

Customer Session Guide

Small-Group Leadership Development

Your 75-minute session

Use this guide during your program for up to five leaders from one company. Bring your Pre-Call Worksheet. Your Post-Call/Meeting Recap will record the agreed plan after each session.

ROAR phase	Minutes	What you will do
Review	0-15	Review the last action, share relevant facts, and choose a useful outcome.
Opportunities	15-35	Explore practical approaches and learn one tool for the situation.
Actions	35-60	Rehearse the conversation or task, use feedback, and choose your next action.
Roadmap	60-75	Confirm owners, dates, evidence, support, and the next review.

How to participate

Use a real example or a fictional case. Ask questions, correct assumptions, and say when an action is unrealistic. Give others time to speak and keep feedback about observable words and actions. Do not repeat another participant’s private story outside the session.

Between sessions

Apply the agreed action at work and collect a simple example or measure. Ask the designated manager for the agreed support. Bring the result to your next session.

Before you leave

Read back the action, owner, due date, success measure, and review date. Confirm what may be shared with the employer and when you will receive the recap.

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Your program sequence

Session	Focus	Practice and take-away
1	Review and baseline	Define one business priority, one behavior, and the evidence to track.
2	Clear expectations	State outcome, owner, deadline, definition of done, and check-back.
3	Accountability	Practice addressing a missed commitment with facts and a renewed agreement.
4	Review and reinforce	Compare evidence, rehearse a difficult situation, and set the next roadmap.
5	Delegation	Agree on authority, support, decision limits, and check-in points.
6	Difficult conversations	Describe the observed behavior, explain the impact, listen, and agree on action.
7	Feedback and development	Give specific feedback and agree on a practice opportunity.
8	Consistency review	Compare evidence across situations and reset the plan.
9	Priorities and handoffs	Practice a handoff with acceptance criteria and escalation triggers.
10	Leading through change	Explain the change, invite concerns, and clarify what happens next.
11	Leader independence	Lead your own review, choose a tool, and work through a new scenario.
12	Final review and transfer	Document progress, remaining gaps, and the next 90-day roadmap.

30-day programs use sessions 1-4; 60-day programs use 1-8; 90-day programs use 1-12. Session 4, 8, or 12 is the closing review for your option. Topics may be adapted to the agreed business priority.

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Your practice notes during the session

Use a fresh copy for each session. Write short notes, rehearse aloud, and revise the plan after feedback. These are your working notes; the shared recap contains only agreed information.

Participant | date | session number | topic

Review: the situation, facts, and outcome I want

Opportunities: tool or approach I will use and why it fits

Actions: the words or task I rehearsed and feedback to apply

Roadmap: next action | owner | due date | evidence | support | review date