



Professional Skills & Leadership Training

CONTENT SAMPLES

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Early Talent Readiness

The Early Talent Readiness suite equips interns and early-career professionals with the communication skills, workplace awareness, confidence, and professional maturity required to excel from Day One. Through modular programs highlighted below, participants learn how to adapt quickly to corporate expectations, communicate with clarity, build strong professional relationships, and navigate the challenges of high-performance environments. These offerings provide organizations with scalable, customizable solutions that accelerate early-career development, reduce ramp-up time, and strengthen the long-term talent pipeline.

Classroom to Corporate: Helping New Talent Thrive

- **Summary:** A transition program for emerging professionals entering their first corporate role, focused on adapting to culture change, communication norms, performance mindsets, branding, networking, and corporate performance expectations. Content is delivered in modular 90-minute components that can be combined and customized based on organizational needs.
- **Audience:** Interns and early-career hires
- **Format:** Modular 90-minute components, delivered virtually or in-person; customizable from 90 minutes to 2 days
- **Question:** “How smoothly are your newest hires adjusting to corporate expectations and workload rhythms, and would a structured professional skills launch help your analysts ramp up faster and avoid early missteps?”

A2A Professional Development: Personal Brand & Data-Informed Storytelling

- **Summary:** A tailored workshop for Analysts preparing to transition into the Associate role. This program strengthens personal branding, communication clarity, and executive presence while teaching participants how to synthesize complex data into persuasive, audience-ready narratives. Through practical frameworks and examples, emerging Associates learn to communicate with greater confidence, structure, and impact in high-stakes internal and client environments.
- **Audience:** Early-career professionals preparing for Associate-level responsibility
- **Format:** Modular 90-minute components; delivered virtually or in-person; customizable as a ½-day to full-day workshop
- **Question:** “As your Analysts prepare for Associate-level responsibilities, would strengthening their personal brand and data-driven storytelling improve their confidence, clarity, and client-facing impact?”

A2A Supervision and Leadership

- **Summary:** A practical and highly focused program designed to prepare Analysts transitioning into Associate roles for the supervisory, leadership, and communication demands of their next career stage. Participants learn how to delegate effectively, provide structured feedback, manage up and across deal teams, lead workstreams with clarity, and communicate expectations with greater confidence and professionalism. The program addresses the mindset shift required when moving from “doing the work” to “leading the work,” equipping new Associates with the tools and behaviors needed to elevate team performance and operate with greater ownership and maturity.
- **Audience:** Early-career professionals preparing for Associate-level responsibility

- **Format:** Modular 90-minute components; virtual or in-person; customizable from ½ day to 1 day
- **Question:** “As your Analysts prepare for Associate-level leadership responsibilities, would a structured supervision and leadership program help them delegate more effectively, communicate with confidence, and manage team dynamics with greater maturity?”

Sales Communication & Relationship Training

- **Summary:** A practical, high-impact program designed to strengthen the communication, relationship-building, and client engagement capabilities of professionals in sales, coverage, or client-facing roles. Participants learn how to communicate with clarity and confidence, tailor messages to diverse stakeholder needs, deepen trust, ask high-value questions, frame recommendations credibly, and navigate challenging conversations. The program emphasizes repeatable frameworks that elevate both individual presence and team-wide client communication standards.
- **Audience:** Client-facing professionals in sales, relationship management, product, and advisory roles
- **Format:** Modular 90-minute components; virtual or in-person; customizable from ½ day to 2 days
- **Question:** “Would strengthening your team’s communication and relationship-building skills help improve client engagement, credibility, and overall sales effectiveness?”

Presenting to Investors – A Framework for Emerging Talent

- **Summary:** A practical program that teaches analysts and associates how to prepare and deliver clear, concise, and investor-ready presentations. Participants learn how to translate analysis into compelling messages, anticipate investor questions, and communicate with confidence in fast-moving financial environments.
- **Audience:** Early-career professionals at the analyst and associate level
- **Format:** Modular 90-minute components delivered virtually or in-person; customizable from 90 minutes to ½ day
- **Question:** “For your early-career talent who present to investors or internal committees, would a structured approach to message clarity and delivery help improve confidence and performance?”

Foundations of Leadership for the Associate Role

- **Summary:** A foundational leadership program designed to equip new Associates with the mindset, behaviors, and communication habits required to lead workstreams, guide junior talent, and operate with greater ownership. This module focuses on the core leadership expectations of the Associate role, including managing team dynamics, setting clear expectations, elevating communication clarity, demonstrating executive composure, and shifting from task execution to strategic contribution. Participants learn practical tools that strengthen influence, enhance credibility, and accelerate their transition into capable, confident Associate-level leaders.
- **Audience:** Early-career professionals stepping into Associate-level leadership responsibilities, either via A2A or MBA Hires.
- **Format:** Modular 90-minute components; virtual or in-person; customizable from ½ day to 1 day

- **Question:** “As your Analysts transition into the Associate role, would a structured leadership foundation help them elevate their communication, guide junior talent more effectively, and lead with stronger confidence and clarity?”

Navigating Change

- **Summary:** Foundational training for junior employees adapting to organizational changes outside their control, focusing on mindset and resilience. Thriving in change requires more than technical ability, it demands self-awareness, adaptability, and a proactive mindset. This half-day program is designed for junior professionals and analysts who are building their careers within dynamic organizations. Participants will learn to understand change in context, manage their reactions with professionalism, and position themselves as valuable contributors during periods of transition.
- **Audience:** Early-career professionals at the analyst and associate level
- **Format:** Virtual or in-person. Three 90-minute modules (½ day)
- **Question:** “Do your early talent employees struggle with uncertainty or ambiguity during times of change?”

High-Potential Student Leadership and Career Readiness Program

- **Summary:** Preparatory program for high-potential college students in funded scholarship or leadership cohorts, building readiness for internships and early career roles through mindset, communication skills, and professional expectations.
- **Audience:** High-potential college students
- **Format:** Modular 90-minute components delivered virtually or on-campus; customizable from 90 minutes to 1/2 day.
- **Question (University-aligned):** “Would your scholarship or high-potential student cohorts benefit from a corporate-readiness program to strengthen internship outcomes?”

Business Writing for High-Impact Professionals

- **Summary:** Practical training focused on writing clear, concise, and professional communications that meet demanding corporate standards.
- **Audience:** Early-career professionals at the analyst and associate level
- **Format:** Modular 90-minute components delivered virtually or in-person; customizable from 90 minutes to 1/2 day.
- **Question:** “Do you see inconsistent writing quality or slow turnaround times that stronger writing structure and protocols could solve?”

Navigating Ambiguity

- **Summary:** A practical workshop designed to help professionals operate effectively in environments where priorities are unclear, information is incomplete, and expectations are constantly shifting. Participants learn how to think clearly under uncertainty, prioritize competing demands, communicate proactively, manage up, and make sound decisions without perfect information. The program equips talent with frameworks and behaviors that reduce hesitation, improve judgment, and build confidence in fast-moving, high-expectation organizations.
- **Audience:** Emerging professionals, Associates, and mid-level leaders operating in complex or fast-paced environments
- **Format:** Modular 90-minute components; virtual or in-person; customizable from ½ day to full day

- **Question:** “When priorities are unclear or demands conflict, do your teams hesitate or struggle to decide what matters most, and would a structured approach to navigating ambiguity improve confidence and execution?”

Presentation Storyboarding

- **Summary:** A hands-on workshop that teaches professionals how to structure complex ideas into clear, compelling presentation narratives. Participants learn how to define the core message, sequence insights logically, align data to storyline, and anticipate audience questions before building slides. The program emphasizes clarity of thought before slide production, enabling teams to communicate recommendations more effectively and reduce rework in high-stakes internal and client-facing presentations.
- **Audience:** Analysts, Associates, Managers, and client-facing professionals preparing presentations
- **Format:** Modular 90-minute components; virtual or in-person; customizable from ½ day to 1 day
- **Question:** “Do your teams spend significant time revising slides because the story is unclear, and would a structured storyboarding approach improve clarity and efficiency before slides are built?”

Continuous Learning & Support Programs

Fractional Mentoring Program

- **Summary:** A structured mentoring solution that provides organizations with ongoing, high-touch professional and leadership guidance from a seasoned advisor without the cost or commitment of full-time internal coaching resources. This program supports early-career talent across the organization. Participants receive tailored mentoring, practical tools, and confidential guidance that accelerates growth, strengthens performance, and enhances readiness for new responsibilities.
- **Audience:** Interns, Early-career professionals at the analyst and associate level
- **Format:** Recurring virtual mentoring sessions with optional in-person intensives.
- **Question:** “Do you have early career programs, high-potential employees or rising leaders who would benefit from consistent mentoring and professional guidance, but lack an internal structure to support them?”

Climb to the Top – Professional Skills Online Course

- **Summary:** A comprehensive on-demand professional skills course designed to strengthen communication, confidence, workplace readiness, and leadership habits for emerging and early-career professionals. Through 60+ structured modules, participants learn practical tools for executive-ready communication, time management, personal branding, mindset development, navigating corporate environments, and building early career momentum. Link to [Climb To The Top Preview Course](#) with 4 sample episodes.
- **Audience:** College students and early-career professionals
- **Format:** On-Demand, fully online and self-paced
- **Question:** “Would an on-demand professional skills course help your students, incoming interns or early-career talent build workplace readiness, confidence, and communication skills in a scalable way?”

Modular VP Leadership Development Sessions

The VP Leadership Accelerator is a modular development experience designed to strengthen Vice Presidents' leadership capability, communication skills, and cross-team influence. Client can select from a curated set of high-impact modules to create a customized learning pathway that aligns with the firm's strategic goals for VP advancement. Each module is approximately seventy-five minutes and blends practical tools, financial services scenarios, peer learning, and guided reflection.

Leading Others: From Peer to Leader

- **Summary:** A transition program helping VPs move from individual execution to effective leadership through delegation, expectation setting, and trust building.
- **Audience:** Vice Presidents beginning people leadership
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** "Are your VPs ready to shift from doers to leaders with clear expectations and follow-through?"

Becoming a Trusted Advisor

- **Summary:** A communication-focused program that strengthens client influence, clarity of message, and strategic partnership skills.
- **Audience:** VPs with expanding client responsibilities
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** "Do your VPs need support moving beyond technical execution to strategic advisory roles?"

Executive Presence and Personal Branding

- **Summary:** A leadership presence program designed to elevate communication tone, confidence, and influence in internal and external settings.
- **Audience:** VPs seeking greater visibility and leadership impact
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** "Are your VPs communicating with the presence expected of future senior leaders?"

Managing Change and Organizational Dynamics

- **Summary:** A strategic program that equips VPs to lead teams through ambiguity, shifting priorities, and organizational transitions.
- **Audience:** VPs driving or supporting change initiatives
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** "Do your VPs have tools to lead effectively through ongoing change?"

AI and the Future of Junior Talent

- **Summary:** A forward-looking module focused on how AI is reshaping workflows and how VPs must adapt oversight, coaching, and workflow design.
- **Audience:** VPs overseeing junior teams or AI-impacted workflows
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** "Are your VPs prepared for a future where AI reshapes how junior work gets done?"

Senior Presentation Excellence

- **Summary:** A communication program focused on presenting complex information to senior leaders clearly, concisely, and confidently.
- **Audience:** VPs presenting to Directors, MDs, or clients
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Do your VPs need to strengthen their ability to influence senior decision-makers?”

Cross-Vertical Networking and Internal Collaboration

- **Summary:** A collaboration program that helps VPs build relationships across functions and product groups to expand influence and improve execution.
- **Audience:** VPs located within coverage or product silos
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Are your VPs building the internal networks needed for enterprise leadership?”

Emotional Intelligence and Body Language

- **Summary:** A behavioral program enhancing self-awareness, interpersonal sensitivity, and the ability to interpret nonverbal cues in professional interactions.
- **Audience:** VPs engaged in client work, team management, or conflict resolution;
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Could your VPs benefit from improved emotional intelligence and interpersonal agility?”

Strategic Influence and Decision-Making

- **Summary:** A leadership program that teaches VPs to shape decisions, frame recommendations, and influence without formal authority.
- **Audience:** VPs involved in strategic initiatives or team leadership
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Are your VPs equipped to influence senior stakeholders effectively?”

Resilience and Burnout Management

- **Summary:** A performance program that provides tools for managing workload demands, recovering from stress, and sustaining high performance.
- **Audience:** VPs under prolonged pressure
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Do your VPs have strategies to maintain performance during heavy cycles?”

Overcoming Fear of Failure and Imposter Syndrome

- **Summary:** A confidence-building program that addresses internal blockers and helps VPs prepare mentally for senior-level responsibility.
- **Audience:** VPs navigating self-doubt or expanding responsibilities
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Are internal confidence barriers limiting your VPs’ readiness for senior roles?”

Spotting and Seizing Emerging Opportunities

- **Summary:** A proactive module that strengthens strategic thinking and helps VPs identify opportunities created by industry shifts and organizational change.
- **Audience:** VPs seeking to expand their strategic lens
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Are your VPs equipped to identify and act on emerging opportunities?”

Handling Workplace Conflict and Ethical Challenges

- **Summary:** A conflict management program covering junior performance issues, difficult conversations, and upward ethical concerns.
- **Audience:** VPs managing teams or interacting with senior leaders
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Do your VPs know how to address conflict and ethical concerns before escalating them?”

Negotiation Skills for Financial Professionals

- **Summary:** Practical workshop teaching negotiation frameworks, client communication, and strategic decision-making tailored to financial settings.
- **Audience:** VPs/Finance professionals.
- **Format:** Modular 75-minute component delivered virtually or in-person
- **Question:** “Do you notice uneven negotiation skills or missed opportunities that stronger frameworks could improve?”

Continuous Learning & Support Programs

Executive Coaching

- **Summary:** A high-impact, individualized coaching program designed to strengthen the communication, leadership presence, decision-making, and strategic effectiveness of senior professionals. This coaching supports leaders navigating increased responsibility, organizational complexity, high-stakes communication, or role transitions, helping them perform with greater clarity, confidence, and influence.
- **Audience:** Mid- to senior-level leaders and executives
- **Format:** Recurring virtual coaching sessions with optional in-person intensives
- **Question:** “Do you have senior professionals who would benefit from individualized coaching to strengthen their communication, leadership presence, and strategic effectiveness?”

Senior (MD/D) Leadership Development

The Senior Leadership Development suite strengthens the communication, influence, decision-making, and change-leadership capabilities of senior-level leaders. Through programs such as Leading Change, Senior Leader Presentation Excellence, and Leadership Development Concepts, leaders learn how to communicate with clarity, drive complex initiatives, elevate team performance, and represent the organization with confident executive presence. To ensure relevance, buy-in, and alignment across the leadership ranks, these programs are ideally preceded by a structured Leadership Listening Tour, which gathers insights directly from senior stakeholders and tailors the curriculum to the organization's unique culture, priorities, and performance expectations. Together, these offerings create a cohesive leadership development pathway that strengthens organizational readiness and elevates leadership impact at scale.

Leading Change

- **Summary:** A seminar enabling mid-to senior-level leaders to drive, communicate, and sustain organizational change with clarity and influence.
- **Audience:** Mid-and senior-level leaders
- **Format:** Small-group virtual or in-person workshops
- **Question:** “As major initiatives roll out, do your leaders feel fully equipped to guide teams through change effectively?”

Senior Leader Presentation Excellence

- **Summary:** A high-impact program for mid-senior leaders who must communicate with clarity, authority, and executive presence. The seminar provides a structured framework for organizing complex content, delivering confident narratives, and presenting to internal and external stakeholders with precision.
- **Audience:** Mid-and senior-level leaders
- **Format:** Small-group virtual or in-person workshops
- **Question:** “As your leaders prepare for board updates, client meetings, or senior-level presentations, would a structured communication framework help elevate clarity, presence, and impact?”

Leadership Development Concepts

- **Summary:** Modular leadership training covering self-awareness, influence, strategic thinking, communication, and decision-making.
- **Audience:** Mid-and senior-level leaders
- **Format:** Small-group virtual or in-person workshops
- **Question:** “Do you have high-potential employees who could accelerate with structured leadership development?”

Continuous Learning & Support Programs

Leadership Listening Tour

- **Summary:** A structured discovery process that engages senior stakeholders through focused one-on-one conversations to uncover organizational priorities, communication norms, leadership challenges, cultural dynamics, and performance expectations. The Listening Tour provides the critical insight needed to customize leadership development programs, strengthen leader buy-in, and ensure that training aligns with the real-world needs of the business. This



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approach accelerates relevance, adoption, and long-term impact across the leadership population.

- **Audience:** Senior leaders, Managing Directors, Directors, and key stakeholders
- **Format:** Confidential one-on-one interviews (30–45 minutes each); virtual or in-person; delivered as a 2–4 week engagement
- **Question:** “Before launching a leadership development program, would structured conversations with your senior leaders help uncover priorities, build alignment, and tailor training to your organization’s unique needs?”

Mission-to-Market: Bridging Senior Military Leaders into Corporate Roles

- **Summary:** A specialized program supporting senior military leaders transitioning into specific and needed high-value corporate finance and client-facing roles.
- **Audience:** Senior military leaders
- **Format:** Virtual, with tailored in-person seminars.
- **Question:** “Are you looking to fill specific high-value finance or client-facing roles with transitioning military leaders who bring proven leadership?”