



LEAD - VP TRACK Q3

Learn, Engage, Apply, & Develop

BRIDGE
INVESTMENT
GROUP

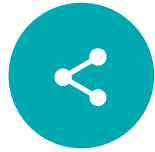
Executive Guest Speaker:



RACHEL DILLER

Senior Managing Director, Acquisitions
& Chief Investment Officer, Bridge
Workforce & Affordable Housing

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 1-min elevator pitch



Q3 – Goals, Performance Mgt. & Team Culture

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



Q4 – Elevating Leadership Brand

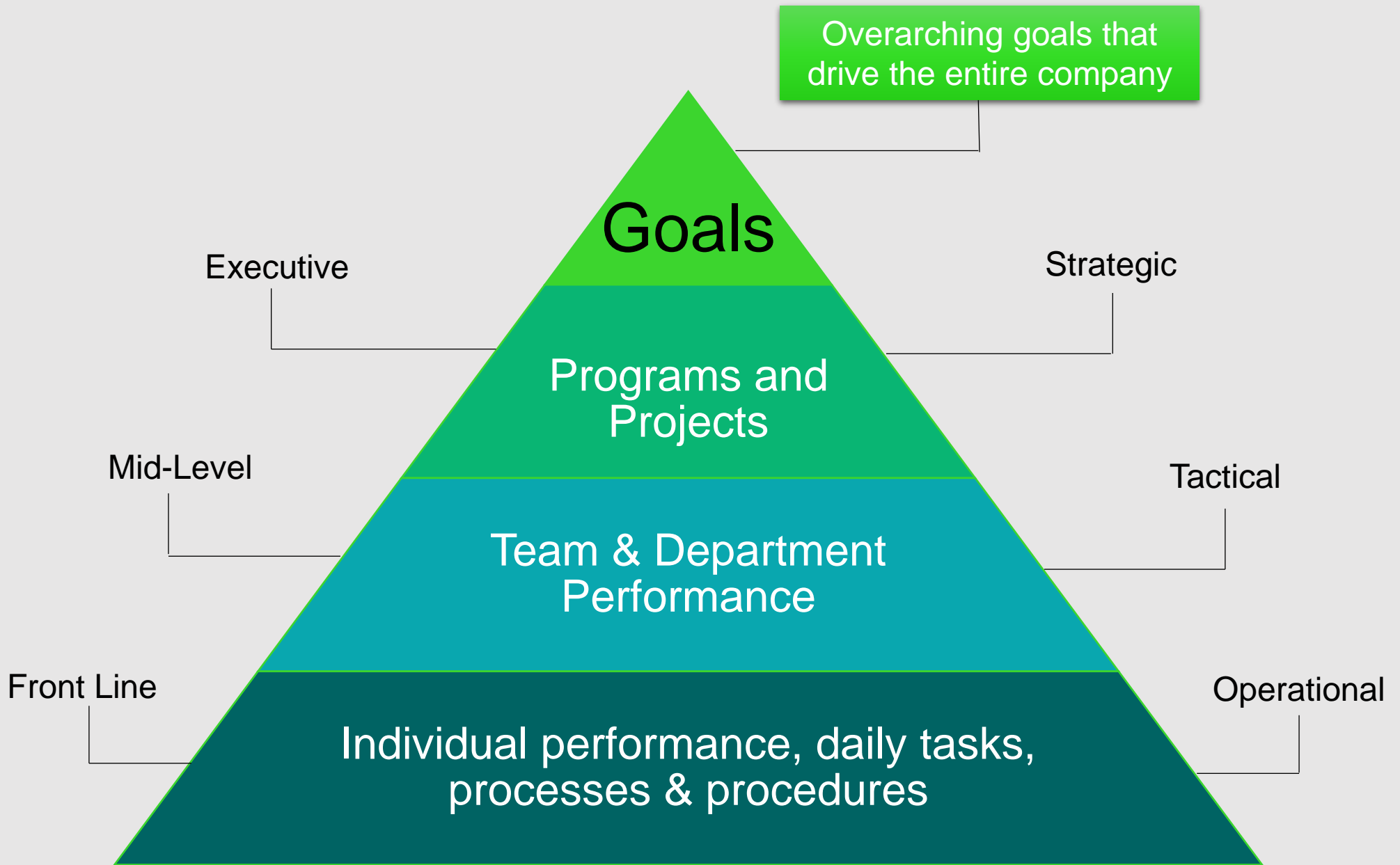
- Master your leadership style
- Polish your executive presence
- Develop your personal brand

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 & 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
VP	✓	✓	✓	✓	✓	✓

THE GOAL PYRAMID



COMPANY OBJECTIVE

Align Your Goals & Tasks

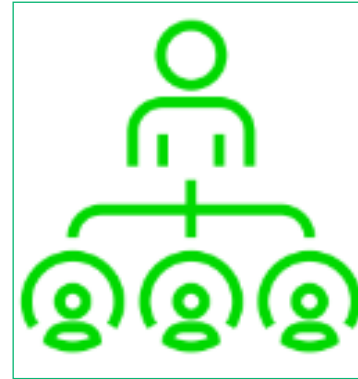


DEFINE GOALS BY TYPE

Communication goal



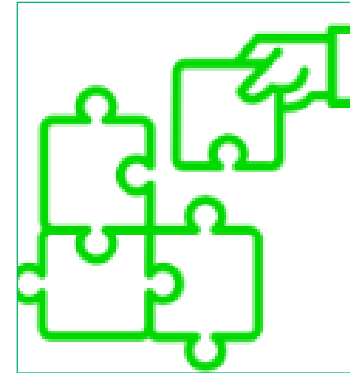
Management goal



Productivity goal



Problem-Solving goal



Learning goal



Creativity goal



Goal Examples

Communication Goal for You:

Vague

"I want to improve my communication with the team."

SMART

"I will provide clear, concise project updates to the team every Monday via email, summarizing key tasks, deadlines, and responsibilities, and ask for feedback during our weekly Wednesday meeting."

Goal Examples

Communication Goal for Your People:

Vague:	"You need to communicate better with your colleagues."
SMART	"In the next month, I'd like you to improve communication with your colleagues by actively participating in weekly team meetings. Share progress updates on your tasks and ask at least one question or provide one suggestion during each meeting."

Goal Examples

Management Goal for You:

Vague

"I want to be a better manager."

SMART

"In the next 60 days, I will conduct weekly check-ins with my team to provide feedback on their performance and ensure they have the resources needed to meet their deadlines. I will also ask for feedback on how I can better support them."

Goal Examples

Creativity Goal for Your People:

Vague	"I'd like to see you be more creative in your work."
SMART	"In the next month, I'd like you to propose at least two new ideas for improving our current project workflow or suggesting new ways to engage clients. We'll review your ideas during our bi-weekly team meetings."

NEXT SECTION:

Performance Mgt. and Team Culture

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PURPOSE OF PERFORMANCE MANAGEMENT

STRATEGIC PURPOSE

How effective performance helps Bridge achieve the business objectives.

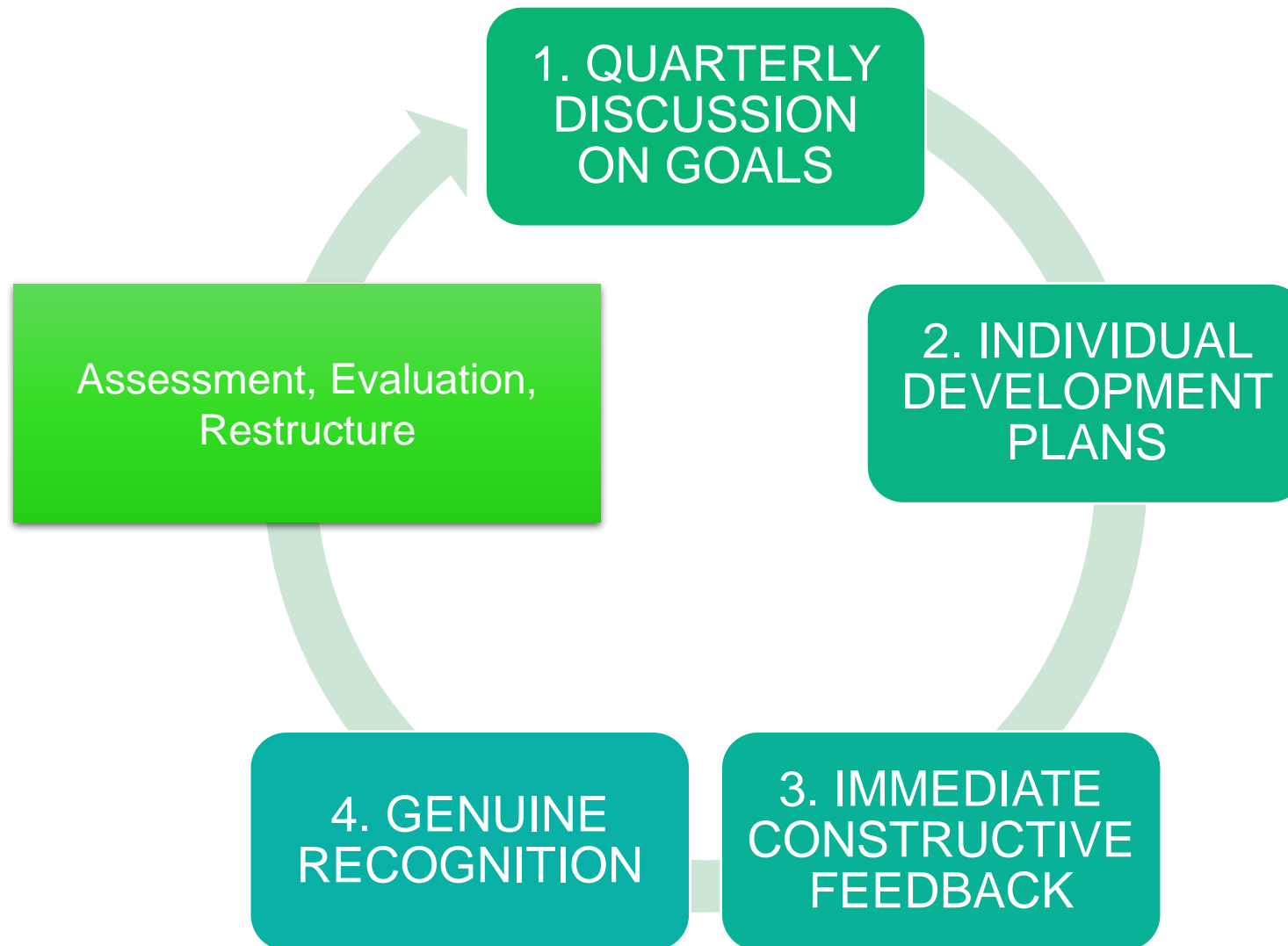
ADMINISTRATIVE PURPOSE

How managers use information & data for day-to-day decisions about bonuses, promotions, and terminations.

DEVELOPMENTAL PURPOSE

How the framework serves as a basis for developing and polishing employees' knowledge & skills on a continuous basis.

PERFORMANCE MGT PROCESS



FROM Q2: PREPARE YOUR SPEECH

Step 2: Structure The Content

PLAN

- Research
- Organize and structure the content
- Develop objectives

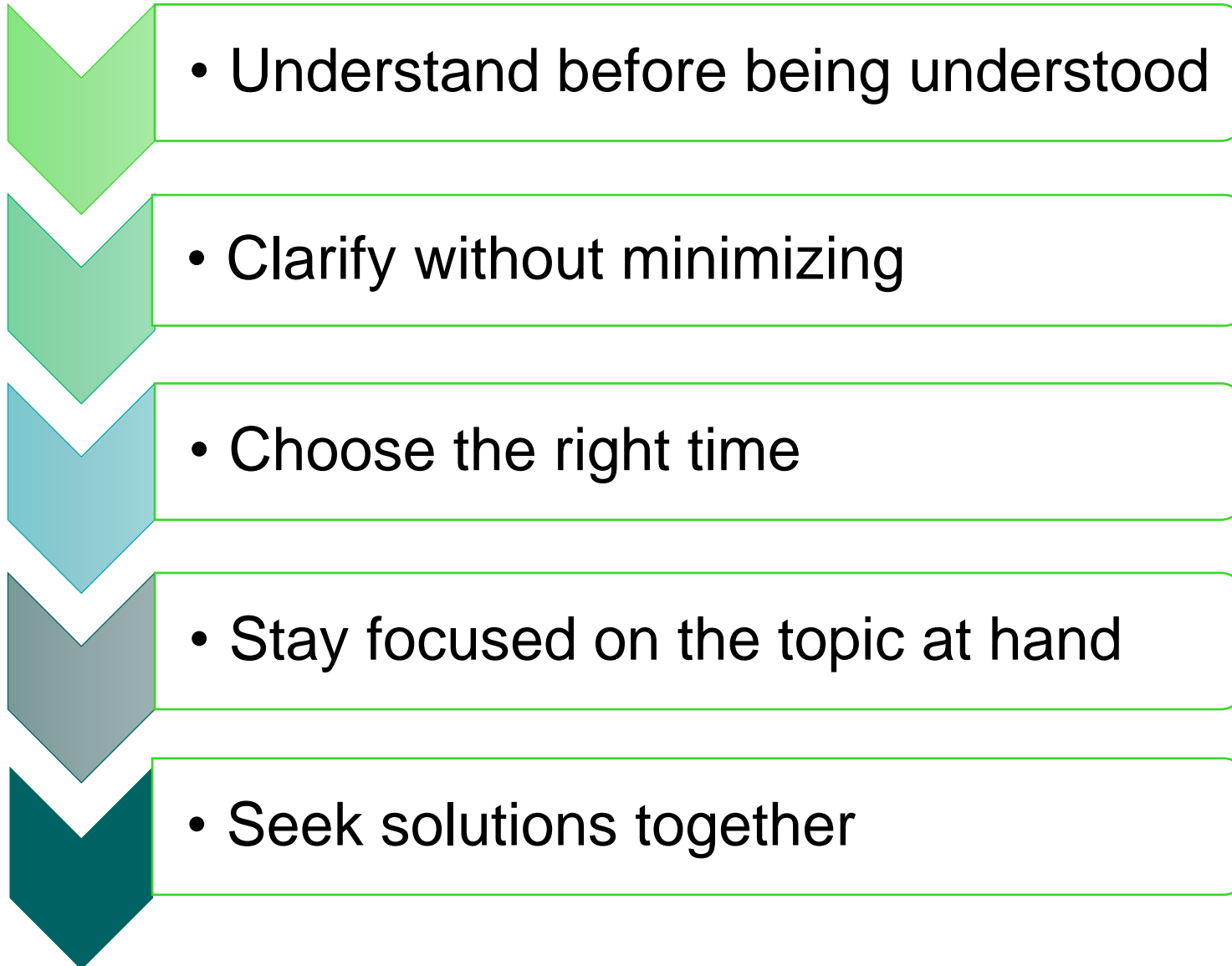
WRITE

- Adapt the message to your audience
- Write, delete, rewrite

COMPLETE

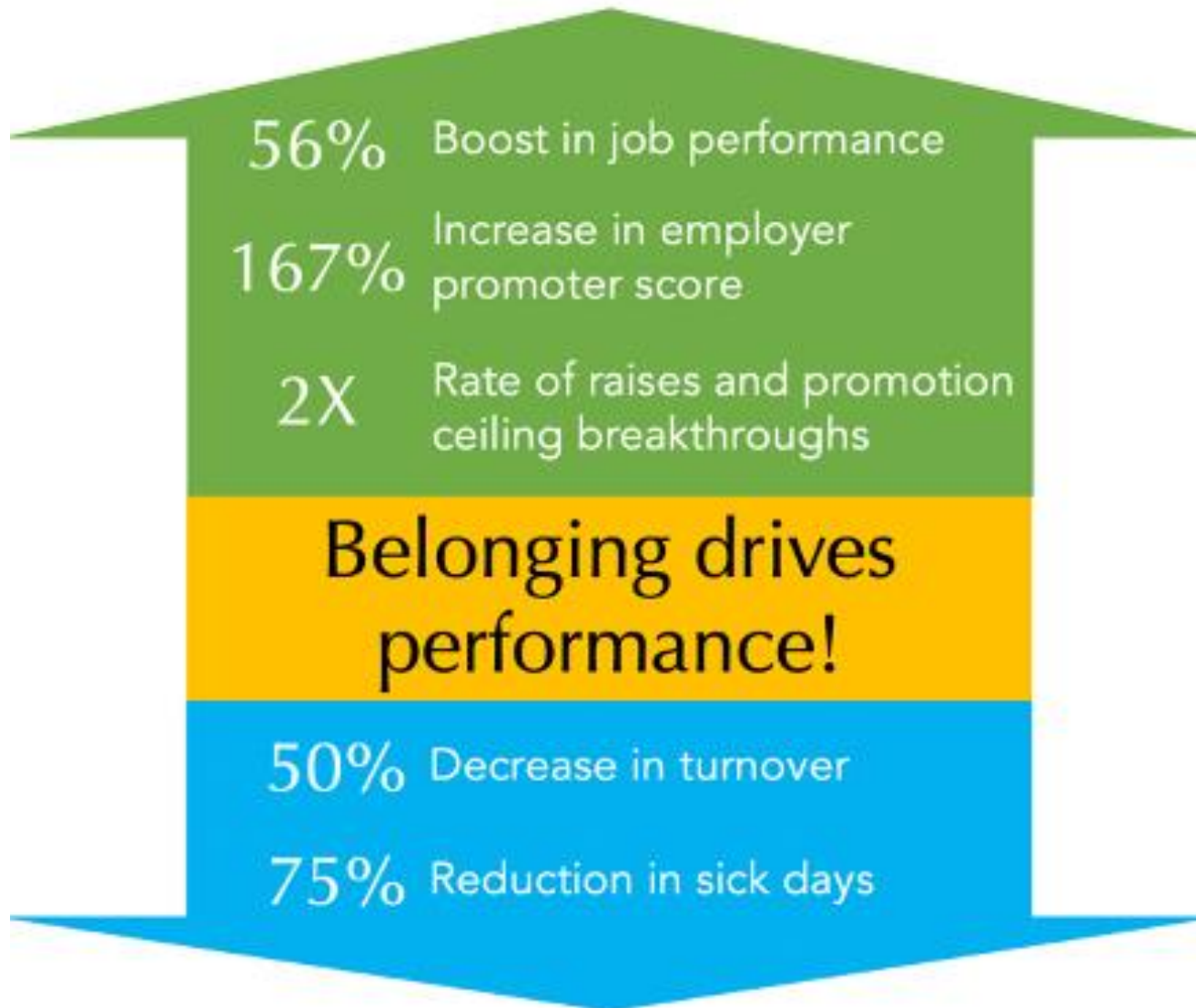
- Decide on takeaway's and repeat in the closing
- Practice the timing
- Practice your delivery

TIPS FOR DIFFICULT CONVERSATIONS

- 
- Understand before being understood
 - Clarify without minimizing
 - Choose the right time
 - Stay focused on the topic at hand
 - Seek solutions together

TEAM CULTURE

IMPACT OF FEELING LIKE YOU BELONG



TEAM CULTURE

IMPACT OF FEELING LIKE YOU BELONG



FOSTER A POSITIVE TEAM CULTURE



- VALIDATE AND DEMONSTRATE APPRECIATION FOR ALL IDEAS



- ASK FOR INPUT ON TEAM PROJECTS



- ENCOURAGE AND SUPPORT LEARNING & DEVELOPMENT

PERFORMANCE EXPECTATIONS

	Skilled communicator with solid people & 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
VP	✓	✓	✓	✓	✓	✓
	Successfully Manage Managers and Processes	Strong Executive Presence	Setting and Presenting Strategies	Highly Skilled in area of Expertise and Specialization	Able to leverage ESG & DEI+B	Capable of leading High Performing Teams
Director	✓	✓	✓	✓	✓	✓

WRAP-UP: WHAT WE COVERED



Leading Your People Towards their Goals

- The Goal Pyramid
- Explain the connection of daily tasks to projects
- Align goals with business objectives




Boost Conflict Management Skills

- Understand the Performance Mgt Process
- Plan your discussion by Preparing Your Speech
- Practice Tips for Difficult Conversations



Maintain a Positive Team Culture

- Foster a sense of Belonging for your People
- Ask for input on projects
- Encourage & support Learning & Development



QUESTIONS? COMMENTS?

Q3 - Goals, Performance Mgt., and Team Culture

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APPENDIX

Communication goal – communication is probably on your employee's plan. Still, this one needs to be a continuous goal; it belongs to the essential behavioral objectives. What about team meetings with everyone speaking for at least five minutes? Improving soft skills is the icing on the cake!

Productivity goal – it's easy to measure but hard to differentiate. For this one, for example, you should be able to customize it as a team or an individual goal. Be clear and realistic with deadlines to avoid excessive pressure. Some people like to have a short time to deliver, others prefer to have longer periods.

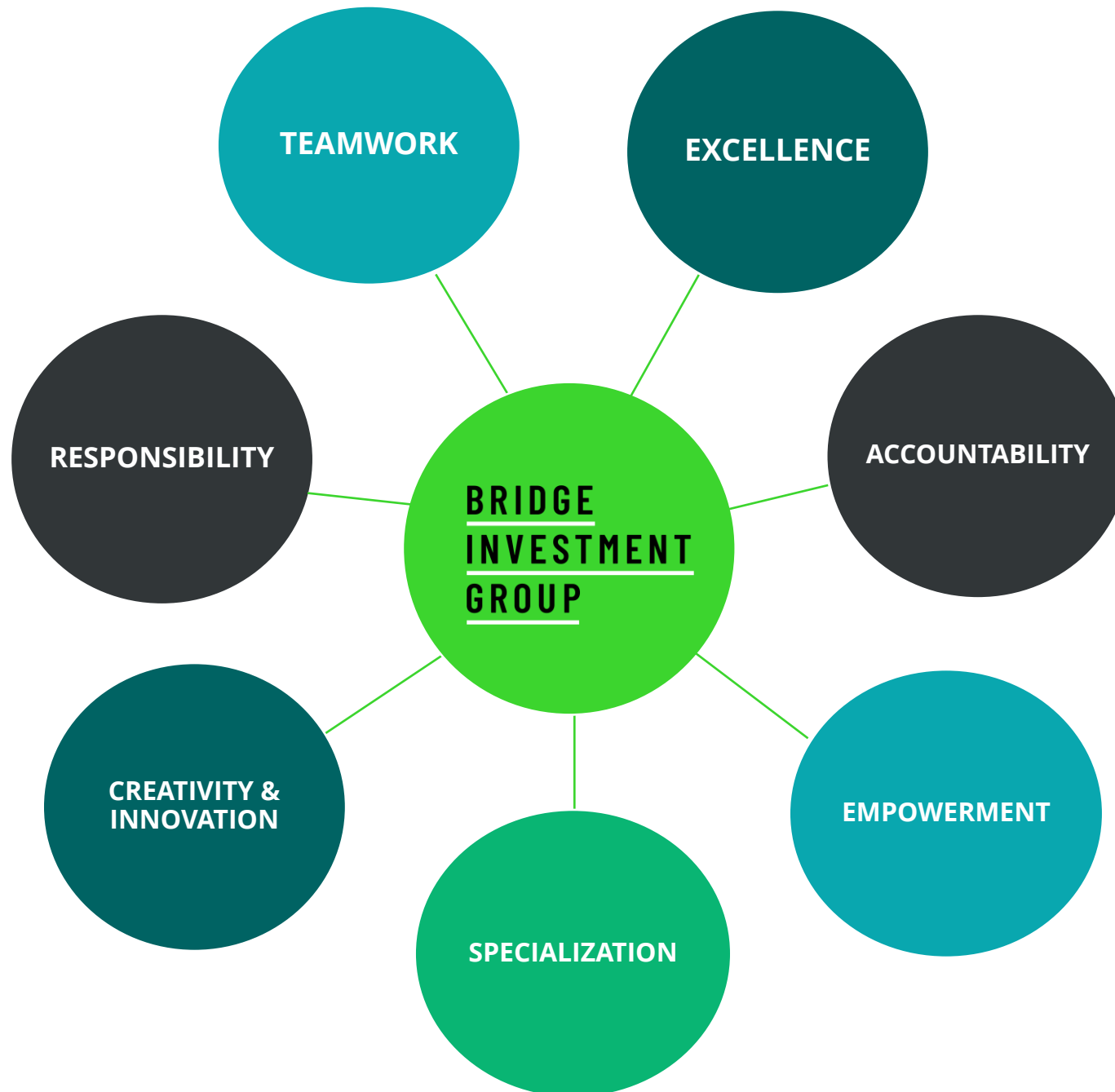
Learning goal – perhaps this is the most loved goal. Learning something new is always a good feeling and investment, but you should know who needs what, right? An e-learning library with different categories is the solution chosen today by hundreds of companies.

Creativity goal – luckily, being creative has lately become more and more important. All the best companies know that having creative employees is the key to success. But, how to spark their motivation wonderfully? You can set this goal as personal development or a team one; it can be based on critical thinking activities or new creative challenges. In case you haven't already focused on this goal, it's about time.

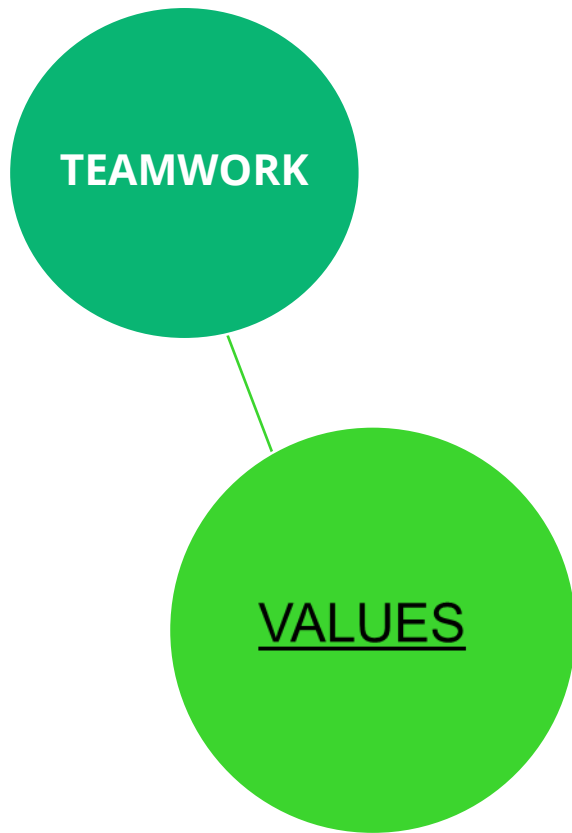
Problem-solving goal – solving problems has something to do with the creative goal. Being a good problem solver doesn't have to be necessarily in our DNA; it's something that we can learn via training or imitating others. It's also an attitude, a precious one. Ensure that your employees have the right amount of time to develop this one.

Management goal – management skills are always a company priority. You can consider this a broad goal that includes more detailed ones like time management, project management and team management. Asking your employees to have a list of priorities every week is an excellent example of these types of goals. You can also consider an efficiency goal linked to management skills. Instead, people management can be under communication goals.

ONE BRIDGE - Living Our Values

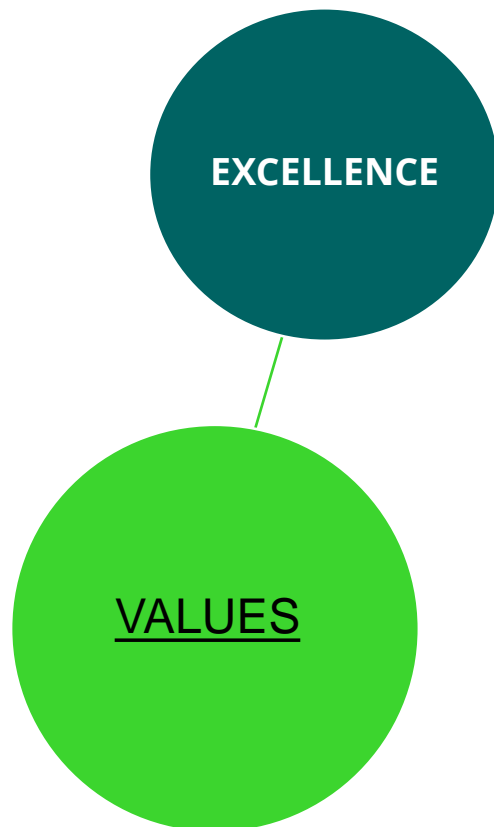


ONE BRIDGE - Teamwork



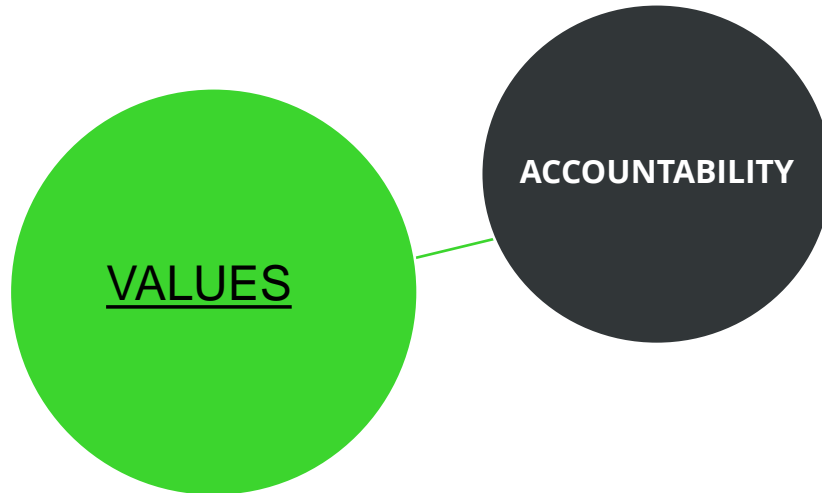
- We emphasize teamwork in everything we do.
- We thrive on collaboration, hard work and open and honest communication.

ONE BRIDGE - Excellence



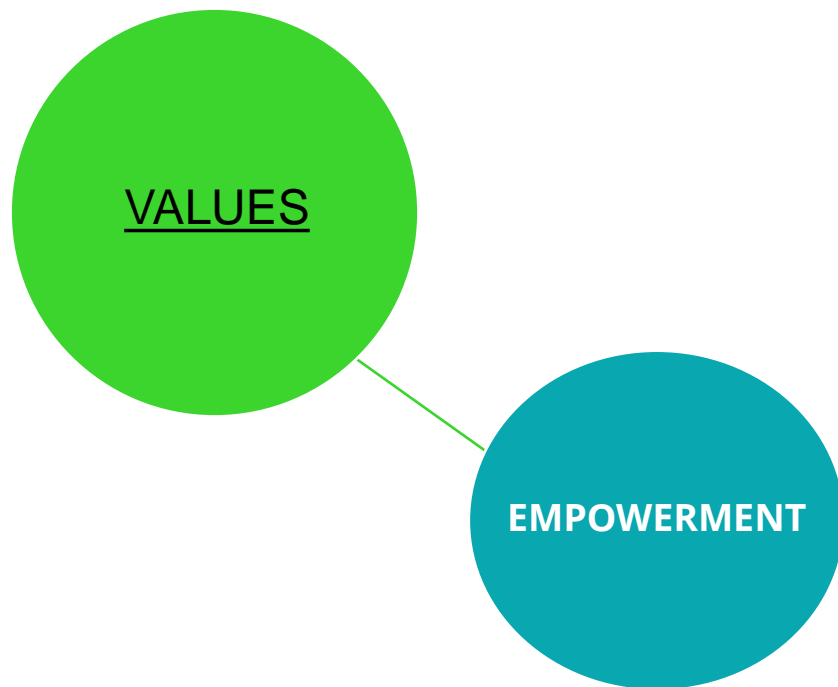
- We strive to be the best performing firm in our industry.
- We take pride in our performance and celebrate our achievements.
- We do what is right – for the right reasons.

ONE BRIDGE - Accountability



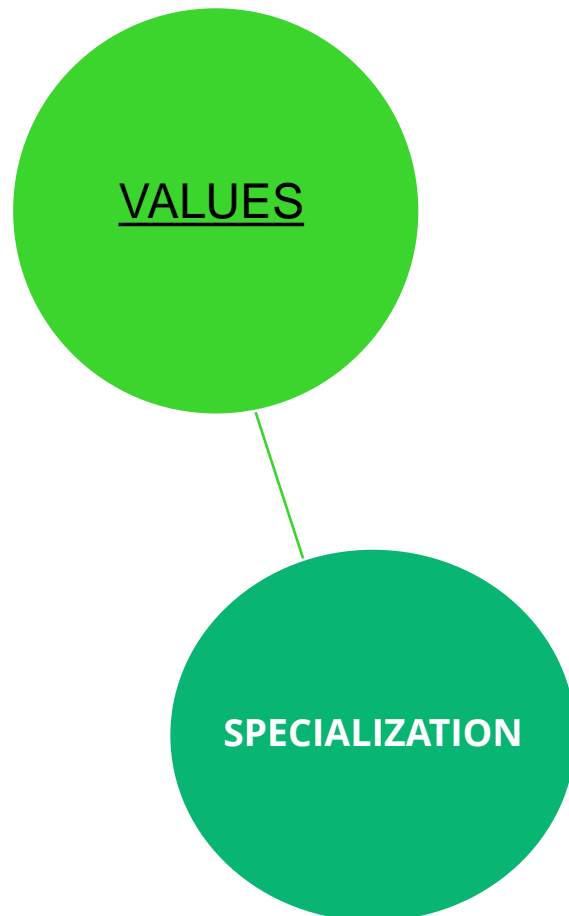
- We stand behind our word and strive for continuous improvement in all that we do.
- We face facts and realities, and we embrace challenges.

ONE BRIDGE - Empowerment



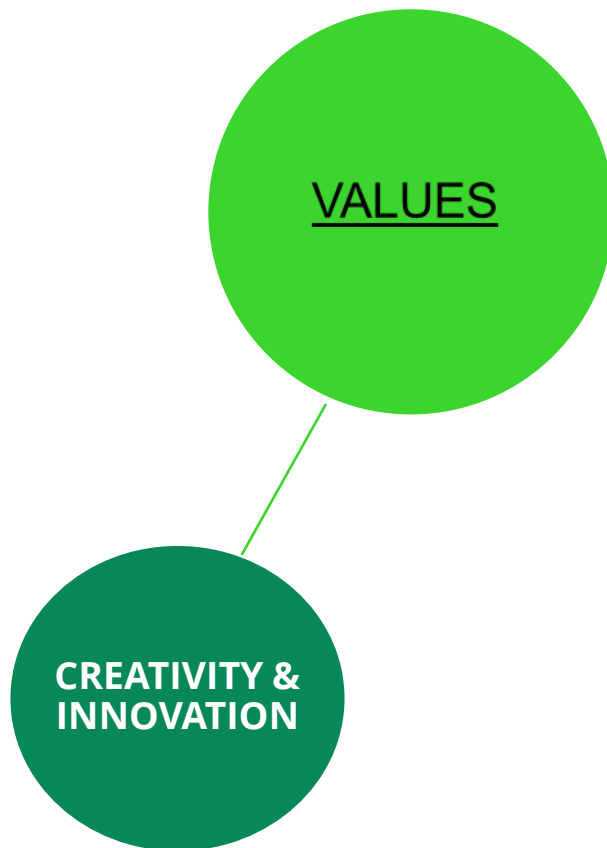
- We empower our people to reach their full potential.
- We cultivate a diverse and inclusive culture of disciplined analysis and action.
- We believe that diversity is the only path to superior performance.

ONE BRIDGE - Specialization



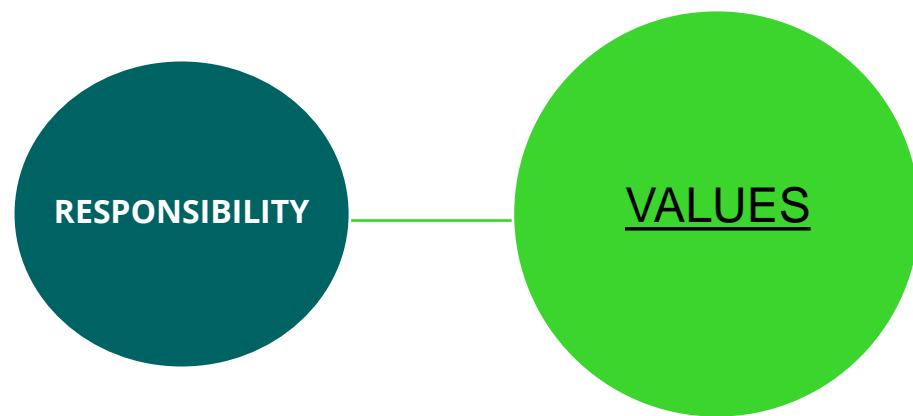
- We develop specialized investment and operating teams which have deep sectoral knowledge of the areas in which we invest.
- We use data, carefully analyzed and fully vetted, to complement decades of experience, in guiding our investment decisions.

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.