a more professional and antifragile organization that I will hopefully be able to apply to more organizations throughout my career."*

**Liav Koren, EA Canada:**

*I've been working with Deena for several months now. She's been very helpful and supportive; providing concrete, actionable suggestions to improve my work and focus. Her advice is well-calibrated and compliments my natural strengths well. It has been insightful. I'm very happy to have had the chance to work with her, and would absolutely recommend others do so as well.*

**Myriam Vanderzwalmen, Eurogroup for Animals:**

*This fellowship has been very helpful in my development. I have grown a lot in my role since starting these session. The 1-1 sessions further boost this development. I can see the impact of this training has on my role and the wider impact on the organisation as a whole. I also have a better understanding of my path for future career growth.*

**Anna Christina Thorsheim, Family Empowerment Media**

*I appreciated this fellowship as an effective way to discuss a number of topics that you think about as an entrepreneur. It's been helpful to talk to other fellowship participants and I've enjoyed the talks given. I specifically found it helpful to implement a project planning template presented in the fellowship. We now use this across all our projects, and I believe it is making it easier to coordinate and will enable us to scale up our impact faster.*



# Business Accelerator Program

## Course Syllabus

---

### **SoonKhen OwYong, Rethink Projects**

*For many EAs who do not have an operations or a management background, the fellowship can be a very useful upskilling exercise.*

### **Alex Rahi-Kaplan, EA NYC**

*The fellowship has helped to keep me accountable in developing practical skills for my current and future roles, and working with Deena has helped me to implement what I've learned.*

### What Makes Our Programs Different

We're not alone in the education, training and upskilling space. In fact, it's a pretty well-developed industry. Here's why we love our programs, and we hope you will too!

1. **Experiential learning.** We're big believers in gaining experience and knowledge through practice. None of our content remains theoretical - our curriculum is designed to be interactive so that you practice and implement what you're learning and therefore retain it better.
2. **Community.** One of our core beliefs is that people succeed better when they're in a group. They feel supported, perform better, and gain insights and alternative perspectives. Our programs are highly interactive as a group, so you'll develop good relationships and obtain insights from others in similar situations.
3. **Action and Accountability.** Expect to implement guidance, suggestions, and next steps as we work with you. We believe that growth only happens if you take action to encourage it. We'll recommend action items for you to take to make sure you're continuing your growth even when you're not directly interacting with us. We'll follow up with you to make sure that it's done, either in a group or individual session.
4. **Diversity of Expertise.** We bring in experts for each session because we want you to gain exposure to the best minds, advice, and perspectives on each topic. In programs where you have a smaller amount of speakers, you're restricted to the diversity of knowledge and perspective of those you're exposed to. We recognize that having exposure to experts in each area is critical for you to receive a well-rounded educational experience.
5. **Highly Individualized.** We included coaching into our program to ensure that each participant has an individualized experience based on their organizational needs. This facilitates the development of action items and steps towards growth that are specifically targeted to help **you**.



### Impact Surveys

For those who have participated in our programs so far, the qualitative data assessment suggests a substantial increase in organizational stability, impact and growth. Additionally, the participants (particularly those who paired it with coaching) displayed an increase in confidence, personal happiness, community connectedness, achievement, and a decrease in burnout and stress.



## Logistics: Application Process, Tuition, and Schedule

### Applying

- Please consider joining us for our information sessions: TBD
- To apply for this program, please fill out [this form](#).
- Applications are due by **April 26, 2024**
- After your application is reviewed, we'll schedule an interview with you to assess whether you'd be a good fit.
- Each cohort has between 8-12 participants.
- We will be running an introductory session for interested participants to get a feel for the program style before committing to the program. That session will be available to you after you've applied for the program but before you accept your spot.

### Tuition

- The full cost of the program (sessions and 1 coaching session per month) is \$7,500. This covers participation by up to 2 people from your organization.
- This is often something that your organization will cover as it benefits them to upskill their employees and develop their organizational infrastructure. If you're applying for funding, build this cost into your grant application. Ongoing education is a normal business expense.
- Tuition can be paid over the course of the program in monthly or quarterly installments. A 5% discount will be applied to any tuition paid in full at the start of the course.

### Certification

- Upon completion of this program, you'll be issued a certificate of completion. This will show future employers and funders that you have the experience necessary to lead impactfully.

### Schedule

- Sessions will be held twice a month from 11-12:30 EST.
- The first session of the month will be a session devoted to new content learning
- The second session will be dedicated for peer-reviewed homework, feedback and discussion
- Coaching sessions will be given once per month on the participant's schedule, between 10 AM - 4 PM EST
- The next cohort will begin in April 2024.

- In conjunction with WorkStream Business Systems, we have 2 other programs scheduled for 2024:
  - 6-month [Management Mastery](#), scheduled for February 2024
  - Non-profit [Organization Accelerator](#), scheduled for April 2024

## About WorkStream Business Systems

The mission of the WorkStream Business Systems is to put the “happy” back in management and help organizations function optimally. Part of our core beliefs include establishing access to education and expertise as a proven methodology to achieve results. This program was developed to give management support to help growing organizations, and help early and mid-career leaders gain the knowledge, tools and expertise to grow their organization and career. This program was developed by [Deena Englander](#), founder of [WorkStream Business Systems](#), director of [High Impact Alliance](#), and a Lean Six Sigma black belt. Deena will be the primary facilitator of the course, along with Patrick Liu as co-facilitator.