

A JACOBSON LEADERSHIP DEVELOPMENT RESOURCE



# BEYOND TECHNICAL ABILITIES: LEVERAGING SOFT SKILLS TO MAKE AN IMPACT

WORKSHOP AGENDA AND WORKBOOK



# BEYOND TECHNICAL ABILITIES: LEVERAGING SOFT SKILLS TO MAKE AN IMPACT

*Presented by JoJo Harris, Senior Vice President of Human Resources, The Jacobson Group*

NAME:

## DAY ONE AGENDA

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Welcome and Introduction

Activity: Project Considerations

Activity: Project Teams

Review and Debrief

*Please do not move ahead in this workbook until instructed to do so.*

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Using the provided Post-it Notes, write out the next steps or considerations associated with this project. Aim for at least 8-10 items, with each going on its own Post-it Note.

[illegible]

## ACTIVITY: EXAMINING PROJECT CONSIDERATIONS

Using the space below, place each Post-it Note in the appropriate category: tasks or people.

*TASK-FOCUSED*

*PEOPLE-FOCUSED*

## ACTIVITY: ASSEMBLING PROJECT TEAMS

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What soft skills do you need on the team?

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What technical skills do you need on the team?

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Who could be on your project team and what skills could they bring?

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## HOMEWORK

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What was the best project team you have been a part of?

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What made it great?

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What was the worst project team you have been a part of?

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What made it bad?

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## DAY TWO AGENDA

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Welcome and Refresher of Day 1

Homework Review

Activity: Stakeholder Analysis

Review and Debrief

*Please do not move ahead in this workbook until instructed to do so.*

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[illegible]

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# ACTIVITY: STAKEHOLDER ANALYSIS

Stakeholder	Interest	How to Engage <i>(Inform, Collaborate, Ask)</i>	Potential Impact <i>(Derail or Support; Low, Medium, High)</i>	Skills Needed for Engagement <i>(ex. Influence, Attention to Detail, Courage)</i>

## NOTES

[illegible]

## APPENDIX: SKILLS AND ATTRIBUTES

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These are just a few of the skills and attributes you may desire within your project team. Reference this list as you build your teams, and feel free to add your own skills to help ensure your team has a range of strengths.

Accountability

Influence

Adaptability

Innovative Mindset

Analytical Thinking Ability

Intellectual Curiosity

Attention to Detail

Interpersonal Savvy

Collaborative Ability

Leadership Aptitude

Communication Skills

Negotiation Skills

Compassion

Organizational Skills

Customer Focus

Problem Solving Ability

Courage

Relationship Management Skills

Data-driven Mindset

Strategic Mindset

Empathy

Technical Excellence

Growth Mindset

Time Management Skills

# APPENDIX: STAKEHOLDER ANALYSIS WORKSHEET

Stakeholder	Interest	How to Engage <i>(Inform, Collaborate, Ask)</i>	Potential Impact <i>(Derail or Support; Low, Medium, High)</i>	Skills Needed for Engagement <i>(ex. Influence, Attention to Detail, Courage)</i>

Insurance Talent

# JACOBSON

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