



CULTURE TRANSFORMATION AND CHANGE MANAGEMENT CAPABILITIES

678.806.3922
WWW.ICARUSCONSULT.NET

LET'S DEFY GRAVITY

About Icarus Consulting

Icarus Consulting, a veteran-owned consulting firm that specializes in helping organizations create inclusive cultures that leverage diversity and inclusion for a competitive advantage. We accomplish this by developing strategies which enable our clients to attract, develop, and retain highly skilled talent from an emerging diverse workforce and, at the same time, enhance the engagement, knowledge, and skill of current employees.

Icarus Consulting helps clients drive positive change in today's rapidly changing business landscape. Whether it's developing and delivering training on unconscious bias, establishing D&I councils, leveraging our proprietary BRG Leadership AcademySM to transform resource groups, launching executive learning programs, implementing mentoring programs, or coaching senior executives, emerging leaders or high potential employees, Icarus customizes solutions to resolve client's toughest challenges.

Icarus Consulting works with organizations to design and implement strategies that result in healthy cultures—often in the context of rapidly changing the market and industry conditions. The Icarus team is comprised of seasoned consultants with extensive operating experience in both the public and the private sectors. The firm serves clients across multiple industries, including Energy, Manufacturing, Consumer Products, Financial Services, Healthcare, Higher Education, Insurance, Life Sciences, Logistics, Public Health, Retail, and Technology.



Why Choose Icarus Consulting

Icarus Consulting is the world's leader in diversity and inclusion strategy.

Icarus Consulting is a unique advisory firm that helps senior-level professionals and their teams improve their performance and conquer their toughest strategic challenges. What sets Icarus Consulting apart is who we are and how we do what we do. We have built a boutique practice of professionals who have a strong sense of personal “calling.” We work at the intersection of business, mission, and humanity, bringing a point of view based on our own professional experiences and what we have learned from our clients. We partner with our clients to build customized solutions based on common sense, and our clients consider us trusted advisors... not just consultants. They trust us not only for our service but also for our deep personal investment in their success.

Every day we work with leaders to design, align, and implement a sound strategy, active organizational structures, and healthy culture - often in the context of rapidly changing the market and industry conditions. Our team is comprised of seasoned consultants with extensive operating experience in both the public and the private sectors. We serve for-profit and nonprofit clients across multiple industries, including Energy, Manufacturing, Consumer Products, Financial Services, Healthcare, Higher Education, Insurance, Life Sciences, Logistics, Public Health, Retail, and Technology. With a broad set of management tools paired with action-oriented advising and practical coaching, Icarus Consulting helps clients accelerate organizational performance by Clarifying strategic choices, improving organizational culture, creating more inclusive work environments, recognizing overlooked talent, strengthening leadership, guiding organizational culture development and navigating change.

Icarus Consulting is more responsive.

This mission of Icarus Consulting is to unleash the power of human potential, by helping people—and organizations—to defy gravity and fly. We help organizations to achieve excellence through inclusion by ensuring employees at every level in the organization valued, respected, and connected. We do that by assisting organizations in developing strategies to attract, develop, and retain highly skilled talent from an emerging diverse workforce and, at the same time, enhance the engagement, knowledge, and skill of current employees. With our help, organizations create the type of workplace where their people no longer feel pressure to downplay aspects of their identity to thrive and contribute in a way that fuels the organization's bottom-line growth.

We deliver cost-effective, vetted solutions.

We are faster at providing you with battle-tested solutions because we have the largest proprietary database in the industry and our in-house think tank – The Center for Solutions, Results, and Innovation (CSI) to conduct research.

Change Management and Culture Transformation Methodology

Beginning with this end in mind, Icarus Consulting will draw from the breadth and depth of our 10-plus years of global consulting experience—combined with our extensive, proven portfolio of best practices—to design, develop, and deliver a customized diversity and inclusion strategy and initiatives and to provide tools for sustainment, ensuring the D&I solution becomes not only permanent but transformational.

Icarus Consultants will be responsible for providing advice, counsel, and support throughout the engagement. Their role will be to ensure that your D&I strategy is aligned with best practices and leverages Icarus Consulting learning and experiences gained from other consulting engagements. The Consulting Team will include some or all the following roles through on-going consulting project initiative:

- Icarus Consulting CEO – works with the client CEO and direct reports, Board of Directors, advises on high-level strategy, alignment, and vision
- Consulting Team Leader – works with HR, and is responsible for guiding overall strategy formation, leading the implementation of solutions, ensuring outcomes are achieved
- Icarus Consulting Project Manager – provides quality delivery of all services, responsible for contractual arrangements, a conduit for the client resources
- Designer – creates tailored D&I solutions that achieve the desired client objectives and program outcomes
- Consulting Team – assists with various aspects of the Diversity & Inclusion strategy implementation
- Client Service Manager – project manager for the overall engagement, responsible for the day to day scheduling, coordination, and logistics

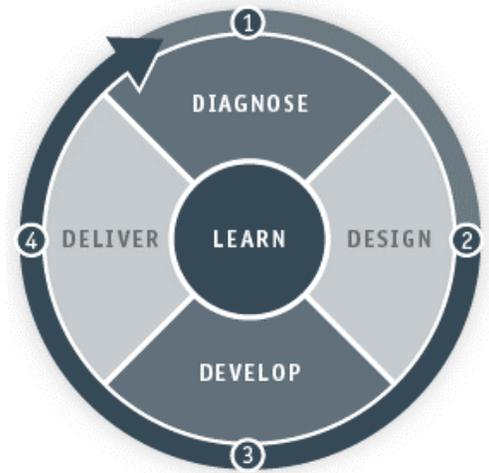


Consulting Expertise

Our Consulting Team teams include with professionals within the field of D&I who demonstrate the highest standards of inclusive and culturally competent communication, professionalism, and flexibility.

Consulting Customization Approach

Icarus Consulting follows the 4DL (Diagnose, Design, Develop, Deliver, and Learn) model for the design, development, and delivery of our services for each client. This comprehensive model—which we have used successfully for more than 20 years for content design, development, and delivery—will be adapted based on the client’s decision about the level of customization desired. We have outlined it below to illustrate our robust process for customization, co-branding, and curriculum development.



The 4DL model includes four phases: 1) Diagnose, 2) Design, 3) Develop, 4) Deliver, along with Learn.

Diagnose — Exchange ideas in conference calls with the design team

- Validate how a partnership with Icarus Consulting can meet the client’s leadership development needs
- Identify relevant challenges, obstacles, and logistics
- Expand our understanding of your audience and culture

Design — Conduct a brief initial design meeting

- Clarify learning objectives and priorities
- Review existing PPL training materials for key concepts to be integrated
- Brainstorm content ideas to meet the targeted goals
- Confirm design, review expectations, and define deliverables

Develop — Prepare the solution

- Customize the solution (training materials, PowerPoint slides, and any other products required for the D&I program)
- Provide status reports and client review cycles
- Deliver the pilot programs
- Conduct a short feedback session to the client’s initial impressions and suggestions for improvement (specifically, what worked, what didn’t work, and what might work better)

Deliver — Deliver the program

- Deliver program, process, practice
- Learn — Define areas of improvement by partnering with the client to gather data on the effectiveness of the program over time and define specific ways to improve or tailor the D&I program. As required by the RFP, Icarus Consulting will quickly and cost-effectively co-brand and customize.

**Coaching Expertise**

Icarus Consulting has an extensive background in helping organizations improve their internal communication efforts. These engagements focus on coaching leaders in organizations to address these issues in their communication endeavors.

- Stakeholder Analysis
- Adapting to and Engaging Differing Stakeholder Groups (Listener Preference Profile)
- Recognizing and Addressing Cultural Differences
 - ▶ Gender Differences: Biases and Preferences
 - ▶ Organizational Biases – Cultural and Organizational Norms

- The PR of Presentations (Power vs. Relationship)
- Meeting Facilitation
- Executive Presence
- Presentation Skills: Focusing on Impact
 - ▶ Verbal (words) Delivery
 - ▶ Vocal (tone/inflection) Delivery
 - ▶ Nonverbal Communication
 - Physical Delivery
 - ▶ Team Presentations
 - Handling Questions and Interruptions
 - Managing Conflict and Disagreement
 - Presentation Impact Scale
 - ▶ Five Stories All Leaders Need to Know How to Tell
 - ▶ Leveraging Theatre Training for Role Performance
 - ▶ Death by PowerPoint™



Communication Expertise

Icarus consultants have the communication expertise to guide leaders through development and implementation. Our clients benefit from our ability to identify communication needs, design communication plans, and industry best practices. The Icarus Consulting team has extensive experience in working with senior executives using proprietary Innovative Intelligence approaches and tools developed by our Center for Strategy, Innovation, and Results (CSI). Icarus consultants work with executives to enhance communication effectiveness and business results.

Our consultants are highly credentialed as experts in communication, training, and coaching.

Senior Communication Executives: Experience in all aspects of corporate communications. Areas of special expertise include strategic communications plans, crisis communications, community relations, philanthropic programs and internal communications.

Innovative Intelligence
- A Consulting Approach



Advisors to CEOs and Executive Leadership: Serve as a critical participant in corporate change and communication strategy development and implementation. Develop executive communication (written and verbal messages for internal and external audiences). Designs communications strategies for change and transformation initiatives and internal communications.

Provide One-To-One Coaching for Senior Executives: Handle communication issues such as executive presence, influencing more effectively, building collaborative work relationships, identifying and handling conflict, team presentations, etc.

Conduct Executive/Leadership Communication Assessments Including Behavioral and Quantitative Multi-Rater 360's: Collaborated with clients to select and administer assessment instruments to identify leadership communication strengths and areas for improvement. Used results as a benchmark to begin the transformational communication process. Created individual development plans with concrete actions and ongoing coaching support for Vice Presidents of the multinational insurance company.

Media Contact and Interview Skills: Provide Targeted Feedback to Top Executives. Serve as an objective voice to deliver feedback about strengths, blind spots, and areas for improvement to accelerate communication effectiveness and performance.

Communication and Listening Expertise: Served on the **communication** faculties of the following universities: Tulane University, Auburn University, Louisiana State University, Purdue University, Florida State University, Northern Arizona University, Loyola University, etc.

- Icarus Consulting Consultants are recognized as some of the most prolific writers in communication with international publications, including dozens of books and referenced articles.
- Serve as expert witnesses in communication and listening.
- Assessment tools such as the WATSON-BARKER Listening Test, The Listener Preference Profile, The Listener Styles Profile, and the Advocacy/Inquiry Skills Inventory are used internationally to enhance individual and team effectiveness



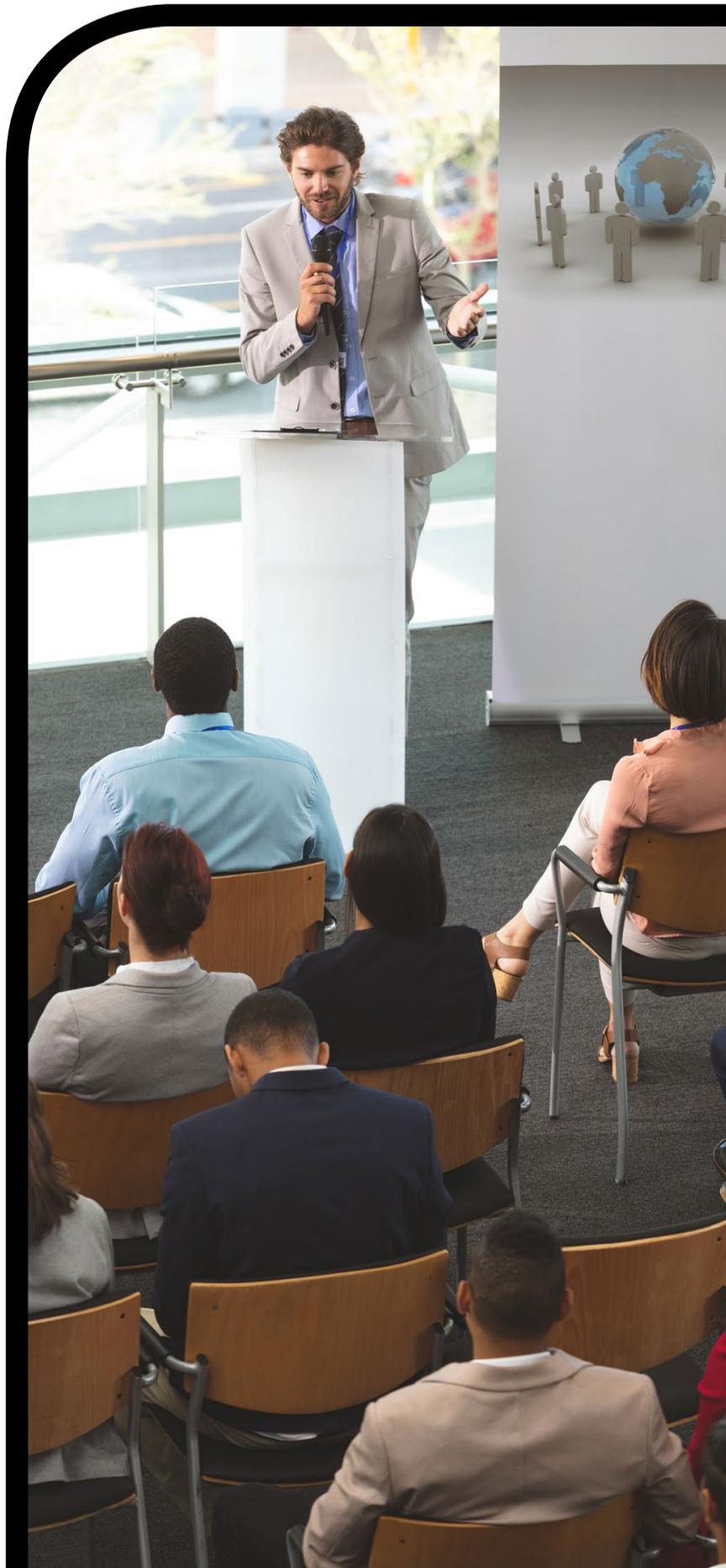
Project Approach

Icarus Consulting recommends a two-phase approach to this process. The first phase addresses the clarification of the mission of the client, based on company expectations, Icarus assessment findings, and best practice information. The output will be a preliminary organization design that will address those expectations. It will also address the fundamental issue of cost versus benefit of the function.

The second phase will determine the finite design of the organization, including final structure, staffing requirements, and other limited design components.

It is recommended that the work be carried out by a cross-functional team, to be named by the client. The work of the team will be facilitated and guided by the Icarus consultants as required. However, if there is a need to move quickly on a project, Icarus can modify its approach. There is a speed advantage to be had by having some of the work carried out by the consultants and reviewed by the client's internal team, and other steps carried out by the client's internal team.

The following is a description of the work required to carry out phase one, and a brief overview of step two, which will be more clearly defined based on the outcomes of stage one.



Project Process

Start-up – team launch

- Set the context for the design team, introduce charter, expectations, present plan and processes, determine working processes and initial assignments
- Output – Design plan, assignments, direction, and expectations of the team
- Process – Facilitated structured meeting with the design team
- Consulting time – 1 day for materials development and one day each for two consultants – 3 days

Environmental scan

- Determine the requirements of the client organization based on the input of internal and external stakeholders.
- Outputs – Requirements for the design of the client
- Process – Structured process and interviews with internal stakeholders (corporate management) and customers, external stakeholders. Interviews are designed to address the design needs of the client.
- It will expedite the project if questions and the process are pre-developed by Icarus consultants, and presented to the team for review. Also, Icarus consultants are available to conduct interviews as required based on the availability of client team members. After the interviews are completed, there is a data review with the team, although that step may be combined with another activity.
- *Consulting time – 1 day to develop the interview process and questions plus one day to brief the team and two consultant days to debrief results. If consultants are used to conduct the interviews, these would be additional days*

Benchmarking

- Identifying best practices in the client's industry or line of business to set target performance and measures, and to guide organization decisions regarding structure, competency requirements, staffing, technology applications, and processes.
- Outputs – Set of criteria for the client organization that reflects best practices, delivery systems, culture, organization, technology, processes, structure, reporting relationship, within the context of the requirements of the client
- Process – Develop benchmarking process and criteria and identify sources of contact for best practices information. Conduct interviews, surveys, and research to obtain best practices information. To expedite the process, a straw model will be developed for presentation to the team for review.
- *Consulting time – Develop process and criteria, review with the team – 2 days. (Icarus is available to conduct the interviews and research; however, it is difficult to estimate at this time how many days are required.) Debrief benchmarking information with the design team and develop requirements for the design 1 – 2 days*

Relationship Mapping

- High-level inventory of the vital business processes in the client organization, and the degree to which they add value.
- Process – Consultant led the meeting with members of the client who are knowledgeable of the business processes.
- *Consulting time – 1 – 2 days for the meeting, one day for documenting results. Total three days (may be combined with other work)*

System Analysis

- Identification of the information and resource requirements of the client
- Process – Structured Input Analysis interviews with members of the client's management team
- *Consulting time – 1 day (may be combined with other work)*

Interaction Analysis

- Identification of the critical organizational relationships and boundaries needing to be managed for the client.
- Process – Structured Interaction Analysis interview with members of the client's management team
- *Consulting time – 1 day (may be combined with other work)*

Strategy Conclave

The development of the preliminary organization design of the client

Outputs – Preliminary organization design recommendations, including

- Mission and charter for the client
- Organization structure
- Major functions
- Key performance measures
- Customer expectations
- Desired culture
- Technology and key process applications



- Boundaries and boundary management within the client
- Cost versus benefit bases
- Competency requirements for key leadership positions

Process – Two days facilitated meeting led by Icarus consultants during which the data from the assessment processes are shaped into organizational requirements, and an organization is designed to meet the requirements

Consulting time – Pre-analysis of data and preparation of materials – 2 days; facilitating meetings – 2 consultants two days each. Documentation of design – 1 - 2 days Total eight days.

Management Presentation

- Present to management the organization recommendation for review before finalization and implementation
- It is also possible that interim management update meetings would be required; however, it is not clear what role the consultants may play in these.
- *Consulting time – 2 days*

Icarus Guiding Principles and Code of Conduct

These are essential considerations in and of themselves, and particularly considering the recent assessment findings. While there is a desire to move very quickly on this piece of work, some of the information required for completion, and identification of participants, may not be available until work from earlier stages are completed.

There is an opportunity to employ a full participation event that will also serve to build teamwork and address some of the trust issues. However, it is advisable to hold this until a first cut at the organization functions and employee population have been determined.

Also, it is crucial to confirm the desired culture from top management's perspective and incorporate findings from the benchmarking and environmental scans, as part of this process.

It is expected this will be carried out overlapping the end of phase one and beginning of phase two.





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