

AGSM Year Book

Presentation

Appendix

## Appendix 1.

### Active Verbs

Accelerated	Defined	Formulated	Interpreted	Planned	Selected
Achieved	Delivered	Founded	Introduced	Prepared	Shaped
Acquired	Demonstrated	Gathered	Launched	Presented	Simplified
Advised	Designed	Generated	Led	Produced	Sold
Analysed	Directed	Handled	Maintained	Proposed	Started
Approved	Doubled	Headed	Managed	Provided	Strengthened
Built	Eliminated	Identified	Modified	Rationalised	Structured
Centralised	Enlarged	Implemented	Motivated	Recommended	Supervised
Collaborated	Ensured	Improved	Negotiated	Recruited	Transformed
Completed	Established	Increased	Organised	Reduced	Turned
Conducted	Evaluated	Influenced	Participated	Reorganised	Uncovered
Constructed	Examined	Initiated	Performed	Restructured	Undertook
Controlled	Expanded	Instigated	Persuaded	Reviewed	Unified
Created	Extended	Instructed	Piloted	Saved	Verified
Decided	Facilitated	Integrated	Pioneered	Secured	Won

## **Appendix 2**

### List of some commonly used competencies

Team orientation

Communication

People Management

Negotiation skills

Customer focus

Results orientation

Problem solving

Planning and organisation

Technical skills

Leadership

Business awareness

Decision making

Change orientation

Developing others

Influence and persuasion

Initiative

Interpersonal skills

Strategic orientation

Creativity

Information management

Quality focus

## Appendix 3

### ANALYSING AN ACCOMPLISHMENT

HEADLINE:

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PROBLEM / CHALLENGE YOU FACED

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ACTIONS DISPLAYED

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\*

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RESULTS DELIVERED

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SUMMARY

- LONG SUMMARY STRUCTURE – Utilises the HEADLINE, ACTION & RESULT

- BULLET POINT STRUCTURE– Utilises the HEADLINE & RESULT

## Appendix 4

### ANALYSING AN ACCOMPLISHMENT

*(M&A Example)*

HEADLINE: Led all activities of acquisition of Y&Z Bank (\$1.5 Bill asset)

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#### PROBLEM / CHALLENGE YOU FACED

- Our company (Y&Z Bank) saw a potential market opportunities in Region ABC, and although it had some presence, its current business was not strategically aligned with the market needs.
  - Without acquiring a financial institution our company would lose momentum and potential market share to competitors
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#### ACTIONS DISPLAYED

- Managed all steps in the acquisition process
  - Developed strategic plan, products, geographies and strike zones
  - Structured the deal; Target identification; direct approach; advised management
  - Managed Due Diligence of FS companies across Region ABC
  - Led terms & agreement negotiation, and commercial deal agreement
  - Managed the transaction, gained internal Y&Z Bank approval, prepared deal and closed the process
  - Project managed the integration and implementation of the operating plan. Managed a team of 20.
- 

#### RESULTS DELIVERED

- Developed strategic plan, structured deal, managed due diligence, transaction management, led negotiations, managed overall integration / operation plan implementation (team of 20).
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#### SUMMARISE INTO BULLET POINT

##### LONG SUMMARY STRUCTURE – Utilises the HEADLINE, ACTION & RESULT

- Led all activities of acquisition of Y&Z Bank (\$1.5 Bill asset). Developed strategic plan, products, geographies and strike zones. Structured the deal; Target identification; direct approach; advised management. Managed Due Diligence of FS companies across Region ABC. Led terms & agreement negotiation, and commercial deal agreement. Managed the transaction, gained internal Company X approval, prepared deal and closed the process. Project managed the integration and implementation of the operating plan, managing a team of 20.

##### BULLET POINT STRUCTURE– Utilises the HEADLINE & RESULT

- Led all activities of acquisition of Y&Z Bank (\$1.5 Bill asset). Developed strategic plan, structured deal, managed due diligence, transaction management, led negotiations, managed overall integration / operation plan implementation (team of 20).

## Appendix 5

### ANALYSING AN ACCOMPLISHMENT

*(Change Management Example)*

HEADLINE: Programme managed full implementation of a re-structured “Value Based” adviser distribution model in four countries

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#### PROBLEM / CHALLENGE YOU FACED

- Current sales organisation structure was inflexible to changing client/adviser needs
  - Sale of financial service product in previous 2 years across region achieved only 40% of target
  - Retention of financial advisers across region 33% (2004), 19% (2005)
- 

#### ACTIONS DISPLAYED

- Reviewed past 5 years financials data and market trends
  - Interviewed over 44 advisors to gain greater understanding of client needs
  - Consulted with OD on various organisational models to meet requirements
  - Presented to, gained buy-in and received the approval of, the Group Executive Board
  - Scoped and planned implementation with 11 month timeline
  - Resources implementation team, working with four commercial sales directors in four countries
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#### RESULTS DELIVERED

- Implementation a re-structured “Value Based” adviser distribution model in four countries in the space of 11 months; an unprecedented pace of change in Company ABC which is now being implemented globally. Results show an improvement in Total Sales (30%), Productivity (45%) and Adviser Retention (60%), contributing to an improvement in Value Added by New Business of over 70% in 2006.
  - Directly managed nine commercial sales directors in nine countries.
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#### SUMMARISE INTO BULLET POINT

##### LONG SUMMARY STRUCTURE – Utilises the HEADLINE, ACTION & RESULT

- Programme managed full implementation of a re-structured “Value Based” adviser distribution model in four countries. Presented to, and received the approval of, the Company ABC Group Executive Board. Full re-structure of distribution model delivered in four countries in the space of 11 months; an unprecedented pace of change in Company ABC which is now being implemented globally. Results show an improvement in Total Sales (22%), Productivity (42%) and Adviser Retention (52%), contributing to an improvement in Value Added by New Business of over 65% in 2006.

##### BULLET POINT STRUCTURE– Utilises the HEADLINE & RESULT

- Programme managed full implementation of a re-structured “Value Based” adviser distribution model in four countries. Results show an improvement in Total Sales (22%), Productivity (42%) and Adviser Retention (52%), contributing to an improvement in Value Added by New Business of over 65% in 2006.

## Appendix 6

### ANALYSING AN ACCOMPLISHMENT

*(IT Rollout Example)*

HEADLINE: Project managed the implementation of five SAP modules across Asia Pacific region

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#### PROBLEM / CHALLENGE YOU FACED

- Our company (Company X) was rolling out a global SAP platform replacing multi tiered legacy systems which were to complex and was unable to communicate with other IT systems across the business. This inefficiencies lead to slow turnaround on supply chain deliveries, costs management and business decisions to move forward.
  - Project managed the implementation of SAP ERP modules across Asia Pacific covering
  - Five SAP modules - Finance, Sales & Distribution, Warehousing, Procurement, & Consensus Forecasting needed to be integrated with the larger SAP rollout across Asia Pacific within a 12 month timeframe meeting global IT integration strategy.
- 

#### ACTIONS DISPLAYED

- Developed implementation plans for COUNTRY 1 and COUNTRY 2.
  - Resourced project team of 12.
  - Developed and monitored project controls covering project budgets in excess of \$2m.
  - Ensured delivery of market implementation to the overall programme target vs. time, quality and cost standards.
  - Ensured adherence to common global standards.
  - Liaised with key stakeholders and project sponsors – Market GMs and CFO Asia Pacific INDUSTRY.
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#### RESULTS DELIVERED

- All five SAP modules successfully implemented across Asia Pacific within 12 month deadline and under \$2m budget.
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#### SUMMARY

LONG SUMMARY STRUCTURE – Utilises the HEADLINE, ACTION & RESULT

- Project managed the implementation of SAP ERP in Asia Pacific covering SAP modules - Finance, Sales & Distribution, Warehousing, Procurement, & Consensus Forecasting. Developed implementation plans for COUNTRY 1 and COUNTRY 2. Developed and monitored project controls covering project budgets in excess of \$2m. Ensured delivery of market implementation to the overall programme target vs. time, quality and cost standards. Ensured adherence to common global standards. Liaised with key stakeholders and project sponsors – Market GMs and CFO Asia Pacific INDUSTRY. System rollout went live within 10 months and within \$2m budget.

BULLET POINT STRUCTURE– Utilises the HEADLINE & RESULT

- Project managed the implementation of SAP ERP modules across Asia Pacific covering SAP modules - Finance, Sales & Distribution, Warehousing, Procurement, & Consensus Forecasting. System rollout went live within 10 months and within \$2m budget.

## Appendix 7

### ANALYSING AN ACCOMPLISHMENT

*(Business Development Example)*

HEADLINE: Established Australian presence for Company X delivering \$2m revenue in first year.

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#### PROBLEM / CHALLENGE YOU FACED

- The company didn't have a sales and marketing team.
  - No presence in Europe, still in development phase of the products.
  - The company didn't have any sales processes, had initial marketing activities but very little foot print.
  - When the first product was finally ready it was when the market segment changed for the worst.
  - We dealt with lots of product malfunctions and a product that the company initially didn't want to support.
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#### ACTIONS DISPLAYED

- Opened the offices in Australia and assisted in hiring the sales team, grew to a team of 25 people within 6 months
  - Lead the activities in writing the internal processes for sales, setting prices, and drafting the partners program.
  - Generated many partnerships for Company X.
  - Identified a niche market need for one of the products and persuaded the company to invest further development to bring the product to the market.
  - Lead the business unit of the XYZ division and brought the company its first revenues and ultimately the sale of the division to Company Y
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#### RESULTS DELIVERED

- Opening the offices in Australia, budgeted and created the sales infrastructure at Company X which grew to a team of 25 people within 6 months.
  - Established internal sales processes leading to initial sales of \$2m from the XYZ division
  - Partnerships with numerous key companies: such as Company A, Company B, Company Y (which later acquired the Company X).
  - Development of a new product with full SW management system and managing P&L group to drive the business.
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#### SUMMARY

##### LONG SUMMARY STRUCTURE – Utilises the HEADLINE, ACTION & RESULT

- Established first Australian presence for Company X. Opened the offices in Australian and assisted in hiring the sales team, grew to a team of 25 people within 6 months. Identified a niche market need for one of the products and persuaded the company to invest further development to bring the product to the market. Lead the activities in writing the internal processes for sales, setting prices, and drafting the partners program. Created key partnerships with numerous key companies: such as Company A , Company B , & Company Y. Lead the business unit of the XYZ division and brought the company its first revenues delivering \$2m in first year and ultimately the sale of the division to Company Y (Nov 2005).

##### BULLET POINT STRUCTURE– Utilises the HEADLINE & RESULT

- Established first Australian presence for Company X delivering \$2m revenue in first year. Opened Australian office (Oct 2004), grew to a team of 25 people within 6 months. Created key partnership with Company Y which acquired the XYZ division in Nov 2005.

## Appendix 8

### ADDITIONAL INFORMATION – GOOD EXAMPLES

1. Ford Middle East award for best performance ever (March 2006). Founder of the NDU Astronomy Club (2000). First Aid Red Cross Volunteer with full time summer dedication (more than 1000 hrs of service) (1999), Scout member and leader (1989-2003), Trainings Service Excellence. Consultative Selling, Time Management, Performance Management, Negotiation Skills, Product Training.
2. Theatre, dance and classical music, Executive Committee Project Manager for 'The Long Table' (a charity for the homeless run by volunteers), mountain biking, long-distance running, scuba diving, hiking, hockey for London University and Gloucestershire County, UK.
3.
  - Elected Chairman AGSM MBA FMCG Club (2007)
  - Honorary Treasurer, The Duchess of Kent Hall
  - Movies, reading, music, singing, table tennis, food & wine
4. Founding President (1996/98) of the NSW Chapter of the Australian Association for Exercise and Sports Science (AAESS) and subsequently elected to the National Board in the position of Vice President – Exercise Rehabilitation (1997/98).
5.
  - AGSM Class of 2008 Wine Club Co-President and Term 1 2007 class representative
  - Terrigal Rugby Club – Club Captain 2002 - 2003, Team Captain 2000 - 2003
  - Established hardwood forestry plantation in Hunter Valley in 2004
6.
  - Harvard Women's Law Journal, Executive Editor, 1995 – 1996; Articles Editor, 1994 – 1995; Subciter, 1993 – 1994
  - Served as "Big Sister" in the YWCA's Big Brother Big Sister program in Dallas and Sydney; served as the Chair of the Lawyers for Children Committee, Dallas Young Lawyers Association, and was awarded (joint) Outstanding Committee Chair
  - Hobbies include food and wine, triathlons (member of TriFitness Squad in Melbourne), US college basketball, and my dog
7.
  - Development Coach, University of NSW Rowing Club (2003 – 2005)
  - Silver medal, Lightweight Eight – NSW Rowing Championships (2002)
  - World Champion, World Schools' Debating Championships, Bermuda (1997)
  - Running, cycling, cooking and reading

## Appendix 9

### ADDITIONAL INFORMATION – POOR EXAMPLES

1.
  - Spending time with family and friends
  - Going to the movies
  - Fine food and wine
2.
  - Investing in the share market
  - Reading and Travel
  - All forms of sport particularly team sports
  - Agriculture
3.
  - Competitive sailing (crew and helm), cycling (on/off road – for fitness & relaxation)
  - Volunteer contributions to industry associations, yacht club and charity; performance arts, music, travel.
4.
  - Family activities, football, cycling