



acumen*learning*

Your Strategy. Your Numbers. Your Decisions. ›



#1 Wall Street Journal & New York Times Bestseller

An MBA in under 180 pages, *Seeing the Big Picture* captures the basic principles of our training, simplifies the complexities of business, and shows you how a deep understanding of your company can help build the credibility and career you want.

Work is a big part of life, we believe it should be meaningful.

Having worked with more than one hundred thousand businesspeople in more than thirty countries, the primary lesson we've learned is that people want a meaningful career. They want to become more effective and valuable, influence decisions and earn their spot on a winning team, and contribute to a high-performance culture in ways that get noticed.

They want these things for two reasons. First, we all instinctively seek out greater engagement – a way to feel that the work we do is worthwhile and makes a difference. Second, they understand something crucial. If you want to be in a better position – a job you like more, better long-term opportunities, and greater security, for example – you need to understand how your business works, not just how your department works.

Acumen Learning specializes in business and financial acumen courses that are customized, interactive, and actionable. We teach employees how their company makes money, how to make faster and better decisions, and why their role matters. The results are employees who are more engaged – aligned, efficient, and productive – which will have an immediate and enduring impact on your company's financial performance. And companies experiencing profitable growth can provide greater opportunities for people to have meaningful careers.

That's what your CEO needs. That's what we deliver. That's our purpose.



Kevin Cope
Founder & CEO
Acumen Learning

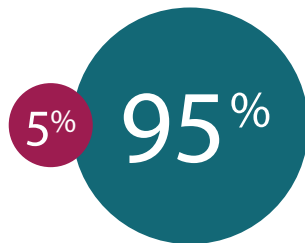


Experience – the difference.

Established:	2002
Average feedback score:	4.8 / 5
Longest client relationship:	15 years
Active clients for 5+ years:	19
Fortune 50 clients:	26
Countries served:	37

“Just because a person is “in” business, doesn’t mean that person “gets” business.”

Stephen M.R. Covey



**95% of employees
do not understand their
company’s strategy.**



**Only 1 out of every 10
employees understands
important metrics.**

Customized

A mini MBA in your company.

Customized business acumen training connects your company's current strategic initiatives and financial results to the decisions your employees make every day.

"I asked Acumen Learning to help my teams develop better financial and overall business acumen and they delivered. Smart, relevant, customized interactions that made a difference."

Chief Executive Officer
Nestle Skin Health



Interactive

Engaged learning that sticks.

Interactive and hands-on learning experiences inspire learners to have an immediate and lasting impact on your business strategy throughout their career.

"Want to transform your workforce to think like business owners? Acumen Learning can provide the strategic lever to do just that."

Global Director, Talent Management
Wesco Aircraft

Job Aids

- + *Seeing the Big Picture®*
The #1 Wall Street Journal and New York Times bestseller
- + Navigating the Financials Calculator
- + How to Listen to Earnings Calls
- + Action Plan

Actionable

Your career will thank you.

Actionable reinforcements and follow-through help learners use their business acumen to make faster and better business decisions on the job.

"Thank you for the outstanding business acumen course. I wanted to drop you a quick note to let you know that I put some of the lessons learned to work the very next day."

Business IQ® Course Graduate
Boston Scientific

Follow-Up

- + 7-, 30-, and 90-Day Facilitator Check-Ins
- + One Year of Acumen in Action Portal Access: Training in a Box
- + eLearning Review
- + Quarterly Earnings Calls
- + Accountability Partners

Part One:

The 5 Business Drivers®

Like the characters of an alphabet, cash, profit, assets, growth, and people combine in a multitude of ways to form the foundation of organization, products, market position, financing, human resources, and every other strategy or decision in a company.

We'll teach you how to set and achieve goals and obtain results in these five areas to build your credibility, career, and company.

Part Two:

Navigating the Financials™

One great advantage of the 5 Business Drivers® is that they are rooted in any company's actual financial statements. This gives them real-world applicability, so that you can quickly move from the "What?" to the "So What?" to the "Now What?"

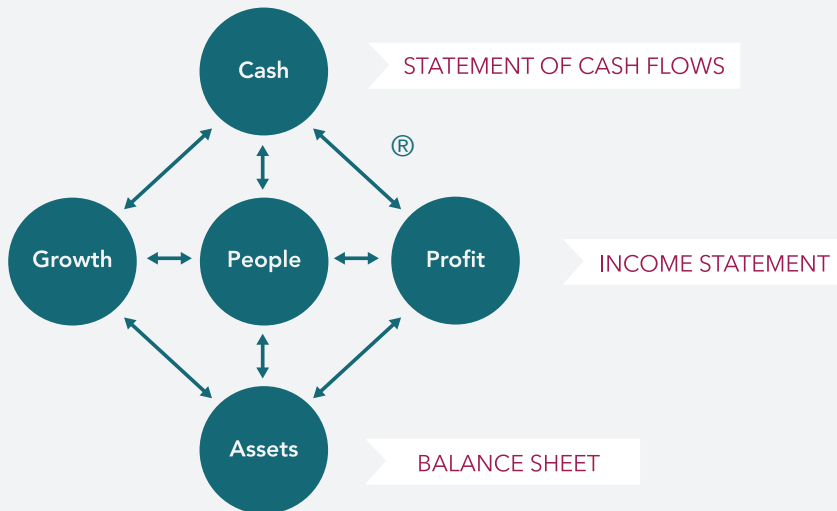
We'll de-intimidate financial statements so you know what look for and how to understand the most important data that matters to your business.

Part Three:

Acumen in Action™

To build business acumen, you need more than a course, you need a course of action - you'll need to develop and apply continued insights concerning market trends, competitive analysis, financial shifts, consumer preferences, and more.

We'll provide the tools, activities, and follow-up to help you take the lead on projects that move the needle today and throughout your career.





On-Site

Building Business Acumen®

1-, 2- and 4-day
customized courses



Remote

Business Acumen Essentials®

4-hour virtual
instructor-led course



Sales

Business IQ®

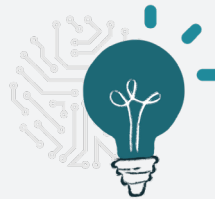
Business acumen
for sales professionals



Digital

Seeing the Big Picture® Online

Self-paced learning
for teams and individuals



Mini

Monthly & Quarterly Lessons

Training in an in-box, job aids,
and quarterly earnings calls



Certification

Train the Trainer

Finance, manager, and trainer
certifications

Start Here:

Common RFP Initiatives

Finance:

- + Increase our financial and analytical skills, to drive bottom-line results
- + Finance for non-financial managers
- + How we make money

Strategy:

- + Effectively communicate strategy, direction, and performance to leaders, peers, and teams
- + Make better, smarter, faster business decisions

Alignment:

- + Know the financial measures most important to our executive team
- + Improve performance, productivity, and engagement

Leadership:

- + Women in leadership
- + Business acumen for sales
- + Onboarding
- + HIPO/Emerging learders
- + Corporate universities
- + CPE credits for CPAs
- + SHRM & HRCI recertification

Expertise

Industries:

- + Healthcare:
Payers, providers, pharma, biotech, med-device, PBMs
- + Basic Materials & Energy:
Oil & gas, mining, renewable energy, metals, chemicals
- + Consumer Products:
Retailers, food & beverage, apparel, household products, hospitality
- + Financial Services:
Banks, life, property, and casualty insurance, accounting, consulting
- + Manufacturing & Industrial:
Aerospace & defense, automotive, equipment, construction
- + High-Tech & Telecom:
Hardware, software, cloud, cable, media and entertainment, wireless

Sponsorship:

- + Executive Management
- + HR & L&D Leadership
- + Department Heads
- + Sales & Marketing
- + Diversity Boards
- + Technologists

Course Content:

Business Acumen Intro

- + Financial Knowledge Assessment
- + Cultural Importance
- + Executive Alignment
- + Street Vendor SIM

Cash Business Driver

- + Cash & Equivalents
- + Cash Flow from Operations
- + Working Capital
 - › Receivables
 - › Payables
 - › Inventory
- + Cash Conversion Cycle
- + Days Sales Outstanding (DSO)
- + Free Cash Flow

Profit Business Driver

- + Sales/Revenues/Top Line
- + Cost of Goods Sold
- + Gross Profit & Margin
- + SG&A
- + Net Profit/Bottom Line

- + Operating Profit & Margin
- + EBIT vs. EBITDA vs. PBT
- + Earnings Per Share (EPS)
- + Variance Analysis
- + Grow Sales/Reduce Costs

Asset Business Driver

- + Return on Assets
- + Return on Equity
- + Return on Investment
- + Strength vs Utilization
- + Hurdle Rate
- + Internal Rate of Return
- + Weighted Average Cost of Capital

Growth Business Driver

- + Top-Line Growth
- + Time Value of Money
- + Operating Income Growth
- + Product Life Cycle
- + Operating Leverage

- + Organic vs Inorganic Growth
- + Merger & Acquisition Growth Trade-offs
- + Total Shareholder Return
- + Return on Invested Capital

People Business Driver

- + Internal Customers
- + External Customers
- + Anticipating Customer Expectations
- + Shareholders

Executive Alignment

- + Linking the Five Drivers
- + Letter to Shareholders
- + Alignment Strategies
- + Executive Communication
- + "Think Like Owners"
- + CEO Urgency Continuum
- + Margin & Mission

Navigating Financials

- + Financials 101
- + Form 10-K key items
- + Reading Annual Reports
- + Trends & Ratios
- + Competitor/Customer/Supplier Analysis

P&L

- + Variance Analysis
- + P&L Analytics
- + OpEx v Non-OpEx
- + Earnings Per Share
- + Executive Decisions & Interpretations
- + Fixed vs Variable Expenses
- + Operating Leverage

Balance Sheet

- + Current Ratio
- + Debt to Equity Ratio
- + Liquidity Report Analytics
- + Assets & Liabilities

- + Efficiency Analysis

Cash Flow Statement

- + Cash from Operating Activities Analysis
- + Non-Cash Adjustments
- + Cash Flow from Operations
- + Free Cash Flow
- + Capital Allocation Strategy

External Acumen

- + Recognize Market Opportunities
- + Risk Mitigation

Functional Awareness

- + Corporate Culture
- + Networking Strategy

Stock Price Analysis

- + Price-Earnings Ratio
- + Buy-Back Strategy
- + 7 Benefits of a Higher Stock Price

Economics

- + Opportunity
- + Roles of Prices & Profits
- + Economic Value Add

Corporate Strategy

- + Success Measures
- + Executive Decision Making
- + SWOT Analysis
- + External Focus
- + Value Creation
- + ROIC vs WACC
- + Networking Strategies
- + Building a Winning Culture
- + Communication Solutions
- + Teamwork
- + Innovation
- + Execution

Action Plan

- + Value Creation and Integration
- + Personal SMART Goal

Course Modules:

1 2 4 R O

●	●	●	●	●	The 5 Business Drivers®
●	●	●	●	●	Navigating the Financials™
●	●	●	●	●	Acumen in Action™
●	●	●	●		Executive Alignment Activity
	●	●			Functional Awareness Activity
	●	●			Innovation & Execution Activity
	●	●			External Acumen Activity
	●	●			In-depth Company Analysis Activity
		●			Company Case Studies Activity
		●			Learning Journal Activity
		●			Leadership Challenge Activity

Modalities:

1	1-Day
2	2-Day
4	4-Day
R	Remote
O	Online

The CareerBuilder Story

What would our business look like if we trained one thousand sales, marketing, and customer service professionals to be more business savvy?

A fast-paced tech company with an entrepreneurial spirit, CareerBuilder had no problems recruiting talented young professionals to join their sales and marketing team, but many lacked the skills needed to engage executive buyers.

Too many reps were stuck in “features and benefits mode” because they didn’t have the business acumen needed to sell ideas and insights – and sales managers were left wondering why they weren’t winning bigger deals.

Two simple words, “trust” and “advisor” had combined to become the yardstick by which client vendor relationships were being measured.

Selling to executives required trust – trust that you’ll do the right thing, trust that you know your business and theirs, trust

that you’ll help them succeed, trust that committing to your business in the long-term is more profitable than committing to the competition.

CareerBuilder recognized that their sales reps couldn’t reach the status of trusted advisor if they didn’t have strategic, financial, and business acumen.

With a clearly defined challenge and a goal to train one thousand sales and marketing reps to be business advisors, CareerBuilder partnered with Acumen Learning.

CareerBuilder’s plans were aggressive, sixteen sessions were completed in the first year alone, and since that time over 1,000 sales, marketing, and customer service professionals have been trained.

The net promoter score for the course averaged 85 making it one of CareerBuilder’s top offerings.

“I didn’t think this course would apply to me, but I am so glad I was part of this! This course taught me how my role can cut costs and generate revenue. It was fun, relatable, and extremely engaging.”

Problem Manager



The Verizon Story

When the accepted data says that most mergers and acquisitions don't live up to shareholder expectations, how do we beat the odds?

When Verizon bought out Vodafone's 45% stake in Verizon Wireless for \$130 billion it gave Verizon full ownership of the leading wireless network in the U.S. In light of one the most expensive acquisitions ever, the executive team was anxious to generate shareholder value and integrate the two organization's cultures quickly. Learning and development was called upon to integrate the different talent initiatives spread throughout the two organizations into a unified human capital strategy that would help make the acquisition the competitive advantage the executive team was counting on.

After a thorough review of all employee development initiatives, business acumen was identified as a critical competency for Verizon employees. But this wasn't anything new, both Verizon

and Verizon Wireless had business acumen programs. Verizon was using a simulation with their Senior Leaders and Verizon Wireless was using Acumen Learning's Building Business Acumen program as part of their new store manager training. The learning and development team weighed multiple options, from keeping both programs to developing an in-house solution.

While Verizon's simulation was robust, reprogramming it to account for the acquisition proved to be cost prohibitive and internal training resources didn't have the time, nor the resources, to build a business acumen course. In the end, Acumen Learning was chosen to expand their course to all new managers and to develop a new Senior Leader course focused on driving shareholder value.

Acumen Learning moved fast, the programs were designed and delivered within an aggressive two-month window and gained momentum quickly, reaching 2,420 managers and 1,840 senior leaders within a year's time frame. Additional programs were added later to address the unique needs of Verizon's top VARs and HR business partners.

"Very engaging. Made financial information, which can be very boring, interesting."

Senior Manager

verizon✓

The Anthem Story

How do we support our executive's strategy to ensure long-term growth and success as well as meet the short-term expectations of our shareholders?

Anthem was formed by the completion of a merger between WellPoint Health Networks and Anthem Insurance. At the conclusion of this merger the focus of the executive leadership team turned toward the development of a strategy to ensure the long-term growth and success of the newly formed company as well as meeting the short-term expectations of shareholders.

A key component of this new strategy was the creation of a workforce capable of leading a healthcare revolution. Leaders throughout the organization began to realize that in order to achieve this vision they needed to gain a deeper understanding of the company's strategy, the external factors driving the strategy, and how their decisions and actions impact that strategy.

"Our journey to identify a solution began serendipitous," explained Todd Harrison, Director of Leadership and Associate Development at Anthem, "I received an e-mail from Acumen Learning outlining a process that would help all associates recognize business opportunities, make better, faster, and smarter decisions, and deliver a bottom line outcome. And they delivered on that promise. We have compared people who have been to the training with those who haven't, and we can see the difference in the numbers. It's very clear, those who have gone through the training gain a better understanding of how our company operates and they're producing and getting better results."

Anthem's Manager Effectiveness Scores (an annual measure performed by Anthem) showed a 50% improvement of those who attended the training compared to those who had not.

Since inception, Anthem has weathered changes from the Affordable Care Act to increasing M&A trends. With each industry shift, Acumen Learning has been there to help develop business leadership.

"We exceeded the expectations of our team, measuring a 6% improvement in productivity."

Chief Learning &
Performance Officer

Anthem®



The Philips Healthcare Story

If we created lean end-to-end value chains and improved our customer focus by engaging more with executive buyers how would that change the game?

Philips Healthcare faced a critical market shift where equipment purchase decisions were no longer being made by physicians or at the department level. With increasing pressure to get costs out of the system, decisions were starting to move to the executive suite.

Philips partnered with Acumen Learning to develop a business acumen training program that would institutionalize a client-centric mindset. As a result of this training, the company's salespeople have gained a greater understanding of healthcare economics and the business of hospitals, as well as the financial challenges that hospitals face.

The results for Philips have been tangible, a clinically trained nurse with fifteen years experience who had

transitioned into sales, had successfully sold devices to nurses, physicians, and department heads for years, but she was increasingly running into business questions that she couldn't answer or didn't understand.

After her business acumen training, she reported that one of her customers was having problems with re-admission rates. Under the Affordable Care Act, a hospital can't be reimbursed if a patient is re-admitted for the same condition within 30 days. Some Philips solutions have algorithms built in that can detect and prevent many of the issues that lead to re-admission.

In the past, these features were sold as a patient benefit, but rather than sell the traditional way (i.e., by selling nurses on

the technical benefits of the solution), she approached the Chief Nursing Officer. Using her newfound business acumen skills, she demonstrated how Philips Healthcare solutions could save the hospital 30% on re-admission costs and directly impact their bottom line.

She won the deal.

"Acumen Learning consistently scored and rated head and shoulders above the others. They did deep research on our company and our competitors. They knew the industry."

Director of Marketing

PHILIPS

300% ROI Report

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A leader in the aerospace and defense industry partnered with Acumen Learning to customize and deliver their Building Business Acumen® course. To assess the results of this training, MetrixGlobal evaluated how well employees applied what they learned and the impact on their organization.

A leader in the aerospace and defense industry recognized a need for business acumen training and partnered with Acumen Learning to customize and deliver their Building Business Acumen® course. To evaluate the results of this training the company hired MetrixGlobal to evaluate how well employees applied what they learned and to measure the impact that these actions had on their organization.

Overall two-thirds of the participants applied what they learned, resulting in improved performance, increased engagement, and higher productivity. It's estimated that these benefits produced more than a 300% return on investment.

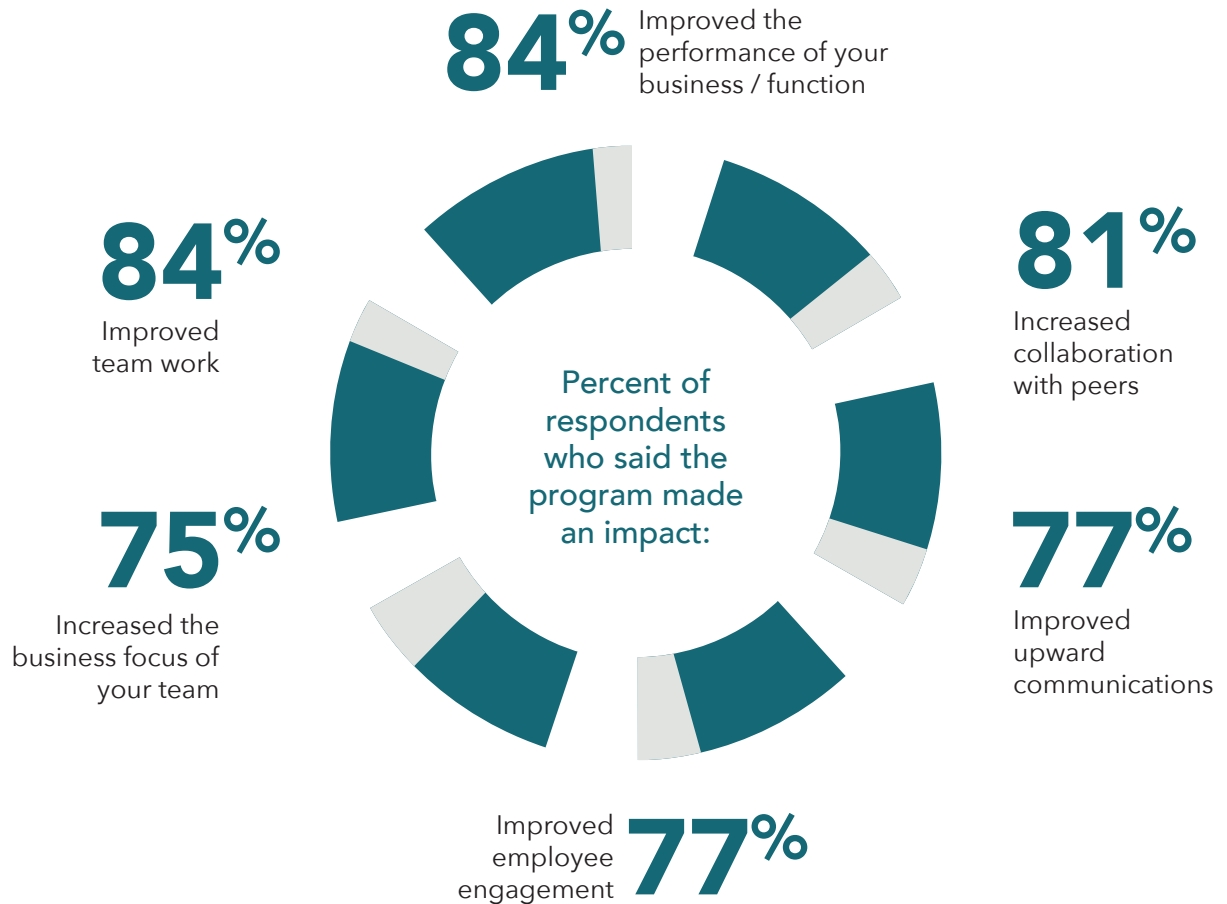
The centerpiece of this evaluation was a web-based survey designed and conducted by MetrixGlobal. This survey was administered to participants who completed the workshop several months prior to the survey so that there was sufficient time for them to apply what they learned from the program and for these actions to have impact. Of the 66 people invited to participate in the survey, 36 responded for a response rate of 55%.

The respondents were asked about their key learnings that have stayed with them over the months that have passed since they took the workshop. Respondents stated their agreement or disagreement with each statement according to a 6-point scale.

Almost all of the respondents (97%) now better understand the company's financials and have gained greater confidence in reading financial statements (83%). About three quarters of the respondents now find that the CEO's business decisions are clearer to them (78%), have a better understanding of how to communicate financials to others (78%) and gained insights into how their actions impact the company's financials (75%).

Especially noteworthy was the impact on improving the performance of the business or function (84% significant or some impact), improving teamwork (84%) and improving employee performance (84%).







acumen*learning*

Let's Talk.

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🐦 @acumenlearning
🌐 www.acumenlearning.com

"The feedback from attendees was that this was the best financial course they have ever taken. Acumen Learning did a very good job of linking the training to real life examples that people understand."

Regional Vice President
FedEx

"Really great course with all the materials linking back to Medtronic's data and financials. The specific examples, insights, and comparisons to other companies were really helpful and thought provoking."

Senior Program Manager
Medtronic

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