



LEAD - VP TRACK Q1S1

Learn, Engage, Apply, & Develop

BRIDGE
INVESTMENT
GROUP

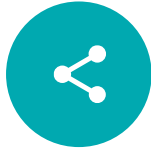
Executive Guest Speaker:



David Coelho

SMD – Development and
Opportunity Zones

LEAD - VP TRACK



Q1 - Strategic Thinking and Implementation

- Understanding the impact on business
- Generating practical solutions
- Business planning



Q2 - Data Driven Story Telling

- Advance public speaking and presentation skills
- Enhance executive communication skills
- Develop a 2-min elevator pitch



Q3 - Goal Setting, Performance Mgt. & Team Culture

- Leading your people towards their goals
- Boost your conflict management skills
- Create a culture of Belonging



Q4 - Elevating Leadership Brand

- Master your leadership style
- Polish your executive presence
- Develop your personal brand



SESSION TAKEAWAYS



Strategic Business Planning Frameworks

Gain a deeper understanding of aligning organizational goals with actionable strategies.



Critical Thinking Skills

Examine underlying assumptions and biases while synthesizing data to arrive at an objective outcome instead of taking information at face value.



SWOT Analysis

Understand the strategic framework for identifying and analyzing the internal and external factors that can impact the success of a project, initiative, or company strategy.



Anticipating Marketing Trends

Cultivate a mindset of curiosity and openness while embracing ambiguity and adaptability allowing for new insights and quick pivots in challenging times.



PERFORMANCE EXPECTATIONS

	Sets a positive example inside and outside of the office	DEI & B Mindset	Proven solid relationships across Org	Exhibits Accountability	Ownership in Area of Expertise	Critical Thinking Skills
Associate III	✓	✓	✓	✓	✓	✓

	Skilled communicator with solid people and project mgt skills	Self-initiator in area of specialization	Proven time mgt skills	Capable of contributing to strategy for area of expertise	Drives high levels of teamwork	Aware of and incorporates ESG & DEI+B best practices
Vice President	✓	✓	✓	✓	✓	✓

Critical Thinking Framework

Analytical

- Questions about numbers
- Where's the data from?
- How can you confirm?
- Are you sure you interpreted the data correctly?

Intuitive

- Where does this get us?
- What's the bottom line?
- Why are we doing this?
- Is there an alternative resolution?

Functional

- What's the process?
- Where do we start?
- How long will it take?
- Who does what?

Personal

- Who will be involved?
- Who will be affected?
- Is this inclusive?
- Are diverse populations represented?

Strategic Planning

Strategic planning is not just a theoretical exercise but a critical business practice that influences nearly every aspect of a company's performance and prospects. Its role in setting direction, managing risks, optimizing resources, and fostering innovation is invaluable for achieving long-term success and competitiveness.



Poll

How often have you used the SWOT Analysis method in the past 12 mths?

- A. 0 – 2
- B. 3 – 5
- C. More than 5 times



SWOT Analysis Framework

Strengths

Internal attributes and resources that support a successful outcome.

Opportunities

External conditions that could be exploited to your advantage.

Weaknesses

Internal factors that may hinder the achievement of an objective.

Threats

External challenges that could cause trouble for the project or business.

Group Discussion

1. Check your email, open the pdf: “Scenario 1: Adapting to Change”

2. Open the pdf: “Strategic Business Planning Frameworks”

3. As a group, we will discuss the SWOT Analysis Process

4. To Wrap-up, we will discuss “Anticipating Market Trends”

Scenario: "Adapting to Change: The Shift at SummitView Real Estate"

Background:

SummitView Real Estate, a mid-sized residential real estate firm, has been experiencing declining sales and market share due to an unexpected downturn in the local real estate market. The downturn is attributed to a combination of rising mortgage rates, economic uncertainty, and changing consumer preferences towards home ownership. Traditional sales strategies and operational frameworks that once yielded success for SummitView are no longer effective in the current market conditions.

Challenge:

The leadership team at SummitView realizes the need to pivot their strategy to not only survive the downturn but to position the company for future growth. They recognize the necessity of exploring new markets, customer segments, and service offerings but are uncertain about how to approach this transformation effectively.

Objectives for the Breakout Session:

Identify Frameworks for Pivoting: Review and discuss which framework would work best to guide the pivot process, such as: one of the 8 Strategic Business Planning Frameworks.

Analyze Current Position: Use the frameworks to analyze SummitView's current position in the market, identifying core competencies, vulnerabilities, and untapped opportunities.

Ideate on New Directions: Brainstorm potential new directions for SummitView. This could include diversifying into commercial real estate, developing a property management division, investing in real estate technology, or focusing on niche markets like eco-friendly properties.

Develop a Pivot Plan: Formulate a strategic pivot plan that outlines key steps, milestones, resources required, and potential risks. The plan should also specify how the company will measure success and adapt the strategy based on feedback

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The background of the slide is a light blue-grey color, scattered with numerous small, light-colored wooden blocks. Each block has a black question mark printed on its top surface. The blocks are arranged in a somewhat random pattern, creating a textured, question-oriented background.

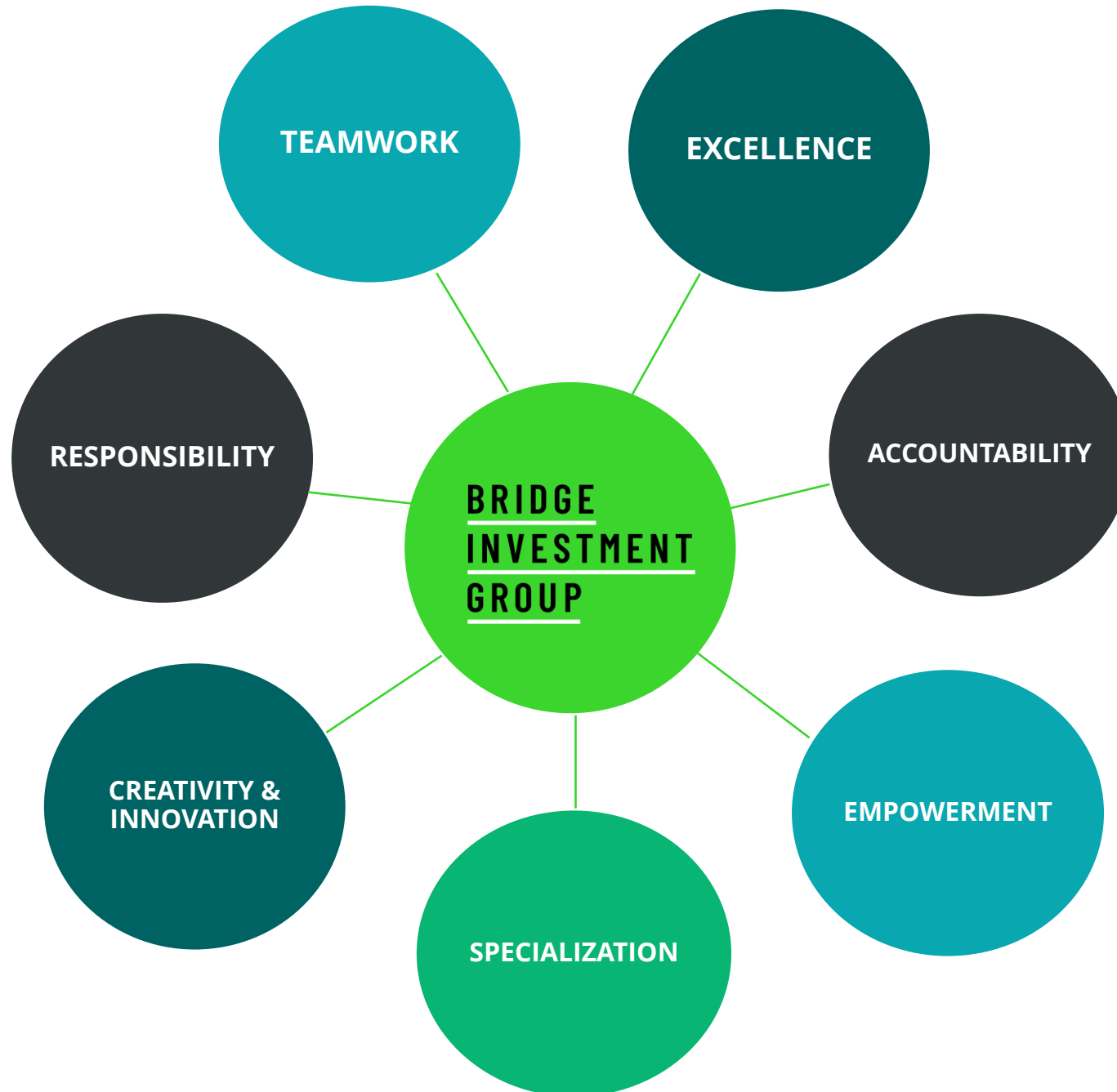
QUESTIONS?

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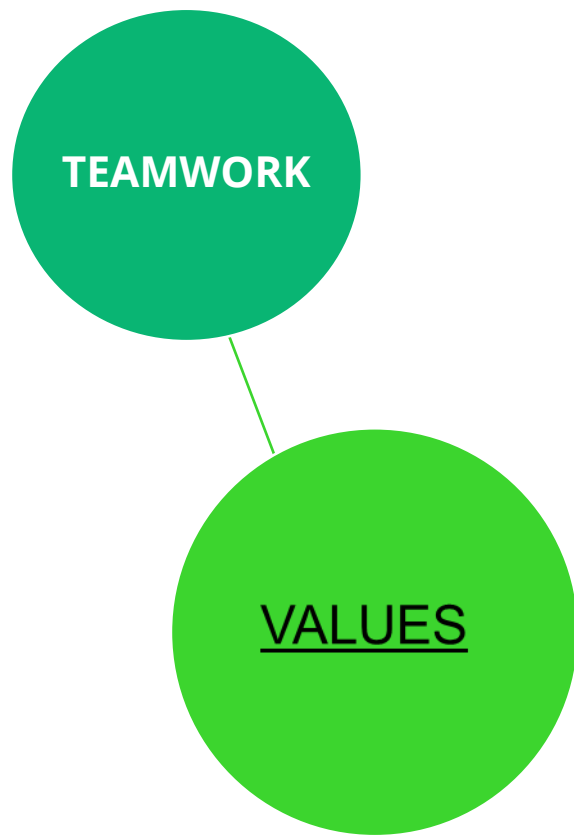
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APPENDIX

ONE BRIDGE - Living Our Values

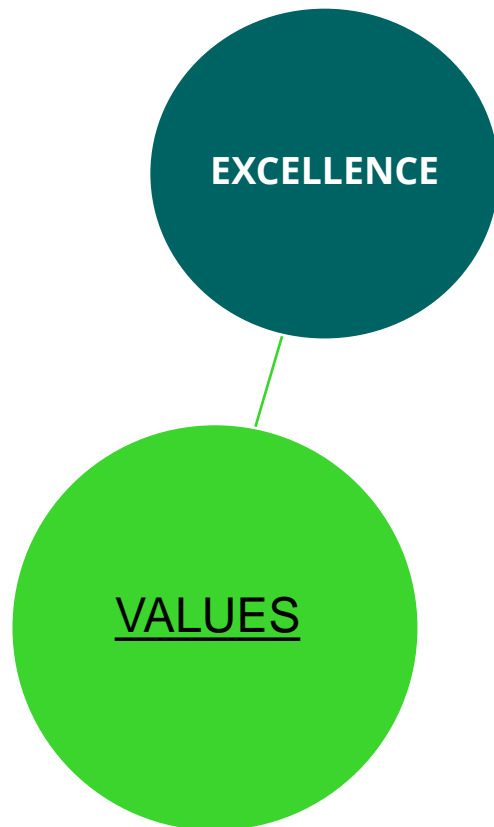


ONE BRIDGE - Teamwork



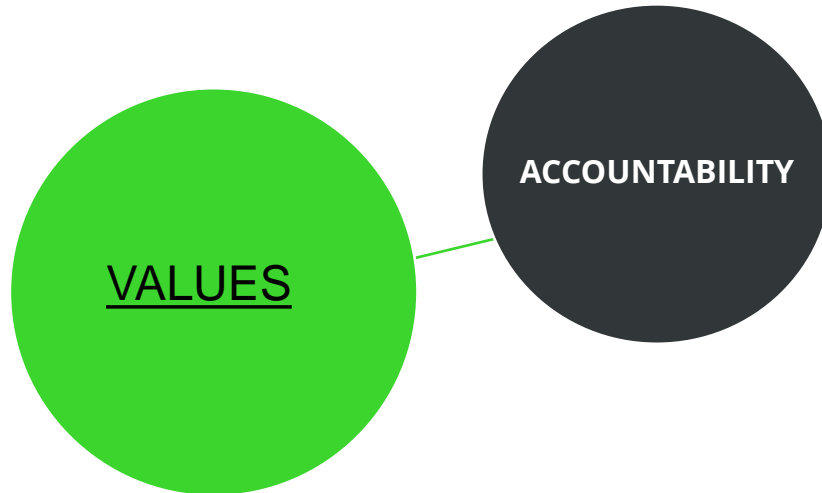
- We emphasize teamwork in everything we do.
- We thrive on collaboration, hard work and open and honest communication.

ONE BRIDGE - Excellence



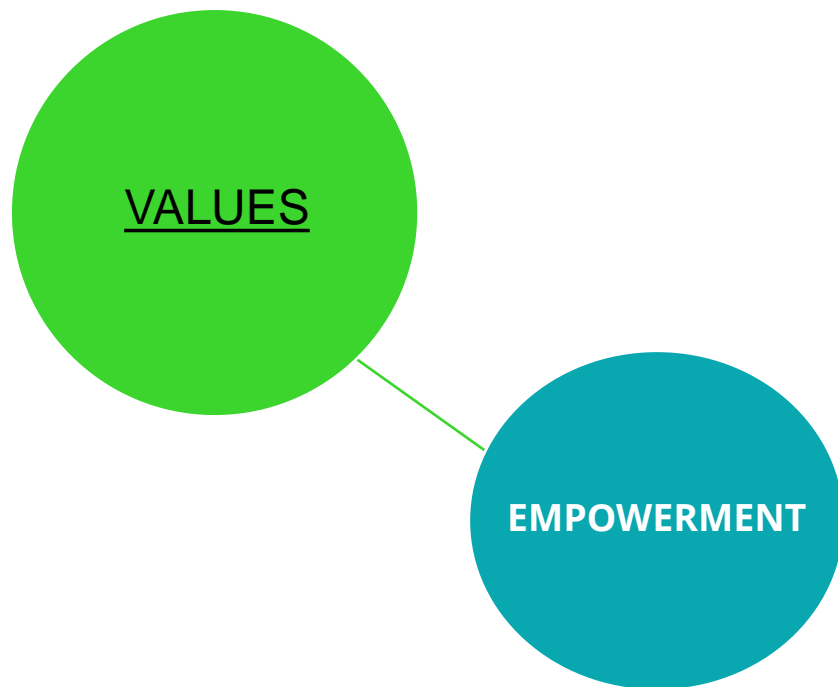
- We strive to be the best performing firm in our industry.
- We take pride in our performance and celebrate our achievements.
- We do what is right – for the right reasons.

ONE BRIDGE - Accountability



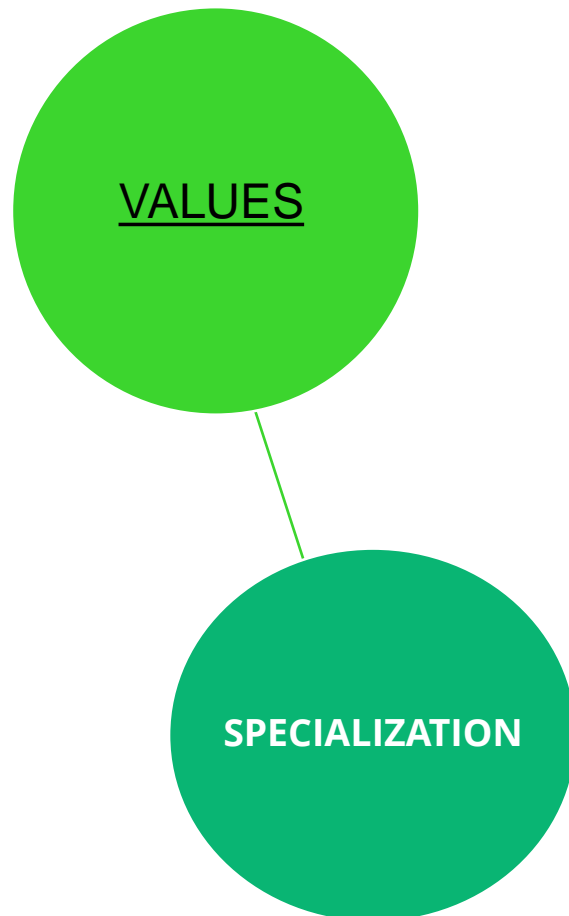
- We stand behind our word and strive for continuous improvement in all that we do.
- We face facts and realities, and we embrace challenges.

ONE BRIDGE - Empowerment



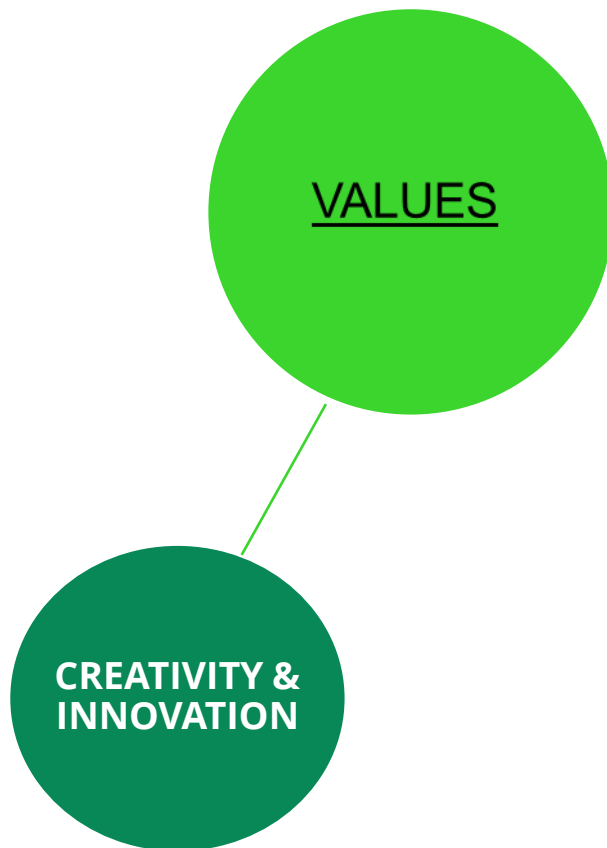
- We empower our people to reach their full potential.
- We cultivate a diverse and inclusive culture of disciplined analysis and action.
- We believe that diversity is the only path to superior performance.

ONE BRIDGE - Specialization



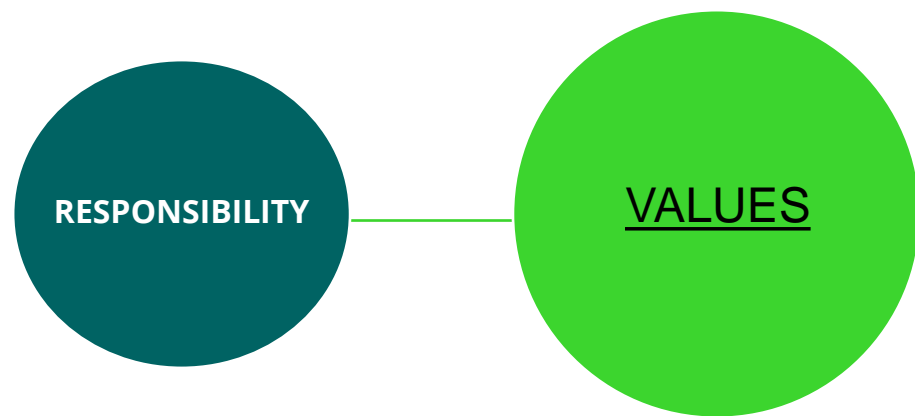
- We develop specialized investment and operating teams which have deep sectoral knowledge of the areas in which we invest.
- We use data, carefully analyzed and fully vetted, to complement decades of experience, in guiding our investment decisions.

ONE BRIDGE - Creativity & Innovation



- We consistently reexamine how we operate and seek innovative solutions to improve our performance, at the asset level, at the Fund level and at the corporate level.
- New ideas are carefully examined and adopted if appropriate.

ONE BRIDGE - Responsibility



- We invest and operate responsibly and believe that strong corporate and individual citizenship go hand-in-hand.
- We understand that responsible investing does not sacrifice returns but should in fact enhance risk and return characteristics through deliberate and thoughtful integration of environmental, social and governance best practices.