

SHORE
UNIVERSITY



2024 Professional
Development
Course Catalog



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Our people are our greatest asset. Shore University is one of the most visible, important, and rewarding investments we make in our people.

JUSTIN ISHBIA
Managing Partner
Shore Capital

What Is Shore University?

In 2015, Shore held its first Executive Leadership Academy for seven CEOs. Since that first ELA, the networking and development offering has expanded to over 50 in-person and virtual collaboration events, harnessing the power of 40+ companies and hundreds of executives, representing over 30,000 team members. This is collectively known as *“Shore University”*.



Together, we can grow bigger, stronger, and faster.

Welcome from Shore Partners

Dear Shore Capital Partner Companies,

Thank you for your partnership in making 2023 a terrific year of professional growth and development. Shore remains committed to offering outsized resources to great microcap companies, but it is your teams' contribution and collaboration that creates the network effect of 40+ companies working together.

This is a competitive advantage on multiple levels. Our investment in **Shore University** is a differentiator that helps attract, retain, and engage talented team members.

We are excited to share our most extensive **Shore University** offering ever in 2024. In addition to flagship programs offered at no charge to your company, we are expanding talent development opportunities and shared Learning & Development resources.

Shore University includes in-person, virtual, and self-directed programs to support personal development, attract talent, and reduce turnover.

A few highlights:

- Executive Leadership Academy (ELA)
- Portfolio Leadership Academies
- The CXO Fellows Program led by Dr. Michael Burcham
- The Peak Performer Program with Harvard Business School Professor Boris Groysberg
- Center of Excellence Cohorts for functional leaders
- Courses in Management Foundations and Team Member Essentials
- Podcasts, webinars, white papers, additional media content
- A Learning Management System (LMS) to support and facilitate Shore University

Details and contact information are enclosed in the **Shore University** course catalog. Thank you again for your support. We recognize the commitment you and your teams make and look forward to 2024 raising the bar for leadership development and networking.

Sincerely,
Shore Capital Partners

FOR ADDITIONAL INFORMATION ON SHORE UNIVERSITY
www.shorecp.university

PARTNERS

JUSTIN ISHBIA
Managing Partner

JUSTIN BENTLEY
Capital Markets

RICHARD BOOS
Food and Beverage

MIKE COOPER
Healthcare

CRAIG CULBERT
Real Estate

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Business Services

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Industrials

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Executive Leadership Academy

Shore's Executive Leadership Academy (ELA) is our premier event dedicated to microcap operators. Each summer hundreds of executives and Shore team members meet to network, learn, and share knowledge. ELA is no charge to your company, other than travel expenses.

This year's ELA will be held July 23-25 in Chicago.



We are obsessive about process, growth, and results and do everything we can to make our owners and executives successful.

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The concentration of knowledge and experience in one spot is so valuable and allows for rapid feedback on challenges from people who have in to the top of the mountain you're trying to climb.

Executive Leadership Academy



During this intensive three-day conference, the leadership teams of our portfolio companies have the opportunity to:



Scan here for
**EXECUTIVE
LEADERSHIP
ACADEMY**
2023

- **Hear from World Leaders in Management Strategy & Development:** This includes both interactive and group presentations that blend cutting-edge strategy with practical applications, delivered exclusively to Shore portfolio executives. We ensure that the topics covered address the key issues of growth companies.
- **Strengthen Relationships & Share Experiences:** Each participant has a personalized agenda designed to fit their own professional journey. Participants are able to meet leaders with a range of roles, responsibilities, or business maturity to share best practices and lessons learned.
- **Collaborate With Peers and Other Companies:** Breakout sessions are organized for peer-to-peer and company-to-company collaboration. This fosters in-depth conversations about operating in today's business environment.

CONTACT
JULIA DILDAY
Head of Events
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Portfolio Leadership Academy

What Is Leadership Academy?

Leadership Academy is where learning meets leadership and business application. It's where years of knowledge and experience are passed on to help others become their best self. It's where we empower individuals to go beyond the ordinary and to achieve the extraordinary.

Leadership Academy is a key feature of our commitment to professional development for our portfolio companies. Our goal is to foster advanced personal and professional development, providing each participant with the skills to sustain and advance the growth of their business.

Leadership is a learned set of skills in influencing and directing others, communicating effectively, understanding the strengths and weaknesses of those around you, recognizing their potential, and coaching them to become their best self. Successful leaders invest in themselves so that they have the necessary skills to build high-performance teams.

Through immersive, engaging and interactive content, this program delivers value at all levels of management. For early-stage leaders, the skillsets, tools and lessons learned are invaluable. More experienced leaders also appreciate the established curriculum and find themselves reframing and thinking differently about their own leadership approach.

Participants are able to expand their professional network across the Shore family of companies, broaden their business insight, and realize new opportunities in leadership through the speakers they hear from and the high-value interactions they make with their peers.

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This course is giving me the tools I need to be a successful leader for my team, to build my practice and to really understand how business value is created. It's even made me a better husband and father.

The Portfolio Leadership Academy is a 6-Month “Mini MBA” to Advance Leadership Skills

Many founders and their company leaders who have partnered with Shore have specific expertise in their chosen field, but may not have the key business and leadership tools they need to manage a rapidly growing business. This is why we created the Leadership Academy.

The Leadership Academy is offered in our Nashville office or onsite at a partner company. Tuition is per individual or the program can be bought out by a single Shore partner company.



CONTACT

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VP of Talent Development
awilliams@shorecp.com



LEADERSHIP ACADEMY

Scan here to register for an upcoming LEADERSHIP ACADEMY



Intended Audience: N-2's, Acquired Partners, Associate Doctors, Site Administrators and Practice Managers, and other outstanding individual contributors.

Delivery Method: 6-month program that includes an in-person kickoff, eight virtual sessions, and an in-person finale.

CURRICULUM

Leading vs. Managing:
Understanding the Difference

The Non-Negotiables:
Mastering Key Leadership Skills

Building Trust:
Establishing the Roots of Leadership

Healthy Tension:
Building & Sustaining High-Performance Relationships

Emotional Intelligence:
IQ vs. EQ and Why it Matters

The Johari Window:
Identifying Your Blind Spots as a Leader

The Art and Science of Meaningful Communication:
Creating Signal Instead of Noise

Maximizing Your Impact:
Intention. Focus. Action.

How Will You Get There?
Developing Your Personal Leadership Roadmap

What's Your Problem?
Identifying Real Problems and How to Solve Them

Managing Conflict:
Creating Space for Healthy Disagreement

Leading Through Others:
Transitioning from Captain to Coach

From Pain to Possibility:
Leading and Mastering Change

Meetings Matter:
How to Lead Great Meetings

Engaging the Team:
Because You Alone Aren't Scalable

The Power of Feedback:
Cultivating a Strong Feedback Culture

Strategic Mentoring:
Relationships that Build Your Leadership and the Company

Maximizing Performance:
Executing the Business Model to Drive Value

Points of Difference:
Finding & Feeding Your Purple Cow

MANAGEMENT FOUNDATIONS

Course Description: A certification in the core practices of good management

Intended Audience: Portfolio company managers (i.e., Supervisors, Practice Administrators)

Delivery Method: Self-directed, virtual course in the Learning Management System

TEAM MEMBER ESSENTIALS

Course Description: A certification in the fundamentals of being a great team member

Intended Audience: Frontline portfolio company team members

Delivery Method: Self-directed, virtual course in the Learning Management System

CURRICULUM

Becoming a Great Manger:
Foundational Principles of Management

The 5 Dysfunctions of a Team:
How to Build a Great Team

Unlocking the Power of Your Team:
Understanding, Motivating, and Engaging the Team

The Art and Science of Communication:
Understanding Communication Styles

Giving and Receiving Feedback:
Making Feedback Core to Your Management

Managing Conflict:
Navigating Difficult Conversations

Time Management:
Protecting, Prioritizing, and Maximizing Your Time

CURRICULUM

The 6 C's of Team Success

Communication:
Becoming a Great Communicator

Concentration:
Focusing and Prioritizing Your Work

Coordination:
Organizing and Executing Your Work

Collaboration:
Developing the Mindsets of a Great Collaborator

Conflict Management:
Developing Strategies and Skills for Dealing with Conflict

Celebration:
Understanding the Value and Tools for Peer Recognition

TO REQUEST ACCESS FOR YOU OR YOUR TEAM, PLEASE EMAIL

ANDERSON WILLIAMS
VP of Talent Development
awilliams@shorecp.com

KEY TOPICS IN LEADERSHIP

Course Description: Curated collection of lessons for leaders and managers

Intended Audience: Any Shore or portfolio company leader or manager

Delivery Method: Self-serve, virtual lessons available in the Learning Management System

CURRICULUM

Understanding Teamwork:
Developing the Ultimate Competitive Advantage

Meaningful Metrics:
KPIs and Dashboards that Matter

Stakeholder Analysis:
Understanding Them and Why they Matter

Time Management:
Maximizing Your Most Precious Resource

Strategic Communication:
Conducting “Everyday Negotiations”

Transitioning to Leadership:
Working “On” vs. Working “In” the Business

Embracing the Suck:
Building Your Resilience in the Face of Challenges

Rewards & Recognition:
How to Create a Great Place to Work

Imposter Syndrome:
How to Deal with Self-Doubt

Delegation:
The Core Principles of Why, What, How, Who



CXO FELLOWS

Within the CXO Fellows Program, each participant builds connectivity to Shore and their peers during eight in-person meetings designed to occur over a two year period. A Shore CXO is someone who has taken on a support role to the CEO of a portfolio company with the plan to professionally grow into a C-Suite role for themselves with a future Shore platform.

The program relies on growth together as a group. Each CXO will have peers ahead of you and behind you in their professional development - but each cohort will grow and learn from one another, creating relationships that will last throughout their career.

After completing this two year curriculum (and as the CXO grows), they join other cohort groups (e.g. finance, operations). CXOs then become alumni of the CXO Fellows Program - but reconvene each year at Shore's Executive Leadership Academy (ELA) with optionality to attend other CXO leadership development events.

CONTACT

MICHAEL BURCHAM

Chief of Strategy and Talent Development
mburcham@shorecp.com



“

I really enjoyed getting together with leaders from the other portfolio companies and had several valuable takeaways that came at the perfect time as we scale. The speaker sessions were fantastic, and I learned so much during them. I also enjoyed the breakout sessions and dinner which gave me the opportunity to get to know my peers.

MARK LARSEN
COO, Point C
(CXO Graduate)

Quarterly sessions over two years will focus on eight core themes that foster successful leadership in microcap businesses at Shore Capital Partners.

- Board Management
- Team and Processes
- The Art of Communication
- Corporate Strategy
- Engaging Stakeholders
- Organizational Alignment
- Operational Excellence
- Successful Working Norms

Each session will include the following:

- Optional morning session in a key function or skill
- Lunch with a Shore partner
- Competency theme working session
- Discussion time
- Relationship building



CXO Summit



Theme:
Team and Processes

SESSION TOPICS:

Leading Multi-Generational Teams

Anderson Williams
VP of Talent Development
Shore Capital Partners

Lunch with the Partner

Justin Ishbia
Managing Partner
Shore Capital Partners

Human Capital Management at Scale

Emily Leonard
Chief People Officer
Southern Orthodontic Partners



Theme:
Art of Communication

SESSION TOPICS:

Earning Trust Through Communication

Michael Burcham
Chief of Strategy and Talent Development
Shore Capital Partners

Lunch with the Partner

John Hennegan
Healthcare
Shore Capital Partners

Scaling CEO Communication

Mike Aubrey
CEO
Mission Veterinary Partners



Q3
2024

Theme:
Corporate Strategy

SESSION TOPICS:

Strategy Drives Value Creation
Michael Burcham
Chief of Strategy and Talent Development
Shore Capital Partners

Lunch with the Partner
Brad Morehead
Business Services
Shore Capital Partners

Making a Strategic Pivot
Jack Fitzgibbons
CEO
Assembly Health

Q4
2024

Theme:
Key Stakeholders

SESSION TOPICS:

Best Practices in Integration: Lessons Learned
Michael Burcham
Chief of Strategy and Talent Development
Shore Capital Partners

Lunch with the Partner
Mike Cooper
Healthcare
Shore Capital Partners

Engaging Stakeholders
Keith Caldwell
CEO
H2O Care Partners

Peak Performer Program

The Peak Performer Program (PPP) is an exclusive offering for high-potential team members to network, learn from one another, and give valuable insights into world class leadership - leading yourself, leading your team, and leading organizations.

Led by Professor Boris Groysberg of Harvard Business School, the curriculum is built around HBS hall-of-fame case studies shared both virtually and in person. The PPP is an exclusive Leadership Development offering. Each CEO may nominate up to three team members to participate in the program.

Breakout groups, modeled after the Young President's Organization (YPO) and HBS approach, create a greater level of networking and collaboration with other top performers, adding depth and continuity to the experience.



2024 CURRICULUM:

Workshop 1: Rob Parsons, Morgan Stanley

Employee Performance vs. Company Values: A Manager's Dilemma (2hrs)

Workshop 2: Building a Great Team

In-person at Shore's Chicago office This is an interactive session to illustrate how great teams most effectively work together to reach a common goal. (4hrs)

Workshop 3: Danaher Corporation

Danaher has been one of the best-performing industrial conglomerates in the U.S. This case examines the corporate strategy of this diversified, global corporation: portfolio strategy and the Danaher Business System. (2hrs)

Workshop 4: Recruitment of a Star

Details power dynamics that unfold in the firm when one of its best and brightest threatens to leave. It focuses on the dynamics of attracting, hiring, compensating, negotiating, and leveraging a star performer in a professional service firm. (2hrs)

Workshop 5: Google Project Oxygen

Do managers matter? The topic generated a multi-year research project that ultimately led to a comprehensive program, built around eight key management attributes, designed to help Google employees become better managers. (2hrs)

Workshop 6: Finale: Chasing Stars

Companies need talent to drive their strategies forward-to innovate, to adapt, and to execute flawlessly. But whether you are seeking a key executive, several portfolio managers or a dozen engineers, how can you find the talent you need? (2hrs)

CONTACT

MICHAEL BURCHAM

Chief of Strategy and Talent Development
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Centers of Excellence Cohorts

Customized by functional area, the Centers of Excellence (COE) cohorts are a powerful professional development experience designed to help executives go faster with less risk.

Participants collaborate through virtual and in-person meetings to network and share best practices. These are meaningful interactions of individuals who share similar roles across the entire Shore Capital portfolio.

This shared experience helps to de-risk decision making across our organizations, build collaborative working relationships, and benchmark new learnings so that the collective experience continues to improve. For individuals new to a key leadership role, it also provides a powerful support network.

Cohorts typically meet quarterly (virtually 3x per year and in-person 1x per year). Leaders are encouraged to develop regular touchpoints with other cohort members outside of the scheduled four meetings.



Shared Learning Calls

3x per year for approximately 90 minutes, a virtual call is held on pre-selected topics that are top of mind for cohort participants. A presenter or panel will often lead the content delivery, and post-event materials are circulated to all members through the Learning Management System (LMS).



In-Person Event

1x per year, all cohort participants get together for an in-person event focused on more in-depth shared learnings, networking, and strengthening relationships across the portfolio.



Learning Management System

The Shore University Learning Management System (LMS) is software to administer, document, track, and deliver Shore University content. The LMS is a secure, single location for participants to access slides, videos, articles, and other resources that support and enhance their learning. Key features of the LMS include a customized learner dashboard, discussion boards, and a curated leadership resource library.



The Shore marketing cohort has been a major boon to our efforts, and my team continues to be more than happy to share our learnings across the portfolio!



CONTACT

JULIANN LARIMER

Head of the Centers of Excellence
jlarimer@shorecp.com

Calendar of In-Person Cohort Events

Each of the following cohort events are in-person and planned for 24 to 36 hours, inclusive of travel and meetings. We ask that your team honor these dates like a Board Meeting and prioritize participation. These events are no charge to your company, other than travel expenses.

In addition to these in-person events cohorts offer optional virtual events throughout the year that typically run less than two hours in length.

BY QUARTER:

		CORP DEV	DATA	FINANCE	HR	IT	MKTG	OPS	PAYOR	RCM	SALES	ELA	PPP	CXO	LID
Q1	Jan 24														
	March 26	X													
	March 27													X	
Q2	April 2							X							
	April 16												X		
	May 29													X	
	May 30		X			X									
	May 31		X			X									
	June 5			X											
Q3	July 16														
	July 23											X			
	Sept 10													X	
	Sept 11														X
	Sept 12				X										
	Sept 19						X				X				
	Sept 24									X					
	Sept 25								X						
Q4	Oct 17														X
	Nov 5														
	Nov 20													X	
	Dec 2														

DEFINITIONS

- HR Human Resources
- IT Information Technology
- OPS Operations
- RCM Revenue Cycle Management
- ELA Executive Leadership Academy
- PPP Peak Performer Program
- CXO CXO Fellows
- LID Lead Independent Directors

COE Cohort Leaders & Contact Information

In addition to leading connectivity and collaboration between peers, COE cohorts offer an onboarding experience for new functional leaders. These onboarding sessions can range from one hour virtually to a few weeks, depending on the level of desired support. Through onboarding, leaders are given:

- An overview of Shore Capital and resources available to them
- Tools that help new leaders engage immediately for results
- Expectations during the investment period by Shore
- Common traits of successful leaders
- Introductions to their cohort peers

“

I attended my first COE cohort session within a few weeks of starting my job. The reception and support I received from my peers and the Shore Capital team confirmed for me I had made a great choice in joining the organization.

The following COE Leaders are here to support your team members:

COMMERCIAL EXCELLENCE (SALES) COHORT

Leader: Juliann Larimer, *Head of the Centers of Excellence*
jlarimer@shorecp.com

MARKETING COHORT

Leader: Adam Werder, *Chief Marketing Officer*
awerder@shorecp.com

DATA & ANALYTICS COHORT

Leader: Ross Koenig, *Chief Data Officer*
rkoenig@shorecp.com

PAYOR STRATEGIES COHORT

Leader: Christy Vitulli, *Head of Payor Strategies*
cvitulli@shorecp.com

REVENUE CYCLE COHORT

Leader: Sarah Hirsch, *Chief Revenue Officer*
shirsch@shorecp.com

PROCESS IMPROVEMENT COHORT (OPERATIONS)

Leader: Kevin Williams, *Chief Improvement Officer*
kwilliams@shorecp.com

TECHNOLOGY COHORT

Leader: Imran Shaikh, *Chief Technology Officer*
ishaikh@shorecp.com

HUMAN RESOURCES COHORT

Leader: Sarah Gabriel, *Chief People Officer*
sgabriel@shorecp.com

BUSINESS DEVELOPMENT COHORT

Leader: Art Omilian, *Chief Business Development Officer*
aomilian@shorecp.com

CHIEF FINANCIAL OFFICER COHORT

Leader: Riley Looser, *Head of Resource Team*
rlooser@shorecp.com

Podcast Series




**BIGGER.
STRONGER.
FASTER.**

A podcast that explores the ways Shore Capital Partners brings billion-dollar resources to the micro-cap space. With this series, we highlight the array of resources Shore provides as well as their real-world impact, best-practices, and case studies.

All Episodes



EPISODES

The Shore Resource Team featuring Jeff Williams and Members of the SRT

The Leadership Academy featuring Michael Burcham and Anderson Williams

The Shore Capital CXO Program featuring Tom Smithburg and Members of the CXO Program

Strategy – The Shore Capital Approach featuring Michael Burcham, Mike Cooper, Chris Mioton, and John Nelson

Lead Independent Directors featuring Bill Clendenen, Sean McEnroe, Jim Forrest, Kevin Offel, and Dylan Bates

Human Resources Center of Excellence featuring Sarah Gabriel

Technology Center of Excellence featuring Imran Shaikh

Continuous Improvement Center of Excellence featuring Kevin Williams

RCM Center of Excellence featuring Sarah Hirsch

Payor Center of Excellence featuring Christy Vitulli

Data Center of Excellence featuring Ross Koenig



A podcast that captures the key issues, successes, challenges, and lessons learned in the microcap space through in-depth interviews with high-level leaders across Shore Capital and our portfolio companies.

All Episodes



A podcast that highlights the people who are building our companies from the inside everyday, often out of the spotlight. With this series, we hear their stories, find out what drives them, and how they inspire others with their work and message.



All Episodes





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