

March 13, 2013

David Littlewood  
President  
First National Bank McGregor South Bosque

David,

We appreciate the opportunity to present this proposal to you for leadership development and training for First National Bank McGregor South Bosque. It is exciting to have the opportunity to work with you and the leadership team at your bank.

After reviewing the information from our previous discussions regarding the development of the staff at First National Bank, we have come up a program outlined in this proposal for your consideration. We believe there is a significant opportunity for you to see significant growth in the leadership team in your company and 360Solutions is the partner to help you realize that potential.

Over the next twelve months we will assist you in transforming your team's high potential into high performance. In this proposal we will outline our strategy for how we will make that happen.

Chip Wilson  
CEO, 360Solutions

## **EXECUTIVE SUMMARY**

A partnership between First National Bank McGregor South Bosque and 360Solutions creates an ideal solution for your desire to develop the leadership team at First National Bank. 360Solutions is one of the nation's leading suppliers of comprehensive, varied and customizable professional training solutions. The company's efforts in the training and consulting industry, as well as previous work experience, demonstrate its capability and commitment to equipping the current leaders of FNB McGregor South Bosque with the training solutions needed to carry out the goals and vision of senior leadership.

Founded by CEO Chip Wilson, 360Solutions develops, designs, and delivers customized programs to help organizations, of all types, maximize their employees and processes to improve their performance. The company has a network of more than 500 "Strategic Partners" who facilitate training sessions to effectively educate executives, managers and employees on key strategies that lead to professional and organizational success. 360Solutions has built one of the largest libraries of training curricula in the industry. The training materials in this library cover a broad range of the topics and issues that are often neglected in organizations, yet make a profound impact on overall effectiveness. With such a variety of courses available, participants are sure to receive the crucial skills they need.

The fundamental principles of improving, motivating and empowering human resources are, to some extent, universal across diverse organizations and industries. However, 360Solutions applies necessary and appropriate customization to each training program to ensure specific programmatic outcomes. Industry-specific case studies along with the incorporation of input from First National personnel will guarantee the level of relevance and application that is needed for each training and development opportunity.

## GENERAL CAPABILITIES

360Solutions is a trusted business partner to the world's leading organizations with respect to human capital. Client and business partner relationships are shaped by a deep understanding of our clients' needs, a collaborative working style and a commitment to exceed client expectations. 360Solutions focuses on innovative ways to help clients reach their performance objectives and then combines that thinking with industry experience and research to know what really works. 360Solutions delivers practical ways to improve business by designing, communicating and managing highly effective programs.

## STRATEGIC PARTNER NETWORK

Currently, 360Solutions' Strategic Business Partner network consists of 500 professionals throughout the U.S. and 21 other countries. It is a diverse group of multi-cultural and multi-lingual independent business owners, skilled in delivering interactive, classroom-based training. The network of Strategic Partners aides in reaching geographically dispersed clients as certified partners.



## **THE NEED**

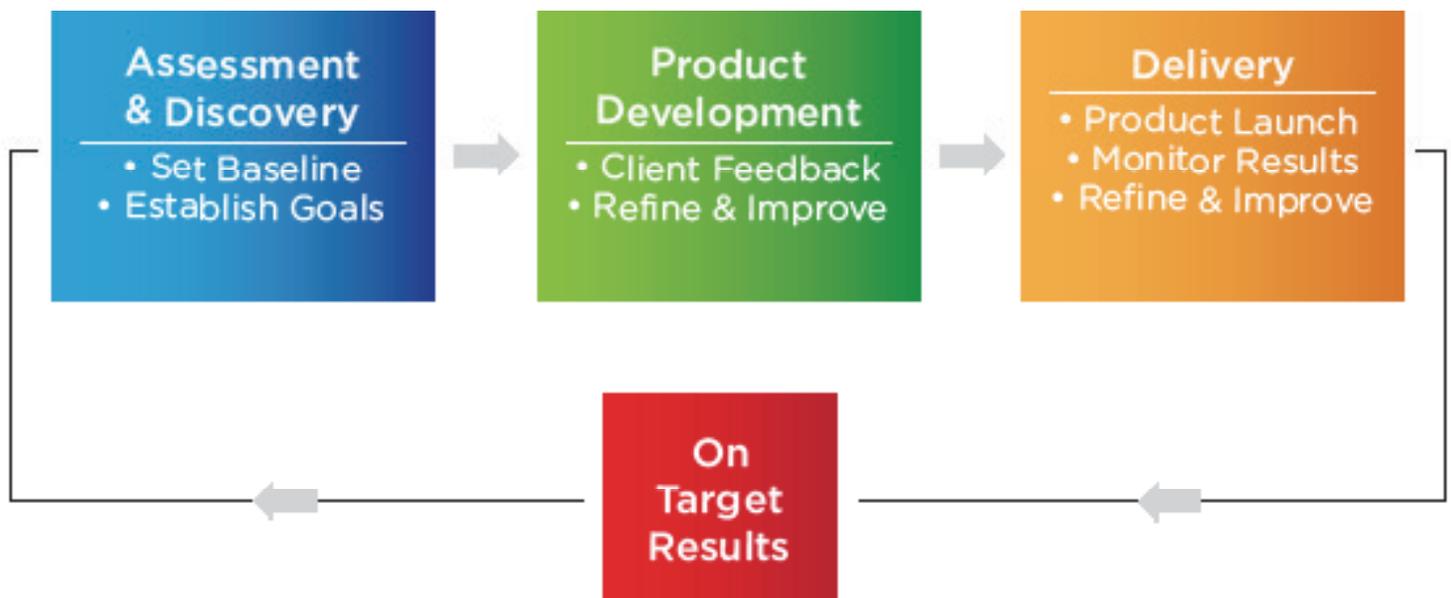
First National Bank McGregor South Bosque has a history of meeting customer demands for on time service and high quality product offerings. In addition, First National's vision for the future has brought upon the need for leadership training, development and coaching to accomplish its goals.

By partnering with 360Solutions for the purpose of content development and presentation design, First National will have an effective and comprehensive solution to realizing the potential of its leadership team and create a high performance organization. In addition, 360Solutions will utilize multiple learning models to create training course content that maximizes student retention and benefit.

To meet the goals and objectives of First National Bank McGregor South Bosque for the development of its leadership team, the following phases will be executed:

1. Baseline Measurement and Assessment
2. Two-Day Offsite Leadership Experience
3. Monthly One-Day Seminars

## OUR APPROACH TO WORKING WITH CLIENTS



**Step 1** - To design and implement a high performance leadership training program, we must start by understanding where the leadership team is at present. To accomplish this we need to do the following:

- Interview senior level staff
- Interview key leadership team members
- All participants take the P60 Personality Profile
- Review current processes before transformation off site

**Step 2** - 360Solutions will conduct a two day off-site leadership retreat designed to engage the First National leadership team in the Transformation Model. We will facilitate this event to be the initial step in transforming high potential into high performance.

**Step 3** - Continue with monthly one day leadership development seminars consisting of training and coaching for First National leadership team members.

## **THE ADULT LEARNING MODEL**

The general learning sequence we have tried to follow in many of the sections is to 1) introduce a topic, 2) have participants do some kind of activity relating to it, 3) debrief learnings and teach the main principle, and 4) apply the principles to their own lives, the organization, or back home. The Adult Learning Model builds repetition into the learning process; tell people what you are going to teach them, explain the actual principle, then summarize what they just learned.

We have built some repetition into the leader's guide instructions and workbook, but it is impossible to put it all in. So, when you begin a new topic, tell them what the new topic is, teach them the principle, and then, when you are finished, summarize the key points.

## **THE 70/20/10 LEARNING MODEL**

There are many adult learning models which can have great application in coaching and which could improve the client experience, knowledge retention, skill application and eventual goal attainment.

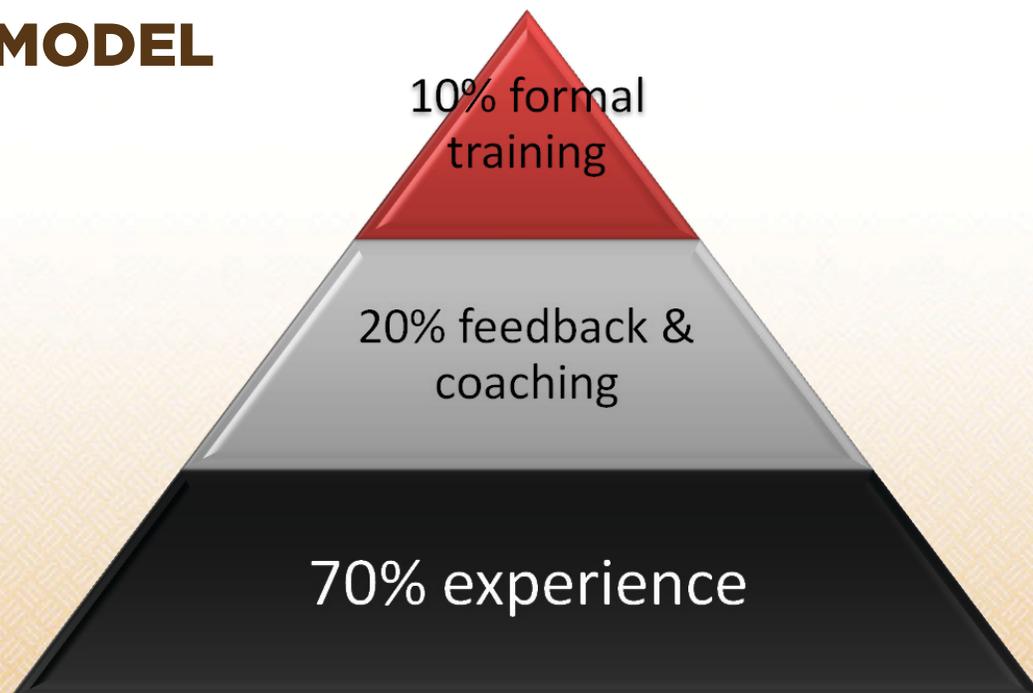
The two that my colleagues and strategic alliances find the most useful are the 70:20:10 Model of Adult Learning and the Ebbinghaus Forgetting Curve.

The 70:20:10 Model of Adult Learning stems from a significant amount of research that indicates that:

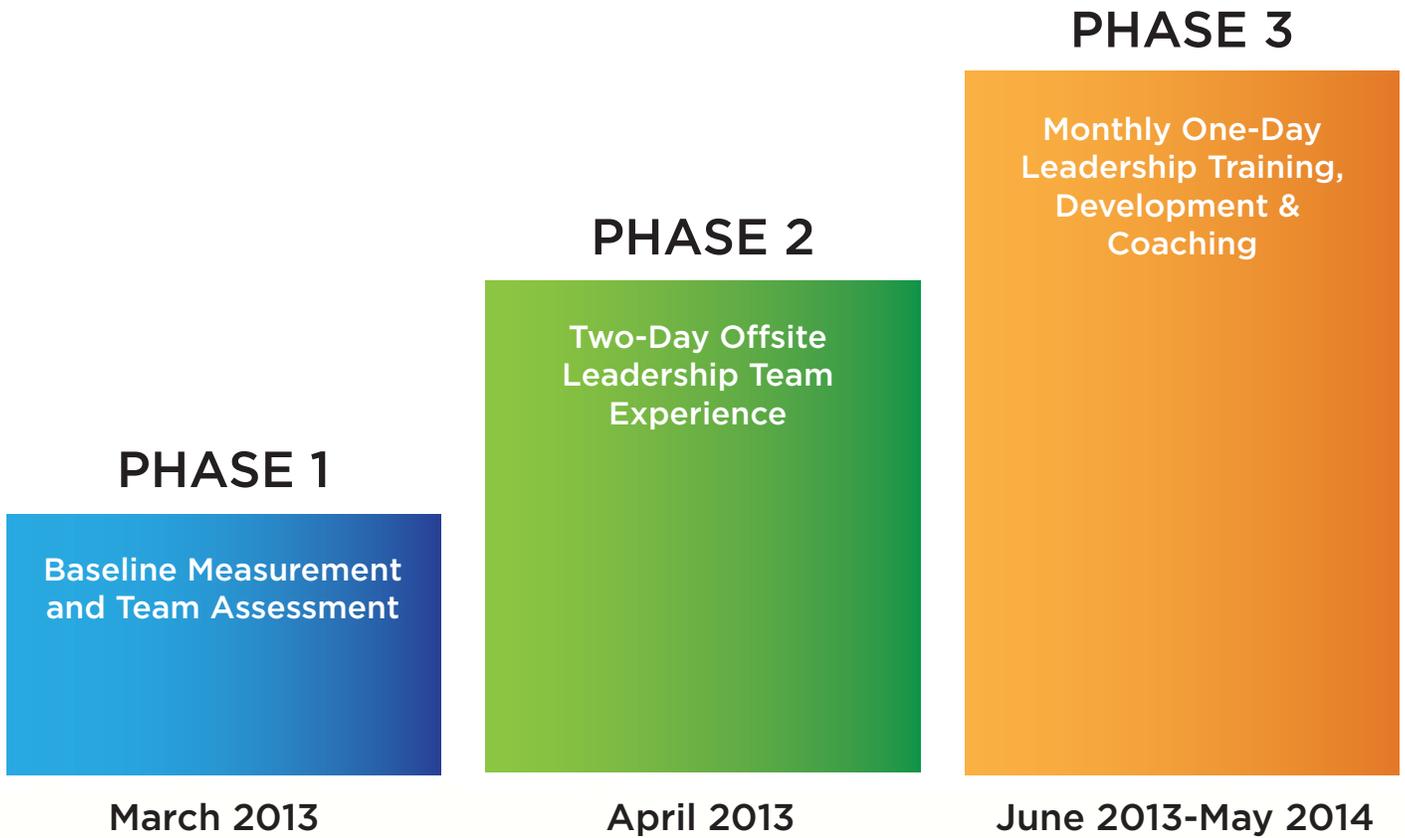
- 10% of learning comes from the actual learning event such as workshops, courses, seminars, tutorials and even in some cases reading books and articles and watching videos.
- 20% of learning comes from informal conversations about the learning content, including sharing ideas, experiences and coaching and mentoring about the learning topic. (Reflective learning activities such as journaling also fit here.)
- 70% of learning comes from the actual application and practice of the learning information in a real and practical sense, such as on the job usage or in the pursuit of goals. (Active learning activities fit here, including learning on the job without any formal learning event.)

As you can see, coaching is the “connector” between someone attending a formalised learning event and putting the information into practice in a real and meaningful way.

## **THE 70/20/10 LEARNING MODEL**



## TIME FRAME

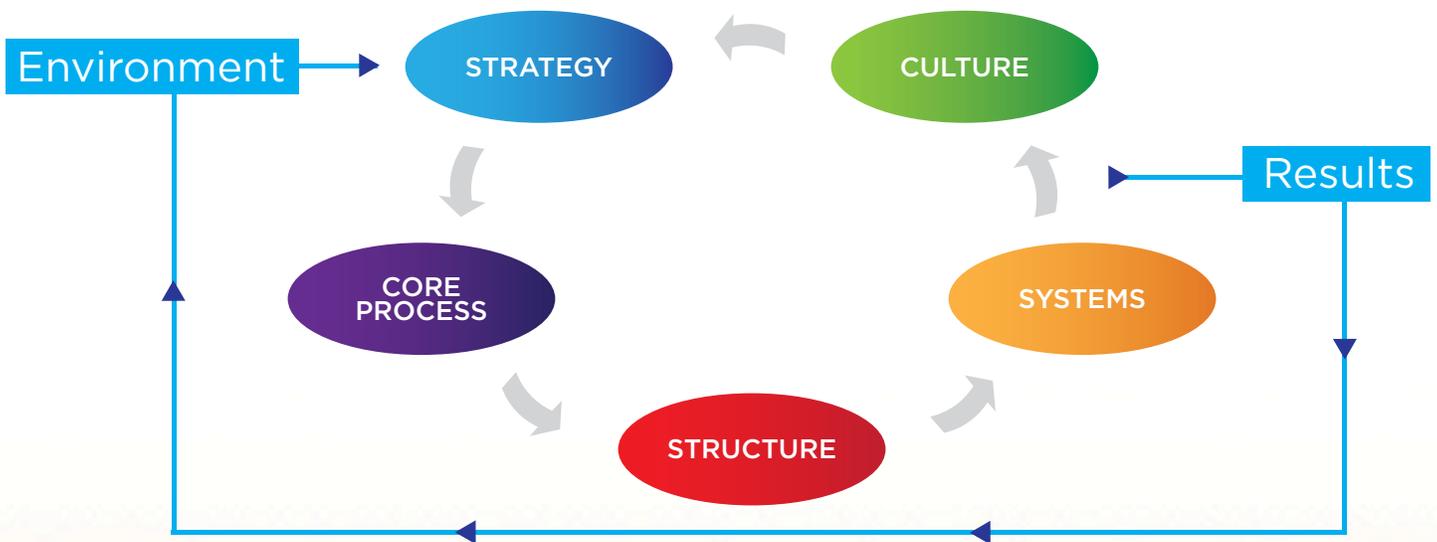


## PHASE 2

“Even if you’re on the right track, if you just sit there, someone will pass you by.” - Mark Twain

With this in mind, First National Bank McGregor South Bosque wishes to grow its current team’s leadership ability and performance. To do this, 360Solutions will employ the Transformation Model in the two day offsite event.

### TRANSFORMATION MODEL

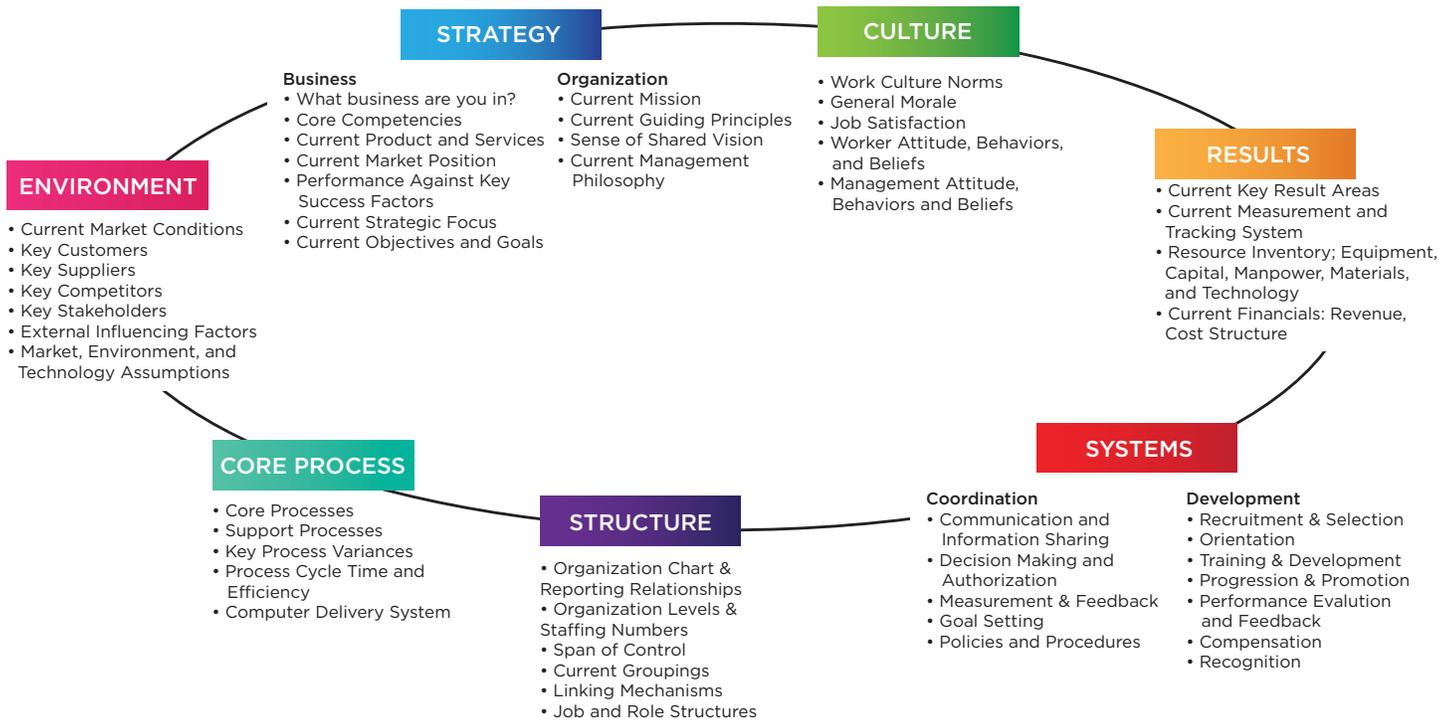


#### Goals:

- Clarify current results and how they are measured
- Clarify current business strategy and core ideology
- Identify core processes (Good and Bad)
- Clarify organizational norms, attitudes, and behaviors
- To summarize assessment findings and plan next steps for change

# TRANSFORMATION MODEL

## Assessment Elements



The transformation model provides a framework for viewing an organization as a living system. Using the model, lenders can see how the pieces of the organization fit together, and then make conscious choices about how to improve their effectiveness. The seven elements of the model form the “Big Picture” of the organization. Using the model will improve key results and lead to increased effectiveness.

## INVESTMENT

360Solutions stands ready to work with First National Bank McGregor South Bosque to develop its leadership team through training and coaching in the outline in this proposal.

**Phase 1:**

Baseline Measurement and Assessment

**Phase 2:**

Two Day Offsite Leadership Experience

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**Phase 3:**

Monthly One Day Leadership Training,  
Development & Coaching Sessions for 12 Months

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If this proposal meets with your expectations for the leadership training and coaching for your team at First National Bank McGregor South Bosque, just sign below and we can schedule the Two Day Offsite event.

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David Littlewood  
President  
First National Bank McGregor South Bosque

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Chip Wilson  
CEO  
360Solutions

# NOTES

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