



## Learning Objectives

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Zodiak is a financial literacy and business acumen program that significantly enhances the knowledge and skills of learners. Knowledge objectives (what learners will understand) and skill objectives (what they will be able to do on the job) are listed below. *Note: Because the Connections exercises that follow the Zodiak business simulation are generally customized to address unique learning audiences or company-specific learning objectives, this list may vary.*

### Knowledge Objectives

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**As a result of participating in Zodiak for Sales Professionals, learners will be able to:**

- Define and use common financial terms like assets, liabilities, equity, depreciation and cash flow
- Construct and interpret three basic financial statements (income statement, balance sheet and cash flow statement)
- Explain the relationship and differences between profit and cash, including the importance of monitoring cash flow
- Compute and analyze key financial measures/ratios (return on equity, return on assets, return on sales, gross profit margin, etc.)
- Explain how strategic initiatives like capital investments, quality/process improvements, cash and debt management strategies, service chain/supply chain management, capacity utilization and new product development impact financial success
- Describe the importance of investing for the future (technology, sales/marketing, R&D, etc.) while balancing short-term profitability and shareholder return
- Explain the impact of product discounting, and customer-specific price increases and accurate sales forecasting on profitability
- Recognize and define organization- and client-specific financial terms, concepts and ratios
- Give examples of the story (strategies and initiatives) behind their organization's numbers (revenue, profit, margins, ratios)
- Identify ways in which their own personal actions and decisions impact the bottom line.

## **Skill (On-the-Job Behavior) Objectives**

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**After a Zodiac session, learners will be better able to:**

- Use relevant financial data and analysis in day-to-day decision making
- Demonstrate enhanced understanding of the organization's strategies and financial objectives
- Ask questions to clarify financial and strategic objectives when implementing new systems, processes or procedures
- Use financial terminology and concepts more confidently in discussions with others
- Analyze the financial results of a customer organization and the key strategies driving those results; understand the challenges customers face when making decisions within an ever-changing business environment
- Identify ways to sell bottom-line results to higher-level buyers
- Use customer analysis tools to determine financial issues that could influence buying decisions
- Investigate the "story" (strategies) behind the financial numbers of customer organizations for the purpose of better product/service positioning
- Develop an action plan around how to use financial knowledge with customers to impact sales success

*Note: Organizations are encouraged to have learners implement a Personal Impact Project after the session. Guidelines and tools are provided in the Zodiac program.*