

McKinsey.org

Take a Step. Forward.

My Learning Workbook

Your Name: _____

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Welcome to the McKinsey.org Forward Program

What is Forward?

Forward is a **10-week online learning program** delivered in a digital and virtual format

It begins by building **foundational career skills** at the Core Skills Level through online courses, case scenarios, and interactive learning events. Ultimately, you will develop new behaviors through ongoing reflection and application

At the end of the program, you will receive a **McKinsey.org Forward digital badge** and join the **Network Level**, an exclusive global network of lifelong learners

What is the Forward Learning Workbook?

Your **Learning Workbook** is your **essential companion** on your journey during and after the program

It serves as a canvas for you to capture **key learnings, ideas, and reflections**. During the online courses you will be **prompted to visit the Learning Workbook to complete exercises and reflections**

The Forward team will **not request the workbook** and you will **not be required to** submit the workbook

McKinsey.org Forward Learning Workbook Contents

Introduction to your journey ahead

Skills Reflection

Adaptability and Resilience course

Problem Solving course

Communicating for Impact course

Relationships & Well-being course

**My Digital Toolkit: Digital and AI
Essential course**

Your Roadmap and Planner

Below is the list of components you will see in the digital learning plan on the learning platform. Use this checklist to mark your progress along the learning journey. Use the suggested timelines to help you pace yourself through the journey to complete by the deadline

	Item	Description	Duration
Preparation & Week 1	☐ Complete ‘Welcome: Introduction to your Journey Ahead’	An overview of the skills you will learn and how you can use them in your career journey	20 minutes
	☐ Download and save ‘Forward Learning Workbook’ located within ‘Resources for your Journey’ or all the digital courses	A key companion during your learning journey to capture learnings, ideas, and reflections	5 minutes
	☐ Visit ‘Join a Welcome Webinar’ to sign up and attend the optional webinar	A chance to meet the Forward team, McKinsey leaders and past participants for an overview. It is optional and sessions are only available in the early days of the journey.	1 hour
	☐ Complete ‘Survey: Reflect on your Skills’	A tool to reflect on your current future of work skills and behaviors before starting the courses	10 minutes
Weeks 2-3	☐ Complete ‘Adaptability & Resilience Course’	4 self-paced modules where you will explore effective learning habits and mindsets for change	2 hours
	☐ Visit ‘Attend the Mandatory Webinar: Lead Forward – Mindsets for Growth’ to sign up for 1 session	A sign-up form to register for 1 of the sessions taking place during the program	5 minutes
	☐ Attend and verify your attendance to ‘Mandatory Webinar: Lead Forward – Mindsets for Growth’	Apply Adaptability & Resilience learnings and deepen leadership skills. After the webinar, submit the ‘Verify your attendance to the Mandatory Webinar: Lead Forward - Mindsets for Growth’.	1 hour 40 minutes
Weeks 4-5	☐ Complete ‘Problem-Solving Course’	5 self-paced modules where you will learn to apply structured thinking to define problems and reach a solution	3 hours 30 minutes
	☐ Complete and submit ‘Case Assignment: Solve a traffic problem’ through the form in this component	A real-word case to solve while putting the learnings from Problem Solving into practice	1 hour
Weeks 6-7	☐ Complete ‘Communicating for Impact Course’	5 self-paced modules where you will discover techniques for focusing, organizing, and engaging in meaningful communication	3 hours 30 minutes
Week 8	☐ Complete ‘Relationships & Well-Being Course’	3 self-paced modules where you will explore strategies for improving well-being through strong relationships and safe team environments	2 hours
	✳ If you have not already, ensure to check the available ‘Mandatory Webinar: Lead Forward – Mindsets for Growth’ sessions and sign up to attend one prior to program end date		
Weeks 9-10	☐ Complete ‘My Digital Toolkit Course’	1 self-paced module where you will create a plan for keeping current with digital elements	2 hours
	☐ Complete ‘Survey: Reflect on your growth’	A tool to reflect on how your future of work skills and behaviors were impacted during Forward	15 minutes
	☐ Complete ‘Feedback Survey: What did you think of your experience?’	A chance to share your experience in the program by completing this brief feedback survey	5 minutes

Introduction to your journey ahead



Forward Learning Workbook Exercise #1:

Reflect on your journey ahead

As you go through the modules, it is important to recognize why you are learning these skills and what you plan on using them towards. Identifying key motivators will keep you persistent through your journey!

What opportunity are you working towards?

What are your goals for this program?

What might help you get there?

What are you most excited about in this program?

Forward Learning Workbook Exercise #2:

\What skills are crucial to you?

While all the following skill modules will be crucial to your journey, it is important to recognize which modules you would like to prioritize & how you plan on practicing these skills in your day-to-day life.

What three skills do you think will be the most important for your career moving forward?

Based off what you have learned so far in the course, take a moment to reflect. Click on the blue boxes to answer the question.

- ☐ Adopting mindsets and habits that make you adaptable and resilient in difficult times
- ☐ Defining problems and prioritize tasks in a structured manner when faced with a new problem to solve
- ☐ Planning and structuring your communication to address an audience to take action
- ☐ Understanding the digital world and developing a digital toolkit for success
- ☐ Building strong relationships and maintaining your well-being

As you continue with this program, think about why these skills are the most important for your career moving forward.

Skills Reflection



Skills Reflection

This tool will help you reflect on your skills before embarking on your journey with the program and even months after. By reflecting on the frequency in which you behave in certain ways, you will get insights into your strengths and areas of improvement, which can help you focus as you go through the journey and set learning intentions to further your growth. Read each of the 10 behaviors carefully and select the choice that best reflects how frequently you usually engage in this behavior.

			Always or Almost always	Often	Sometimes	Seldom	Never or Almost never
Adaptability & resilience	Being aware of and shifting mindsets in challenging situation	In a challenging situation, I am aware of how I am thinking, feeling and behaving and actively try to adjust if needed.					
	Intentionally seeking learning opportunities	I jump on the opportunity to learn new things outside my comfort zone, even if that means making mistakes.					
Problem solving	Using structured thinking to define a problem	When faced with a problem, I define it and break it down into different pieces before starting to solve it.					
	Using structured thinking to reach a recommended solution to a problem	To reach a recommended solution to a problem, I rely on several analysis and present a synthesis of the insights.					
Communicating for impact	Communicating a large amount of information in a brief and insightful way	When communicating a lot of information, I start with my most important message and then support it with details as needed.					
	Tailoring a message to the needs of my audience	When preparing any piece of communication, I analyze my audience and their needs and tailor the message accordingly.					
Relationships & well-being	Building psychological safety in teams	I create a team environment where people feel heard and appreciated and want to coach each other.					
	Maintaining well-being	I assess my physical and mental well -being and actively try to improve it by incorporating new habits.					
	Investing in workplace relationships	I build or deepen relationships with colleagues at work by being attentive, vulnerable, empathetic, and compassionate.					
Navigating the digital world	Building a digital toolkit	I proactively identify and pursue opportunities to grow my knowledge and skills in data, technology, AI and new ways of working.					

Adaptability and Resilience Course



Setting meaningful learning intentions

Tip: to set meaningful learning intentions, follow these 3 guiding principles to ensure you get the most out of setting these intentions

1. **Preparation:** investing the time and energy to set yourself up for success
2. **Execution:** learning and performing to the best of your capabilities, and enjoying yourself in the process
3. **Reflection:** learning from your past actions

We live in a complex world with more stimuli than we can possibly process. Setting learning intentions helps us to cut through the noise and stay focused on what we've identified as personally important.

There are two specific, subtle ways in which we can frame our intentions—our direction forward—that support both our ability to learn and the likelihood that we'll enjoy the experience.

Focus on the journey

Frame your desired outcome as a learning intention versus a performance goal.

Good learning intentions prioritize the experience itself, not just the outcome. Instead of focusing on a specific target, they focus on:

- The process
- Discovering and exploring new ideas
- Our growth

Link to meaning

Connect your learning to something that is personally meaningful to you.

Taking the time to make this connection will help you learn better and have more fun in the process.

Questions you might ask yourself include:

- When things get hard, what keeps me motivated?
- What makes me feel fulfilled and proud?

My notes

Forward Learning Workbook Exercise #3:

What's your learning intention for this program?

Take a moment to reflect here. Build your learning intention for this program and reference the suggested structure in the module to guide your thinking.

Use APR to activate adaptability and resilience

More than just recognizing when we or others are not demonstrating adaptable and resilient mindsets, we have the opportunity to actively shift those mindsets. APR is a technique that you can use both in the moment and as a tool for reflection.



Awareness

Become aware that I am operating from “default”

Think of something you have been finding challenging.

What does it make you think and feel?

What are your mindsets?



Pause

Interrupt & create space

Take a pause in this very moment to center yourself. Maybe take a few deep breaths or plant your feet on the floor.



Reframe

Use specific questions to embed new mindsets and take an aware action

What opportunities would there be if you were to shift your mindset?

My notes

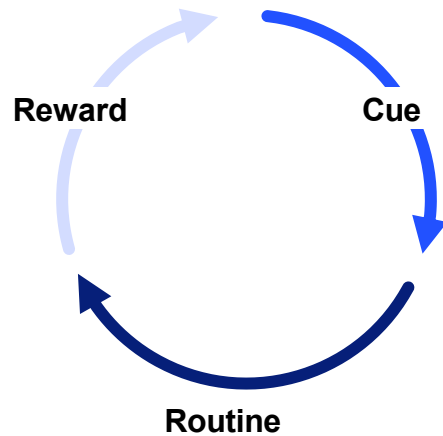
Continue to think about ways you can flexibly incorporate APR in your daily practices. In particular, think about how you can practice integrating questions that will help you to reframe specific mindsets.

Forward Learning Workbook Exercise #4: Holding adaptable and resilient mindsets

Take a moment to think and reflect here. Within the past week, how frequently have you held an adaptable and resilient mindset? For times when you didn't hold these mindsets, what could you do differently to shift your mindset?

Turning behaviors into habits

Practicing a behavior for one to two months turns it into a habit, but habit formation takes more than just time. To establish healthy habits or break unhealthy ones, you must grasp how habits form and endure and take actions to make behaviors stick via a Habit Loop.



Reward

What will your reward be? What will make you feel good about your routine?

When adopting feedback as a learning habit, the feedback itself can be the reward.

But you should also consider other physical, mental, or emotional rewards.

The reward could be the gratification of marking a big X on your calendar or something more concrete.

Cue

What's the reminder? In other words, what cue will trigger your habit?

You might set an electronic reminder: for example, a calendar invite that pops up at the start of every week.

You might try a physical note or object, like a reminder you place by your desk. Or perhaps you have a calendar out in the open, featuring an X on every day that you gave or received feedback.

Routine

What's the routine? What steps are required to uphold this habit?

Perhaps you set aside time for feedback in your standing meetings.

Maybe you reach out to a new, different person each week to ask for feedback.

Alongside implementing the habit, you might also reserve time to consume content, like articles or videos, and reflect on potential obstacles and their solutions.

My notes

Forward Learning Workbook Exercise #5:

What's your plan?

Start by choosing a behaviour you'll focus on. Reflect below on the following questions as they relate to the Habit Loop:

How will you truly make this new behavior a habit?

What cue will trigger your habit? An electronic reminder?
A physical note or object? A specific meeting?

What will the habit look like in action or what will be
the routine?

What reward will make you feel good about your routine?

Why is this habit meaningful to you?

How will you ensure you are maintaining this habit?

What might you need to unlearn?

Adaptability and Resilience Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to build your adaptability and resilience skills.

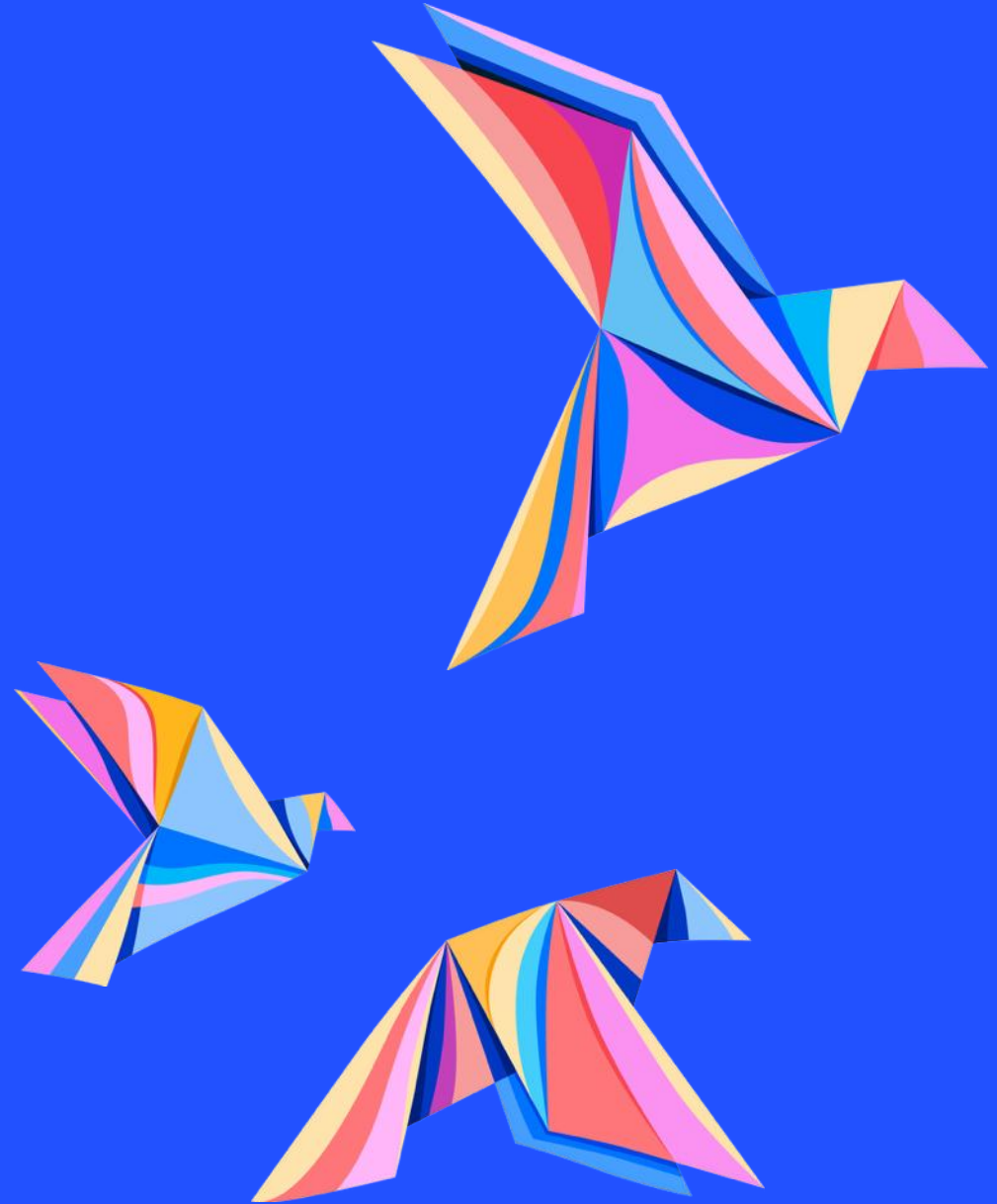
My notes

- 1 Learning Intention vs. Performance Goal:**
Set a learning intention when acquiring a new skill; use performance goals when you already have the skills and want to achieve specific results.
- 2 Focus on the journey and personal meaning:**
Improve your ability to learn by focusing on the process, not just the outcome, and connect your learning to something personally meaningful.
- 3 Mindset awareness:**
Differentiate between your helpful and unhelpful mindsets and recognize their influence on your behavior and progress.
- 4 Shift Mindsets for Resilience:**
Cultivate adaptability and resilience by practicing APR (Awareness, Pause, and Reframe) during challenging situations.
- 5 Habit Formation:**
Develop a customized action plan for building desired habits and unlearning unhealthy ones. Utilize the habit loop (Cue, Routine, Reward) to reinforce positive habits effectively.

End of Course Reflection: Adaptability & Resilience

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

Problem Solving Course



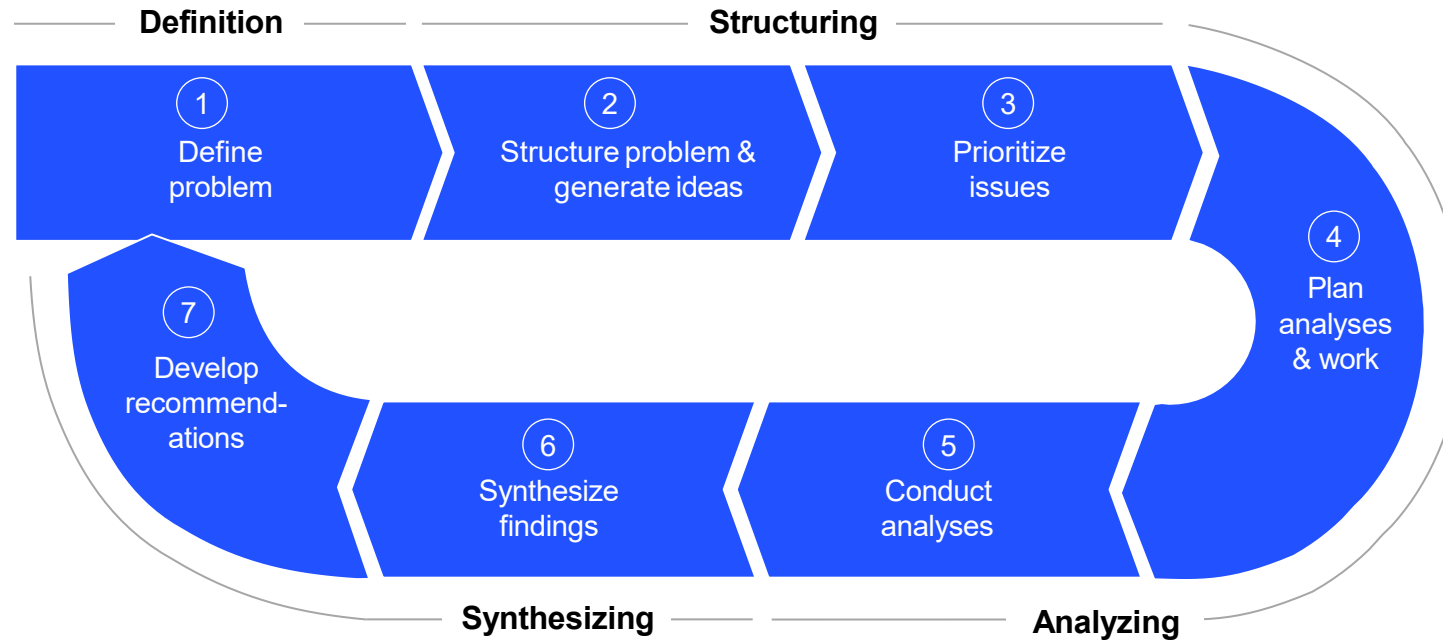
Forward Learning Workbook Exercise #6:

Your approach to problem solving

Take a moment to reflect. Consider a current problem that you're having on the job or at home.

- How can you take a more structured approach to solving that problem?
- Describe your personal approach to problem solving at work or at home. Do you tend to be structured and evidence-based? Or do you take a more intuitive approach? What are the benefits and shortcomings of your current approach?

Using the seven-step, hypothesis-led approach to problem solving



My notes

Forward Learning Workbook Exercise #7:

How do you define problems?

Take a moment to reflect. Do you usually take time to define a problem before attempting to solve it? If so, how? What is your process?

Testing your problem definition using the SMART framework

Specific

Is the question specific enough? Your problem question needs to be detailed enough so that those who are closest to the problem can understand the exact problem that needs to be solved.

Measurable

A measurable result will be instrumental in helping you determine when the problem will be considered solved. This should be a quantifiable number.

Actionable

The problem question should point to the action that needs to be done to solve the problem. Usually, you will need to use the language "How?" or "What actions do we need to take?" in your problem question.

Relevant

Your problem question should be relevant to everyone involved in the situation: the executive, your team, and any other stakeholders. It's important to align everyone so that you all have same goals in mind.

Time-bound

Problem questions should always be time bound to ensure that everyone comes up with solutions that are practical in the time frame that you have defined.

Tip: Use this to test whether you've written your problem statement or question in a way that helps reach the solution.

My notes

Using a Problem Statement Worksheet to define a problem

Problem question (The basic question to be resolved)

Concisely define, in the form of a question, what must be resolved. This focuses your work and ensures that your findings are actionable. Your basic question should be SMART: Specific, Measurable, Action-oriented, Relevant, and Time-bound

Context

Think about the “environment” around the problem you’re facing. Will internal or external situations affect how you solve the problem? Are there complications to consider? This field may encompass current industry trends, availability of finances, or skill gaps on your team.

Constraints within solution space

While scope defines the space of your solution, constraints focus on what can or cannot happen within that space.

Criteria for success

What must happen for your solution to be successful? What could happen to make your solution a failure? Consider timing of impact, visibility of improvement, mindset shifts, and what success looks like for key stakeholders. Criteria should be measurable, so you can judge whether or not your final solution satisfies them.

Stakeholders

List all the major players critical to your solution. Consider all decision makers who could support—or block—your solution. Also include internal or external parties who might affect how your solution is implemented.

Scope of solution space

What will and will not be considered in your solution? The scope should be broad enough to ensure that you’re considering all relevant solutions, yet narrow enough to ensure that your analysis is manageable.

Key sources of insight

These are where you will turn for information. Can you leverage available resources from your department, company, or industry? Identifying these resources will simplify your effort and ensure you’re not repeating work that’s already been done.

Tip: Use this to summarize the problem in a concise way, clarifying precisely what needs solving.

Forward Learning Workbook Exercise #8: Integrating what you've learned

Take a moment to reflect. How has your thinking about problem definition evolved?

- What have you added to your approach?
- What new steps, tools and techniques would you like to integrate into your approach to problem definition?
- What are you most excited to try on the job?

Work planning tools

Best practices

Early	Make sure data and other critical items come in as early as possible.
Often	Revise your work plan as you update and improve your issues and hypotheses.
Specific	Be specific on analysis and sources.
Share	Test with team members; try alternative hypotheses.
Milestones	Be disciplined—deliver on time using 80/20.
Simple	Push detailed work plans out only 2- 4 weeks ahead. Don't write a lot. Keep it simple. Take it piece by piece.
Realistic	Make it manageable and realistic; otherwise it will not be used.

Work plan worksheet template

Issue
Hypothesis/ rationale
End product
Analyses
Sources
Timing/ Responsibility

My notes

Problem Solving Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to effectively approach complex problems that you will encounter and need to solve

My notes

- 1 **Structured approach to problem solving:** Intentionally take a structured step-by-step approach to solve different types of problems that you may need to solve.
- 2 **Problem Statements:** Before diving into a solution, define your problem in one SMART statement or question and lay out different aspects to consider.
- 3 **Issue trees:** Break problems down into specific investigation areas and assess if each can be further broken down into a list of mutually exclusive, collectively exhaustive (MECE) possible solutions.
- 4 **Work planning:** Prioritize the most important pieces of analysis to focus on and create a work plan that includes each piece, its expected outcomes, timelines, and sources of information.
- 5 **Synthesis and recommendation:** Bring together all the findings from your work, develop a “so what”, and tell others what you think needs to be done in order to solve the problem based on your analysis.

End of Course Reflection: Problem Solving

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

Introduction
Skills Reflection
Adaptability & Resilience
Problem Solving
Communicating for Impact
Relationships & Well-being
My Digital Toolkit: Digital and AI Essentials

Case Assignment Worksheets

Use the **next 3 worksheets** to **practice completing the Hustleton Traffic Problem assignment** which you will find in your digital platform under the '**Case Assignment: Solve a traffic problem**'.

When you are done practicing using the worksheets, **submit your answers on the digital platform under the 'Case Assignment: Solve a traffic problem'**.

To keep a copy of your answers, **make sure to write them in your McKinsey.org Forward Learning Workbook.**



1. Problem Definition Worksheet

How to use this worksheet

Use this worksheet to practice completing the **first step of your assignment**: defining the problem clearly for all stakeholders involved.

Using the information provided in the email from the Mayor, concisely define what must be resolved.

What is the Key Problem Statement?

(Write it down, starting with 'How can the city of Hustleton...')

Before you continue, put your statement to the test. Is it SMART?

- | | |
|--|--|
| ☐ S pecific | Is it sufficiently narrow, not too broad and general? |
| ☐ M easurable | Can you quantify and measure it using some metric? |
| ☐ A ction-oriented | Is it clear what needs to be taken action on? |
| ☐ R elevant | Is your problem statement relevant to the problem at hand and for the stakeholders involved? |
| ☐ T ime-bound | Is there a time horizon that indicates when the problem needs to be solved? |

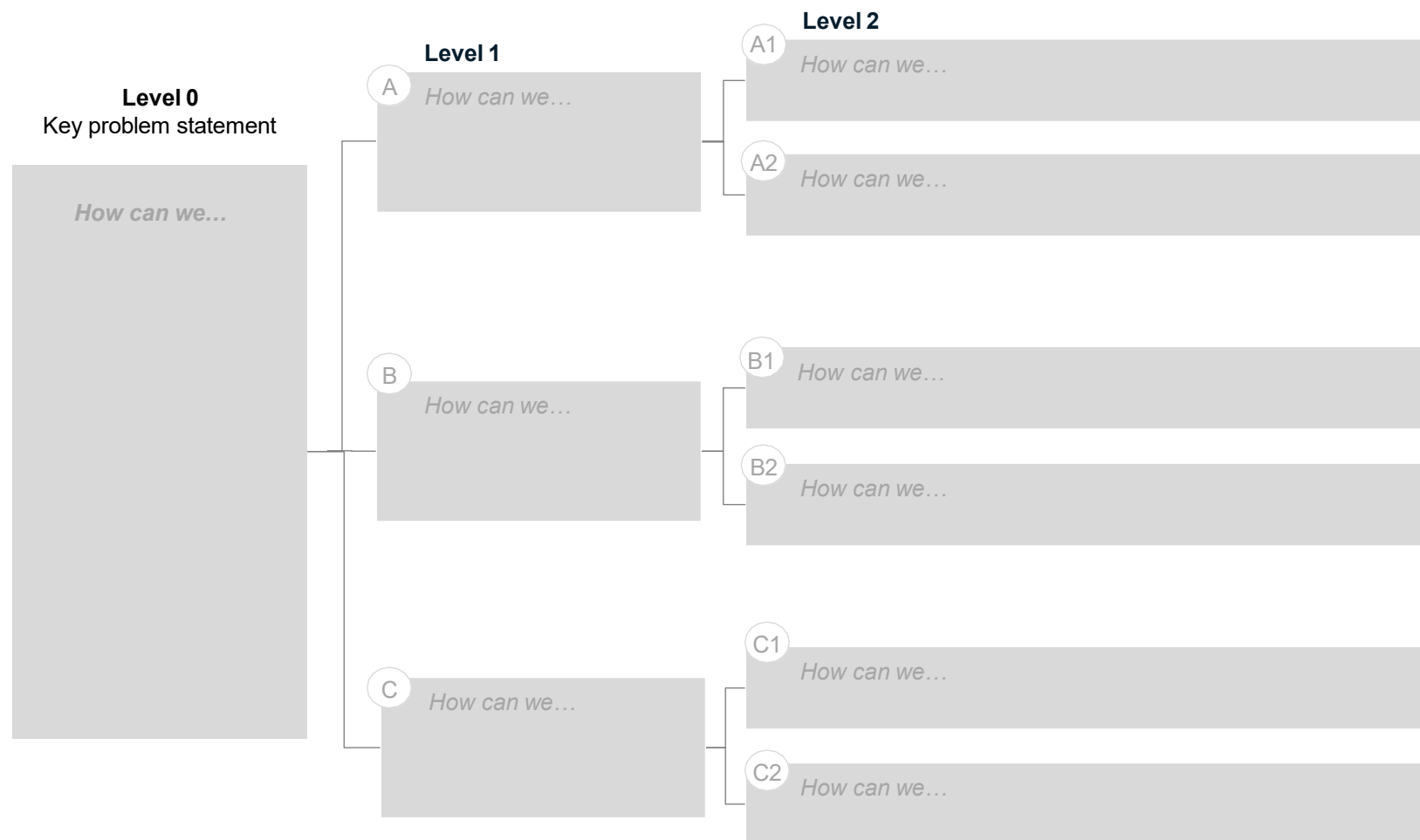
2. Issue Tree Worksheet

How to use this worksheet

Use this worksheet to practice the **second step of the assignment**: identifying a list of potential issues that if resolved, will likely lead to solving the problem.

Write down the problem statement you've defined in the previous step at Level 0 of the tree and then break it down into smaller issues in Level 1 (A, B, C) and then further in Level 2. Structure your sentences consistently starting with 'How can we ...'

For example, if you were solving the problem of 'How can I increase the amount of money I save at the end of the month?' one of the smaller issues you might identify is 'How can I reduce the amount of money I spend?' and another one could be 'How can I make more money?'.



3. Prioritization Matrix Worksheet

How to use this worksheet

Use this worksheet to help you with the **third step in the assignment**: prioritizing two issues that should be analyzed more deeply.

You should consider all the issues you wrote in the Level 2 of your issue tree. Which ones would you place in the highlighted quadrant of this two-by-two matrix? The quadrant called '**High Impact –High Feasibility**'.

To do so, compare them to each other, and ask yourself 'which of these are likely to be the most feasible / easy to solve and at the same time have the biggest impact on the key problem statement?'

Potential Impact

High Impact

High Impact – Low Feasibility

High Impact – High Feasibility

Low Impact

Low Impact – Low Feasibility

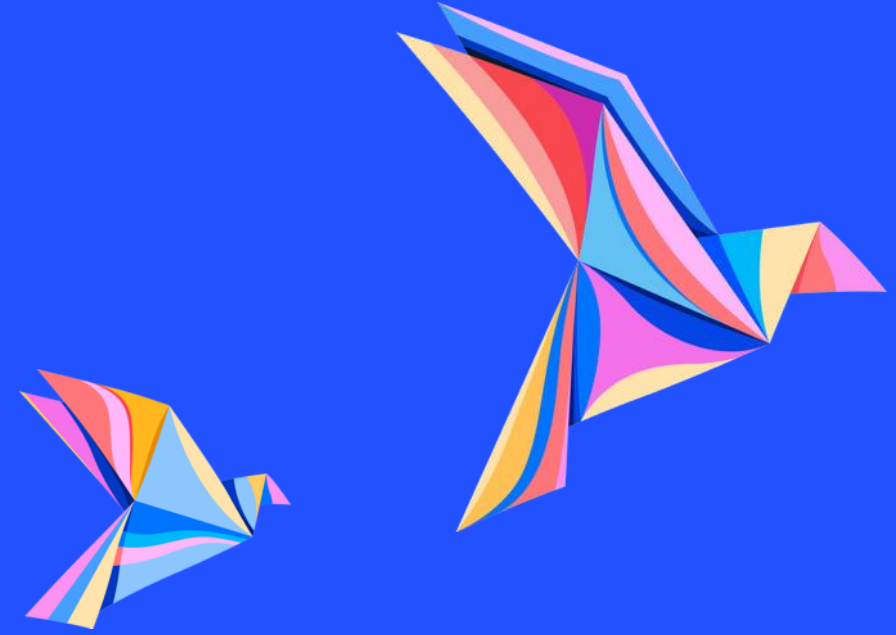
Low Impact – High Feasibility

Low Feasibility

High Feasibility

Feasibility

Communicating for Impact Course



EPIC framework

Empathy

Put yourself in the other person's shoes to understand their perspective.

Purpose

Define the purpose to include their needs and yours.

Insight

Articulate (explain) your ideas in a clear and compelling way.

Conversation

Plan and orchestrate the flow of an effective two-way conversation.

Tip: overcome common communication challenges, and move people to action based on four key steps of the EPIC approach to communications

My notes

Forward Learning Workbook Exercise #9: Reflect on a past interaction

Think about an important past interaction with a group of 2-3 colleagues. Reflect here on the following

- What was the context?
- How do you think your colleagues felt going into the interaction?
- What was at stake for your colleagues?
- Was empathy involved in this interaction? If so, how? If not, what were the consequences?

Using active listening to demonstrate empathy

Tactic	How?	My notes
Supporting and encouraging	Encouraging – “Yes, I see,” “of course,” facial expressions (e.g., smiling), open body stance Validating – “If I were in your situation, I’d feel the same way,” nodding/shaking head Imagining – “I can imagine it’s frustrating for you”	
Reflecting and repeating	Summarizing – “So would it be right to say there are three main issues...,” “It sounds like you’re saying ...” Describing – “You seem upset by that,” “It sounds like you felt angry with him”	
Digging deeper	Clarifying – “Why do you think that happened?” “Which of those issues came first?” Open – “How are you feeling about the project?” “What’s going on for you this week?”	
Offering help	Personal – “Is there anything I can do to help?” Hypothetical – “What would you like to happen in an ideal world?” “How can we make that a reality?”	

Forward Learning Workbook Exercise #10:

Reflect on a past interaction

Using the past interaction you identified in the last exercise, consider this interaction from a Purpose perspective:

- Were you clear on the purpose of the interaction? What was the purpose?
- Did you communicate the purpose up front?
- Was the purpose shared? If so, how?
- If it was not a shared purpose, what could you have done differently? What impact do you think that would have had on the outcome?

Using the Pyramid Principle to organize your messages

What should the pyramid contain?

- A single governing thought which is the key takeaway the audience must hear during the first 2 minutes of your communication event.
- 3-5 key line statements that act as the underlying arguments that support the governing thought.
- 3-5 supporting facts per key line statement which build the foundation of your pyramid and support both the key line statements and the governing thought.

How to get started building your pyramid

Step 1: Begin by reviewing the facts you have collected and create logical fact groupings.

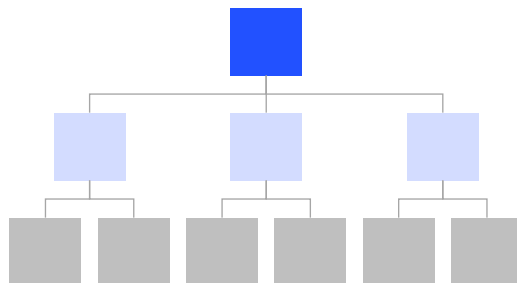
Step 2: Strive to create groupings that have no gaps or overlaps. That is, they are:

- **Mutually exclusive:** The groups address unique issues with no overlap.
- **Collectively exhaustive:** As a set, the groups represent the spectrum of issues at play, leaving no gaps.

Step 3: Write a key line statement to synthesize each logical fact grouping.

Step 4: Write a governing thought to synthesize the key line statements.

My notes



Governing thought: The one-sentence answer or solution to a problem:

- Answers the central question, providing direction for a decision or action
- Makes an overarching point that is a synthesis, not a summary
- Is stated powerfully in short, sharp, plain language

Key line statements: The why and how to implement the solution, underpins the governing thought with no gaps, no overlaps (MECE):

- Each point synthesizes the points beneath it
- Points are at the same level of abstraction and in a logical order
- In a grouping, ideas are of the same logical kind (e.g., reasons, causes, steps, parts)

Supporting data: The supporting evidence:

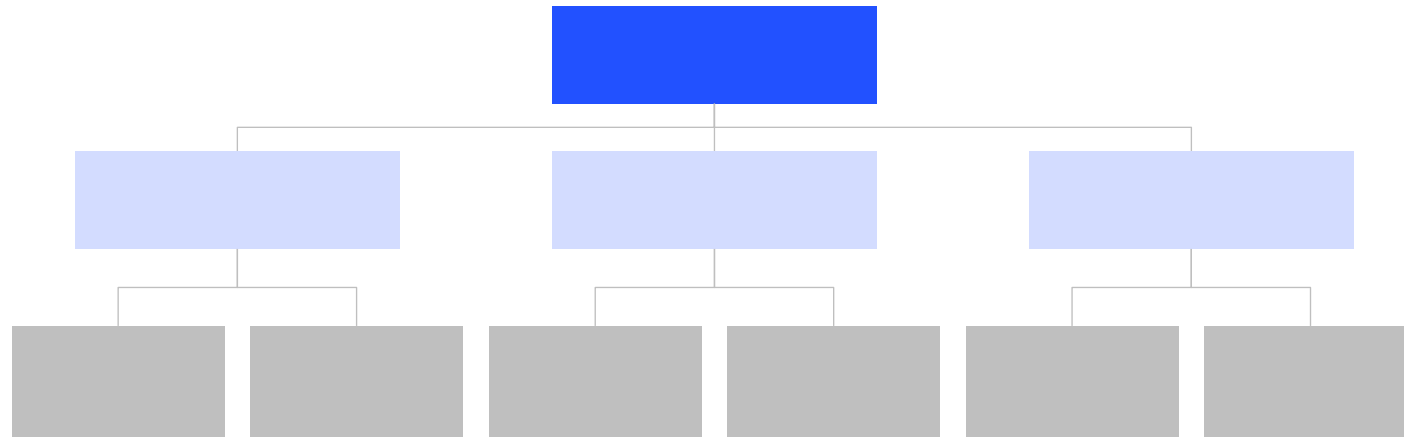
- All data is relevant, sufficient, and fact-based
- Says enough about implications to enable decision making
- Items in each set are MECE

Try it now: Practice with the Pyramid Principle

Identify an email that you sent to a colleague in the last week which covered a substantial amount of information (i.e., longer than two paragraphs). Re-write your email here using the Pyramid Principle worksheet to structure your email in a more compelling way.

After structuring your thoughts in the Pyramid Principle Worksheet, in the space to the right, reflect on the following questions:

- What is your governing thought and why (which you lead with)?
- What are your few supporting arguments below the governing thought and why?
- What is your call to action and why (which you close with)?



My notes

Synthesizing your messages rather than summarizing only

Summary

A condensed version of all the facts.

There are several pain points that we heard from our customer interviews:

- In-store returns are a clunky experience and require customers to wait in line with paying customers.
- Waiting time for inventory checks in-store is too long given customer demand and number of staff available.
- Loyalty program sign-ups at the register require too much time to fill out.

Synthesis

The “so what” of all the facts, providing insight that all the facts together create.

- Overall, customers are looking for an enhanced in-store experience that reduces the time it takes from entry to exit and would opt for self-serve solutions to reduce the shopping-experience time.

Example of summary vs. synthesis

My notes

Tapping into the Three Elements of Style for delivering your messages

Physical presence

This refers to the speaker's ability to appear relaxed, confident, and in control of a room.

Speakers with strong physical presence have good posture, make good eye contact, avoid fidgeting, use gestures appropriately, and move with confidence.

Vocal emphasis

This primarily refers to the speaker's ability to adjust his or her pitch, pace, and volume to match the occasion.

In addition, speakers with good vocal emphasis typically speak in the active voice and rarely use qualifiers or caveats.

Ability to make an emotional connection

This refers to the speaker's ability to gauge the mood of the audience and adjust his or her tone accordingly.

Speakers who are able to make an emotional connection typically make strong eye contact with their audiences and communicate emotion via their facial expressions and tone of voice.

My notes

Tip: use your physical presence, vocal emphasis and emotional connection to deliver your message in a way that moves your audience to take action.

Try it now: Practice the Three Elements of Style

Take a moment and record yourself speaking on one of the topics below:

Topic 1: Take 10 minutes to prepare a brief message that you will deliver orally in an informal or formal meeting in the next week. Record yourself delivering the message with your smartphone and use the Three Elements of Style checklist to critique your own delivery.

Topic 2: Take 10 minutes to prepare a brief message convincing a friend to watch your favorite TV show. Record yourself delivering the message with your smartphone and send it to your friend. Ask them to a) share whether or not they were inspired to watch the TV show, and b) provide feedback on your delivery style.

After recording yourself, use the checklist below to grade yourself across the Three Elements of Style and reflect where needed.

The upcoming opportunity I've chosen is:

My audience is:

The Purpose of my interaction is:

E.g., Inspire a colleague to take on a leadership role on my project

Vocal emphasis

Adjusts pitch, pace, and volume to match the occasion

Uses the active voice

Minimizes qualifiers and caveats

Uses rhetorical techniques appropriately (e.g., repetition, alliteration, three-point lists, pauses for impact)

Notes

• ...

Physical presence

Appears relaxed, confident, and in control of the room

Has strong posture

Moves with a purpose

Uses appropriate gesture

Optimizes physical environment

• ...

Emotional connection

Express authentic emotions and/or vulnerability

Selects an appropriate tone to match the Purpose of the interaction

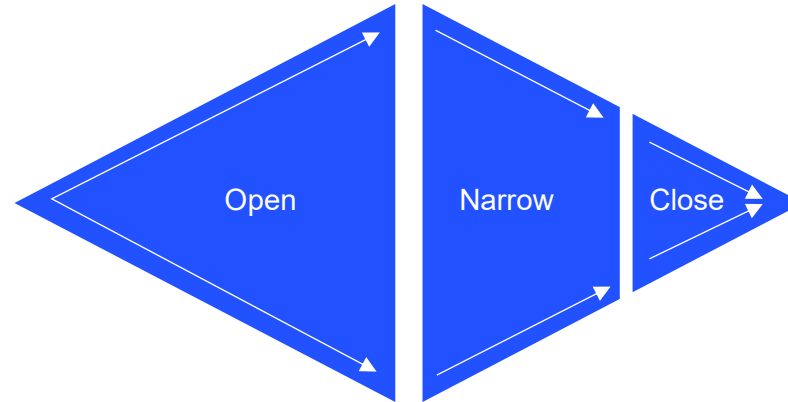
Has strong eye contact and uses appropriate facial expressions

Uses storytelling

• ...

My notes

Using the Open, Narrow, Close approach to facilitate a conversation



The **Open, Narrow, Close** approach to facilitation can serve as a useful architecture for your meeting:

- **Opening** a conversation is about making people feel comfortable about who they're with and what they're going to do in the meeting.
- **Narrowing** in on the conversation involves the right mix of questions and statements to help keep the thinking and process on track and to create an inclusive and open environment.
- **Closing** a conversation is about reaching alignment and synthesizing the group discussion with key takeaways and next steps with owners and deadlines.

Tip: use this to organize the flow of a meeting starting from making people feel heard to reaching alignment on next steps

My notes

A large, empty rectangular box intended for taking notes during the meeting.

Forward Learning Workbook Exercise #11:

Reflect on a past interaction

Think about the past interaction with a group of 2-3 colleagues you identified in the prior modules. Take a moment to reflect in the space below about the following questions:

- Did the meeting have a clear and compelling opening? What did the facilitator do to make the participants feel comfortable about who they're with and what they're going to do?
- Did the facilitator ask provocative and insightful questions to narrow in on the conversation? How did they use questions and statements to help keep the thinking and process on track and also create an inclusive and open environment?
- Did the facilitator close the meeting with a clearly articulated outcome assigned to an owner with a set deadline? Were next steps defined?
- Did the facilitator help move the group to alignment, commitment, or action? If so, how?

Communicating for Impact Key Takeaways

As you leave this course, here are the key tools/takeaways that you can use to strengthen your communications with others:

- 1 **EPIC framework:** Personalize, connect with, and effectively communicate your messages to others with this framework.
- 2 **Empathy and active listening:** Consider how your audience thinks and feels before any interaction and use active listening to deepen your understanding and make them feel heard.
- 3 **Purpose of an interaction:** Pause to think about what both you and the other person want to get out of an interaction and guide the conversation accordingly.
- 4 **Story lining:** Weave your messages together in a clear storyline by using the Pyramid Principle to organize your one overall governing thought followed by insights.
- 5 **Delivering with style:** Beyond what you will say, plan how to say it a way that moves your audience to action by using your physical presence, vocal emphasis and establishing an emotional connection.

My notes

End of Course Reflection: Communicating for Impact

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

Relationships & Well-Being Course



Considering the different ingredients of well-being

Your well-being tank is fueled by four sources: mental, physical, social, and spiritual. However, our habits often cause us to prioritize just one or two of these sources.

To ensure your well-being is truly at its best, you should consider all four.



Physical

Sleep, Exercise, Nutrition



Mental

Hobbies, Meditation, Focus, Introspection



Social

Relationships, Societal role



Spiritual

Professional calling, Spiritual connection

My notes

Principles for putting this into practice

No matter which source of well-being you want to prioritize, or the specific behaviors you want to improve, there are four big ideas that will help you maximize your efforts.

- Tiny behaviors lead to sustainable change: be specific and focused in your actions.
- Small and frequent is best: don't rely on just one big moment to energize yourself.
- You have positive habits you can build upon: identify some existing cues that prompt healthy behaviors.
- People matter: find others who can support you, offer feedback, and share ideas with you.

Forward Learning Workbook Exercise #12:

Assessing your battery level

Take a moment to reflect. Which of the following statements are true for you? Give yourself 1 point for each true statement. Make sure to note if certain categories are particularly strong or weak.

After you have taken a moment to reflect, calculate your total score and understand what it means. Use the guide in the module to get some suggestions.

Statement	Reflection area: give your score and write notes if relevant
I slept very well last night.	
I have clear, purposeful intentions for the day	
I am looking forward to the day's activities.	
I am optimistic about my future.	
I feel vigorous and energetic.	
My diet is healthy and well-balanced.	
I am experiencing very little fatigue or burnout.	
I can focus on the things that matter most.	
I feel connected to the important people in my life.	

0–3

Your battery is empty

4–5

Your battery charge is running low
and needs attention

6–7

You would benefit from extra
charge to your battery

8–9

Your battery is fully charged

Try it now: Creating your recovery plan

Utilize the template below to create a recovery plan on how you can improve your well-being.

Morning

Afternoon

Evening

Bedtime

Role modeling well-being for others



Your first and foremost job as a leader is to take charge of your own energy and then help to orchestrate the energy of those around you.

— Peter Drucker

Research shows that, when it comes to well-being in the workplace, our behaviors are contagious. Your choices affect the choices of others around you, whether they realize it or not. Each of us should think about how we can maintain our energy and well-being and, in so doing, create a mutually reinforcing support network among our colleagues.

1

Set expectations and boundaries —and communicate them

Get clear on what you need to be your best self and share that with others. More than getting clear in theory, hold yourself accountable!

2

Share what is going on, and ask for support

Challenge yourself to be vulnerable and communicate openly, both about what is working and what is not.

3

Develop team norms

Well-being is easier with the support of a group. Similar to setting expectations and boundaries for yourself, go a step further and do the same as a team.

4

Celebrate one another

Did your teammate just run their first race? Did another make it to a child's soccer game every weekend this past month? These seemingly small things are big deals, and our colleagues are more likely to continue to prioritize their well-being if they are actively encouraged.

My notes

Building strong relationships

We can develop strong, energizing, and resilient relationships by practicing AVEC: attention, vulnerability, empathy, and compassion.

A

ttention

Turning toward the other person literally and figuratively and listening deeply without judgment, distraction, or the desire to respond.

V

ulnerability

Being your authentic self, even if it feels outside of your comfort zone. Acknowledging the role you played in a situation or the assumptions you made, even if you are not proud of them. Sharing honestly how the actions of others affected you.

E

mpathy

Understanding and identifying with the emotions and perspectives that others, based on what they share with you.

C

ompassion

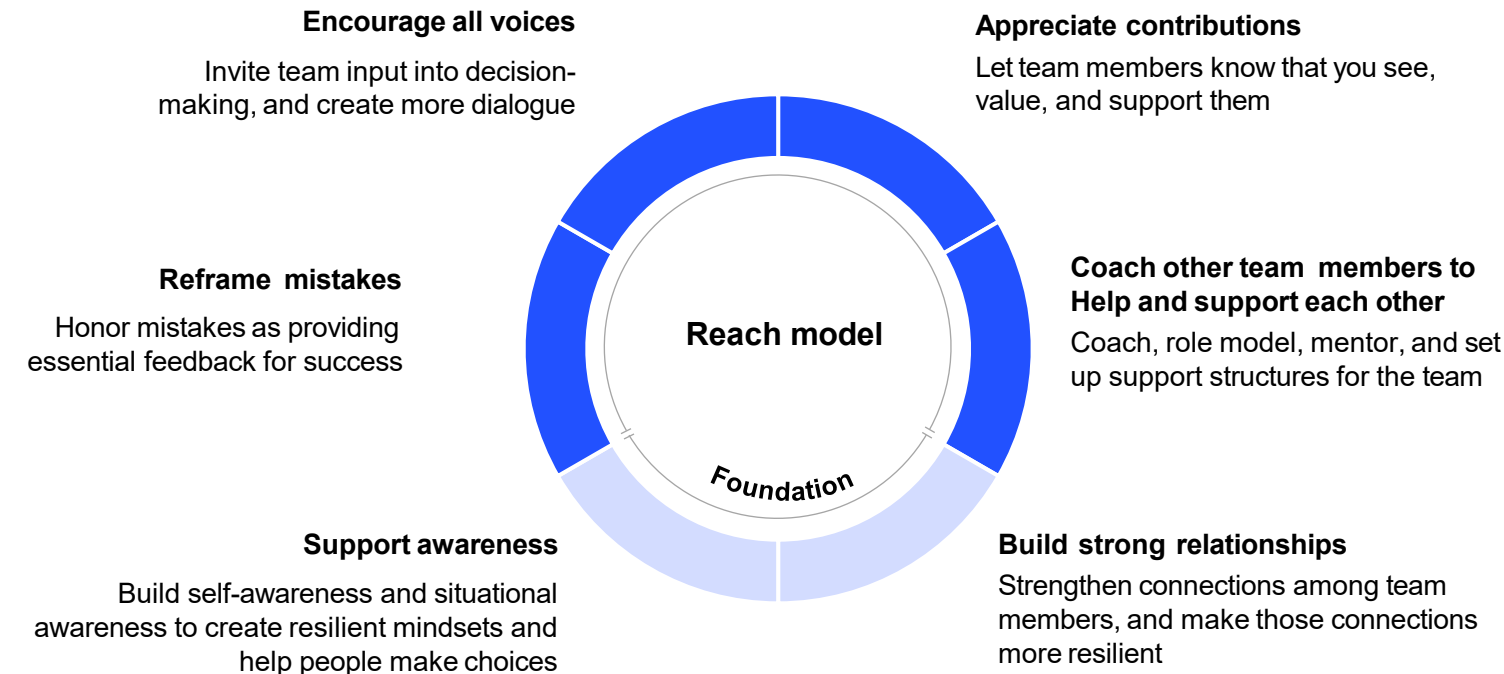
Demonstrating concern with an intent to be helpful. Checking in with individuals to see how they are doing and investing the time to respond in a meaningful way.

My notes

Establishing psychological safety for you and your teams

Psychological safety empowers people to fully contribute their unique talents and perspectives. When this happens, team members can come together to do their best work and learn and perform better, all while reducing stress.

Building from a foundation of awareness and strong relationships, we can use the four actions of the REACH model to guide us.



My notes

Relationships & Well-Being Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to maintain your energy levels and benefit from the power of strong relationships and team environment.

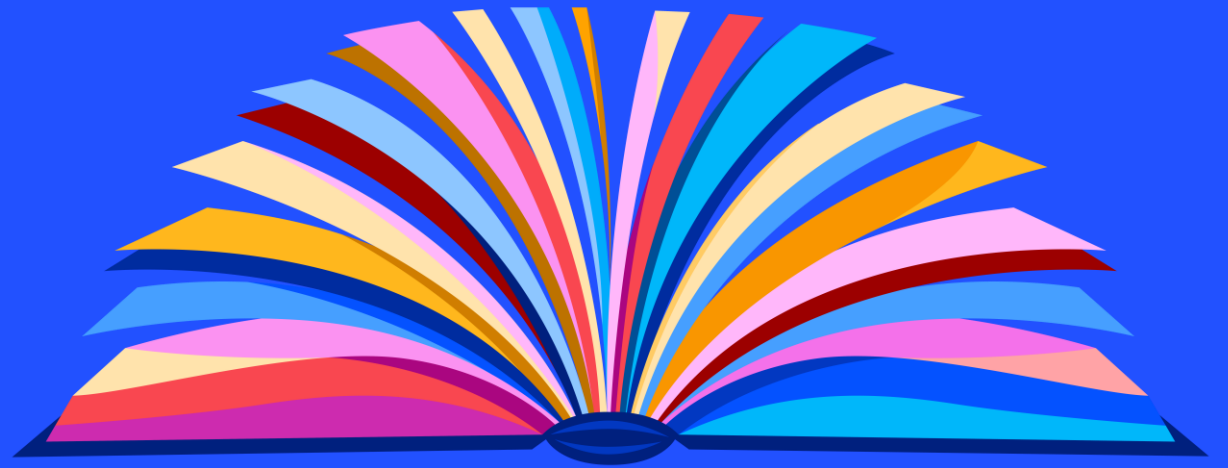
My notes

- 1 **Well-being plan:** Regularly evaluate your current state of well-being across 4 dimensions of physical, mental & emotional, social, and spiritual and take explicit actions to improve areas that are low.
- 2 **Practicing acceptance:** Become more emotionally flexible by understanding what is causing your current emotions and then deciding whether to address them or let them go.
- 3 **Role modeling well-being:** Identify the standard for your optimal well-being and role model this standard for others.
- 4 **Building relationships:** Invest time and effort in building and improving trust-based relationships with others by using attention, vulnerability, empathy, and compassion.
- 5 **Psychological safety:** Improve your team performance and well-being by actively creating an environment where people are not afraid to speaking up, making mistakes, and are excited about coaching each other.

End of Course Reflection: Relationship & Well-being

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

My Digital Toolkit: Digital and AI Essentials Course



Forward Learning Workbook Exercise #13:

How has digital impacted your life?

Take a moment to reflect here. What new app, device, or digital service have you started using? How has this product impacted your life? What made you start using this in the first place?

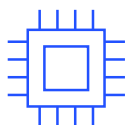
Consider the 3 elements of ‘going digital’

Digital is data, technologies, and new ways of working that can help us maximize value.



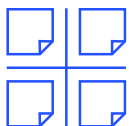
Data

How do new approaches to collecting and analyzing data help us better understand the people we serve, make better decisions faster, and develop new solutions?



Technology

How do new technologies help accelerate impact and solve problems at work?



Ways of working

How do new ways of working enable us to meet people’s needs better and more quickly?

My notes

Forward Learning Workbook Exercise #14:

Reflect on your mindsets towards GenAI

Take a moment to reflect on your current mindset and attitude toward GenAI. Rate how strongly you agree or disagree with each of these four statements.

At the end of this program and as often and you want after that, revisit these same statements to see how your perspective may have shifted.

1 Curiosity

I'm curious about the impact of GenAI and actively experiment with new tools to boost my productivity or solve problems in my personal and/or professional life.



2 Responsibility

I'm confident in using AI-generated content in an ethical way that minimizes risk, and I'm aware of my responsibility to always review outputs and make decisions.



3 Adaptability

I'm adapting to the GenAI space which is still evolving and changing, improving my knowledge and learning new skills as needed.



4 Human-centered thinking

I use GenAI as a collaborative tool that enhances my creativity and efficiency, supporting my work without replacing the unique value I bring.



Forward Learning Workbook Exercise #15:

Using the 4 C Framework. How can you use GenAI to improve productivity and solve challenges you may be facing?

Using the 4C framework, envision how GenAI could become a part of your daily life. What use cases could save you time, improve your team’s creativity at work, or help your community?

Try to name 1-2 examples per category. Ensure the way you draft your example is tied to a specific problem you are trying to solve. Use the structure of 'I can try using GenAI to do _____ so that I can _____.'

Concision

Summarize information, interpret data and generate analysis

Coding & Software

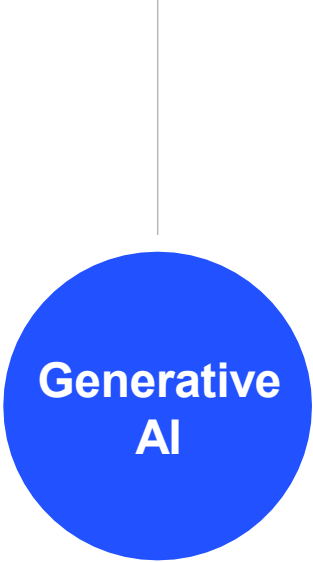
Create code, transform old code or formalize coding requirements

Content generation

Create content such as text, image or video

Customer engagement

Make human-machine interaction more personalized and effective



Forward Learning Workbook Exercise #16:

How could you become a champion of GenAI?

You’ve just explored the different circles of influence—yourself, your team, your organization, and society—where you can shape how GenAI is used responsibly.

Now, it’s your turn: Would you be willing to step up as a champion of GenAI in your own life? If so, challenge yourself to **pick one concrete action you can take within the next month** in each circle of influence—something practical you can do to encourage responsible use and unlock GenAI’s potential for positive impact.

Self (leading by example)

Team (influencing peers)

Society (contributing to the broader ecosystem)

Organization (shaping culture and capabilities at scale)



Forward Learning Workbook Exercise #17:

Create a GenAI learning plan

You’ve now built a solid foundation in GenAI, but this is just the beginning.

Because GenAI is evolving rapidly, staying up to date is key to making the most of its potential. To keep learning, **design your own personalized plan by focusing on three areas:**

- i. Experiment with new GenAI tools
- ii. Apply GenAI in your daily life
- iii. Build on your existing knowledge

For each area, commit to **1–2 specific actions** that will help you grow your skills and stay up to date.

My GenAI learning plan

I will experiment with a diverse set of tools by...

I will use GenAI in my work and personal life to...

I will build on my existing knowledge through...

Forward Learning Workbook Exercise #18:

Your digital toolkit and plan

This template offers an opportunity to craft your own digital toolkit and plan. Take each element of digital at a time (data, technology and new ways of working) and for each one reflect and answer the following questions.

Some examples for actions you can include in your plan include: taking an online course, reading a book, watching videos on Youtube, attending a workshop or webinar, seeking out a friend or colleague who is working in this field, joining a chat group, or simply practicing certain activities at work or personal life.

My Digital Toolkit

How have you already expanding your skills in data, tech or new ways of working?

What is an obstacle you currently face in understanding or taking action in each area?

Identify 1 or more specific actions you want to take to enhance your knowledge and skills in each area

Prioritize one action to start immediately in each area

My Digital Toolkit Key Takeaways

As you leave this course, here are 5 key tools and takeaways that you can use to build your digital toolkit in a modern digital landscape

My notes

- 1 **Going digital:** Recognize that a digital world is all about data, technology, and new ways of working that can help us maximize value.
- 2 **Gen AI mindsets:** Recognize that cultivating key mindsets in the AI era goes beyond technical proficiency and are grounded in curiosity, responsibility, adaptability and human-centered thinking.
- 3 **Beyond prompting and text use cases:** Keep strengthening your prompting skills and using Gen AI as a problem-solving partner. Remember, Gen AI and Agentic AI support far more than text generation. They can design workflows, build websites, write code, and more. Use cases continue to expand.
- 4 **Championing AI:** Recognize that there is a number of actions take to positively influence the responsible development and use of AI for the betterment of the world, no matter your role or level of expertise
- 5 **Building a digital toolkit:** Understand the profound impact of digital in life and work, and plan to continuously expand your knowledge and skills in data, technology, and new ways of working.

End of Course Reflection: My Digital Toolkit

Take a moment to reflect and jot down any key points that you would like to revisit in the future.

- Introduction
- Skills Reflection
- Adaptability & Resilience
- Problem Solving
- Communicating for Impact
- Relationships & Well-being
- My Digital Toolkit: Digital and AI Essentials