

Lift

A sponsorship and advocacy program enabling diverse talent to aspire for leadership roles while equipping leaders to support their leadership potential

INFORMATION PACK



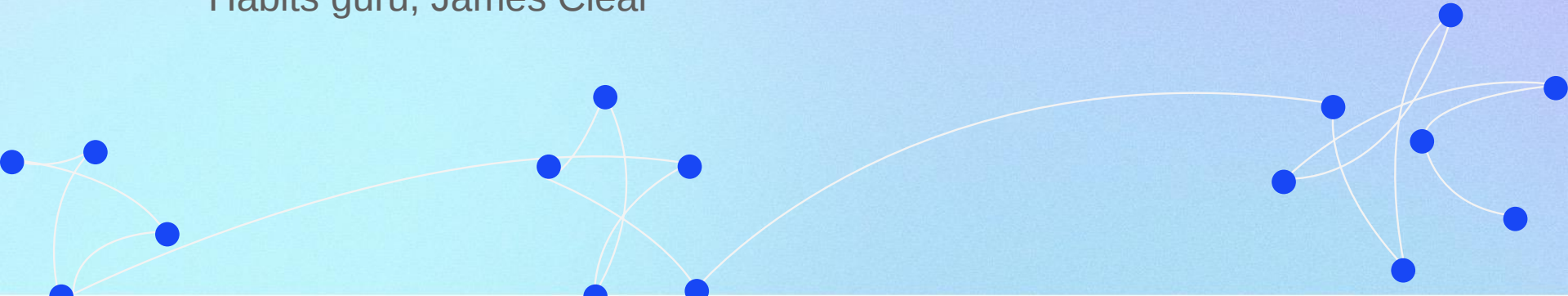
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"The challenge for anyone interested in making progress is to simultaneously have (1) the confidence to go after what you want and (2) the humility to accept who you are right now and (3) the willingness to cultivate a mindset and build the skills that bridge the gap between 1 and 2."

Habits guru, James Clear



In this pack

Welcome

Your learning cohort

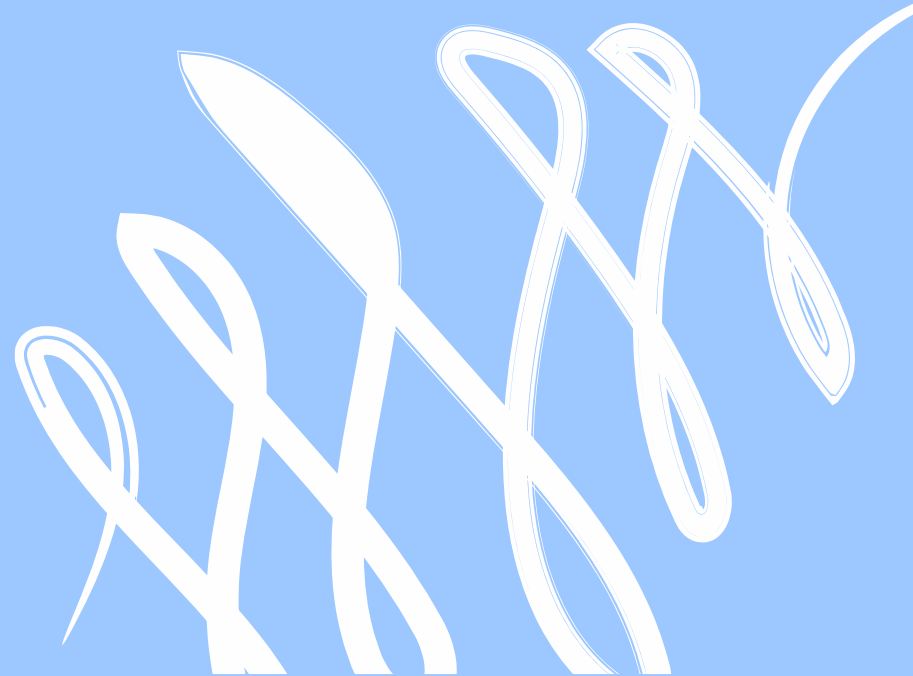
The experience

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Welcome

Congratulations on being selected to participate in Lift – a sponsorship and advocacy program designed for the investment management industry.

Lift develops the leadership capability and confidence of high potential talent (sponsees) while building the commitment and capability of current leaders (sponsors) to support and enable diverse talent to aspire to and fulfil leadership ambitions.

With participants from VFMC, Cbus and Schroders, this 8-month development experience, targets the areas of confidence, capability and commitment via highly interactive learning experiences and practical program content.

In this pack we provide an overview of the program, a snapshot of the key concepts that underpin the experience, and tips for getting the most out of the program.

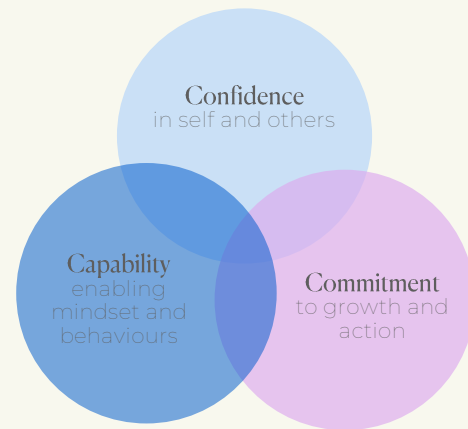
I can't wait to share this journey with you. Please reach out to me directly with any questions.



Yolanda Beattie
Director, Yo&Co

“The program has had a deep and lasting impact on me. It has provided me with the tools to be more reflective and it has helped me develop the confidence to put myself out there.”

Past program participant



Leaders have confidence, capability and commitment to proactively sponsor atypical talent in a range of ways that support their potential

Aspiring leaders have confidence, capability and commitment to take on growth opportunities that ensure they realise their full potential

Your learning cohort

Sponsors

- Nick Tribe
Head of Fixed Income, VFMC
- Leanne Taylor
Head of Portfolio Strategy & Asset Allocation, VFMC
- Gary Gabriel
Head of Portfolio Management Group, VFMC
- Shali Lingaretnam
Head of Investment Stewardship, VFMC
- Sam Hallinan
CEO, Schroders
- Nancy Day
Chief Operations Officer, Investments, Cbus
- Brett Chatfield
Deputy Chief Investments Officer, Cbus
- Alexandra West
Chief Strategy Officer, Investments, Cbus
- Ros McKay
Acting Head of Global Responsible Investment, Cbus

Sponsees

- Amy Li
Senior Analyst – Portfolio Strategy & Allocation, VFMC
- Todd Roper
Senior Analyst, Execution, VFMC
- Kirsten Callander
Senior Analyst – ESG Investment Stewardship, VFMC
- Jesse Oliver
Assistant Portfolio Manager, Active Beta, VFMC
- Kellie Wood
Deputy Head of Fixed Income, Schroders
- Allison van Lint
Head of Research, Responsible Investment, Cbus
- Erica Piazza
Senior Consultant, Institutional Investment Relations, Cbus
- Rennie Greig
Portfolio Manager, Portfolio Execution, Investments, Cbus
- Josh Gan
Manager, Investment Risk, Cbus

The experience

An integrated 8-month program developing existing senior leaders and aspiring leaders in tandem



What to expect

Taking you outside your comfort zone to find your greatest growth edge; supporting you to meet your adaptive challenges

At Yo&Co, we're deeply passionate about supporting every program participant in finding and achieving their greatest growth edge. These are the things you could do differently that would have the greatest impact on your leadership and personal effectiveness.

For sponsors, we'll zero in on how you can adapt and grow to more effectively enable diverse talent. For sponsees, we'll explore your growth opportunities in the context of your leadership potential.

Working on your inner game by elevating your consciousness

To support you in discovering and achieving your greatest growth edge, we focus on the inner game of leadership. If the outer game of leadership is your competencies, skills and knowledge, the inner game is your consciousness.

In the words of leadership gurus Anderson and Adams: *"What you hold in your consciousness tends to manifest"*. Simply put: Thoughts become things.

That's why Lift helps you explore the nature of your consciousness using thought-provoking and playful tools.

Raising consciousness to achieve adaptive challenges

We help you achieve a measurable improvement in your leadership impact by grounding your consciousness practice in tangible adaptive challenges.

As distinct from technical challenges, adaptive challenges require us to change at the level of mindset and identity to achieve new ways of being that propel the next stage of our leadership journey.

New insights into how we get in our own way and the way of others are revealed as we explore how our ego serves us in wonderful ways, and holds us back in others.

Doing this inner work, allows us to fully express our skills and talents, and live up to our full potential.

The outer game matters too

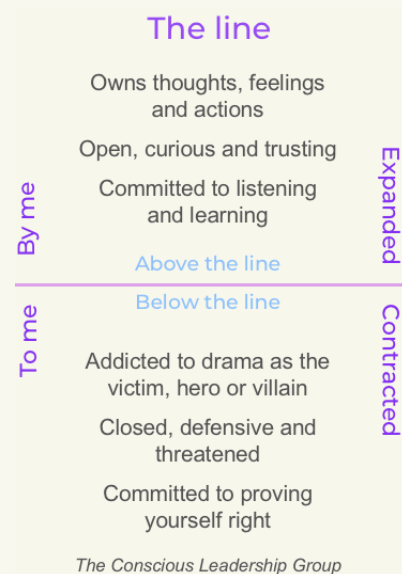
Great leaders play the inner and outer games at once, and Lift will support sponsees to do both by identifying the skills and experience they need to attain to take the next step in their leadership journey.

The best growth happens outside your comfort zone so expect to be challenged, inspired and a little confronted while fully supported to dig deep.

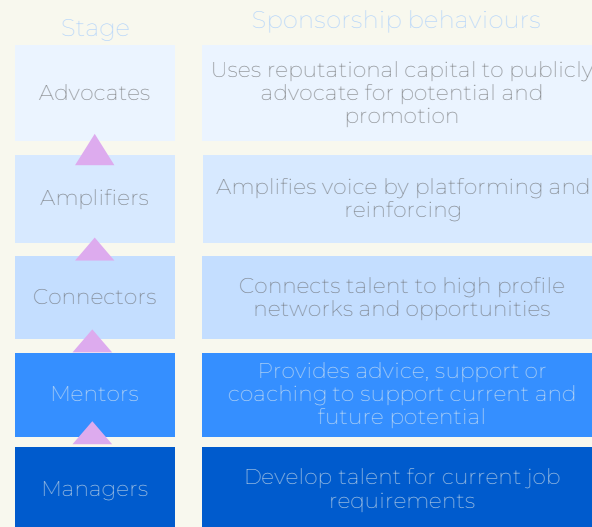
Key concepts and materials

Program content has been sourced from and inspired by the fields of adult development, leadership theory, positive psychology, neuroscience and ancient wisdom. Curating proven concepts and models from some of the world's best thinkers allows us to deliver a learning experience that delivers lasting change.

Materials include personality profiling tool Clarity 4D, session workbooks, inspiring content including articles, podcasts and videos, and links to book virtual pulse coaching sessions with Yolanda (30 mins).



Sponsorship model



Source: Herminia Ibarra, adapted by Yo&Co

Making the most of your experience

A content rich and practical experience designed to deliver immediate and long-term value from the time invested

Sponsee tips for getting out more than you put in

We know time is your most precious commodity. Our goal is to create a learning experience that immediately expands your capacity as a result of you investing some time to internalise new ways of being that change how you show up.

To reap those rewards, we recommend you:

- Spend about an hour a week reflecting on what's shared in workshops and in between. We'll provide a stack of fantastic content in a range of different formats to make that easy and fun.
- Share these ideas with your colleagues, friends and family. The best way to learn is to teach.
- Go all in! That will require you to lean into the discomfort that comes when we surface our fears and insecurities, before finding the path to shift them.
- Let Yolanda know if any discomfort becomes unhelpful. Inner work can surface past traumas. Please reach out if you have any mental health concerns at any point.

Sponsor tips for getting out more than you put in

As leaders of your organisations, building a culture of talent enablement and advocacy is a powerful legacy to leave, particularly when applied to diverse talent.

Our goal is to give you insights and tools that can be applied beyond your sponsor / sponsee relationship to your teams and organisation wide.

To reap those rewards, we recommend you:

- Make a habit of sharing what you're learning in your team meetings.
- Share the fantastic content we're going to give you with some of your personal reflections. The best way to learn is to teach.
- Go all in! That will require you to lean into the discomfort that comes when we surface our fears and insecurities, before finding the path to shift them.
- Let Yolanda know if any discomfort becomes unhelpful. Inner work can surface past traumas. Please reach out if you have any mental health concerns at any point.

Next steps

How to prepare for our first session

- Accept all the meeting requests sent for face to face and virtual workshops
- Complete the Clarity 4D personality profiling tool
- Complete your leadership reflections (sponsees only)
- Confirm access to the learning hub and check out the materials (available by Wednesday 31 August)
- Contact Yolanda with any questions

“Sponsorship is rarely something you simply turn on and off. Rather, it’s a relationship, one that has evolved from lesser to greater trust and public commitment.”

Herminia Ibarra
Charles Handy Professor of Organisational
Behaviour at London Business School

Thank you



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