



BLUE STONE
STRATEGY GROUP

**ANNUAL TRAINING
TENTATIVE AGENDA
San Diego, CA
Location TBD
May 9, 2014**

Friday May 9th @ 9 AM - Focus on the Blue Stone

- 9:00 - 9:45 Welcome & Introductions
- Objective: Identify your path to Blue Stone?
 - Overview: Re-education of Blue Stone History (*Jamie F.*)
 - Founding Story
 - Mission & Vision
 - Governance & Economic Development
 - Accountability and what that means to leadership
 - Where we are going for 2014
 - Overview of Agenda (*Tim K*)
- 9:45 - 10:45 Module 1: 2014 Growth Path - Regional Model
- Objective: Develop a clear understanding of path forward
 - Format: Presentation (*John M.*)
 - Topics
 - Regional Expectations
 - Growth Expectations
 - Outcome
 - Each individual should be up to speed
 - Why they were important and what was critical to their success
- 10:45-11:00 Break
- 10:45-12:15 Module 2: Role Play - Blue Stone in a nutshell
- Objective: Convey what Blue Stone does in 2 minutes
 - Overview (*Tim K.*)
 - Why this is important
 - Facilitator to give example
 - Exercise: BSSG Introductions
 - Format
 - Refer to M2 exercise sheet: pair up practice, then switch and do again.
 - Select "best of" to share with broader group

- Facilitators in each group to give constructive feedback
 - Background
 - Our mission
 - Our vision
 - Our products
- Outcome
 - Each team member will be able to give a good 2 minute overview of BSSG
 - Each team member will be able to incorporate a follow up question at the end to obtain contact information or to schedule a 30-minute introductory call

12:15-1:15 Small Group Lunch

1:15-3:00 Module 3: Role Play - Blue Stone Service Offerings

- Objective: Explain Blue Stone Service Offerings, “what” Blue Stone does,” with examples and lock in a 30 minute follow up call
- Overview (*Tim K.*)
 - What is the Blue Stone process to guide potential clients
 - Select Client Vignettes (Key slides or findings from actual client work)
 - Government
 - Tunica-Biloxi: Jacob B., Kim S., & Janeen G.
 - Yakama: Brian P. & Kim S.
 - Santa Clara: Tim K., Kim S
 - Economic Development
 - Huron: Tony F.
 - Isleta: John M., Tim K.
 - Warm Springs: Sam Penny, Tony F
- Exercise: Practice Client Stories
 - Format
 - Refer to M3 exercise sheet: break up into groups of 4 and practice role play where one is client and one
 - Select “best of” to share with broader group
 - Facilitators in each group to give constructive feedback
 - Topics
 - Example of government project that you participated in and one you did not
 - And
 - Example of economic development project that you participated in and one you did not
- Outcome
 - Find out what the client challenges are
 - Ability to clearly and concisely and explain our services

- Each team member will be able to incorporate a follow up question at the end to obtain contact information or to schedule a 30-minute introductory call

3:00-3:15 Break

3:15-4:45 Module 4: Practice Team - Problem Solving

- Objective: Understand “How” Blue Stone solves client challenges
- Overview (*Tim K.*)
 - Collaborative Problem Solving
 - Tools of the Trade: 3Cs
- How we get breakthrough Insights
 - Chitimacha - Enterprise
 - Jicarilla - Government Strategy
 - Laguna - Utility Strategy
 - Seminole - Enterprise
 - Seminole - Governance
- Exercise
 - Format
 - Refer to M4 exercise sheet: past client vignettes
 - Practice your first client project launch meeting
 - Each group presents to each other after one practice run
 - Facilitators in each group to give constructive feedback
 - Topics
 - Methods of analysis and research
 - Hypothesis driven problem solving = exercise - rapid fire 5 possible solutions to a current client problem
 - Work Planning
 - Preventing Scope Creep
- Outcome
 - Picture of how projects result in insightful answers to the client problems

5:30 Team Dinner



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Saturday May 10th @ 9 AM - Client Development

- 9:00-9:30 Opening reflections and refinements (John M)
- One question you still have & one key take away from yesterday
- 9:30- 10:45 Module 5: What Blue Stone does from Start to Finish
- Objective: Utilize learnings from day one into real time client simulations
 - Overview (*Tim K.*)
 - Format: *Refer to M5 exercise sheet*
 - Simulate introduction, 30 minute call, and project execution exercise
 - Topics
 - Elevator speech
 - Getting the 30 minute call
 - Planning and thinking through a project
 - Outcome: Snapshot of “What we do:” that each team member can explain

- 11:15-11:30 Break – heavy snacks
- 11:-30-12:45 Module 6: The Blue Stone Platform and Client Development
- Objective: Connect backend support with the client development process
 - Overview (*John M. and Nikishna*)
 - Presentation
 - Format:
 - Topics:
 - Name that client: 4 Stories of ‘How we got a Client’ PPT
 - IT back end
 - Client Development tracking (CRM type system)
 - Outcome: Understanding how Blue Stone converts contacts into clients
- 12:45 – 1:00 Closing Thoughts
- 1:00 Lunch and Team Activity