

Investment Snakes and Ladders: Advanced

"Climb the Ladder to RICHES!" – Dr. Leigh Kibby



Tuesday 06 October 2007

Investment Snakes and Ladders: Ad

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Investment Snakes and Ladders: Ad

Publisher

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REMEMBER!!!!!!!!!!

**INVESTMENT SNAKES AND LADDERS IS A GAME
AND IS NO SUBSTITUTE FOR PROFESSIONAL
ADVICE.**

To learn more about these Kinematic programs, or Accreditation in the use of Kinematic training programs, visit the Kinematic website (<http://www.kinematic.com.au>)

This Booklet is FREE and FREE to GIVE AWAY on the conditions that:

- **copyright and ownership of the intellectual property associated with the game is attributed to Dr. Leigh Kibby**
- **the game is not to be on-sold to others nor used in workshops nor books without the signed written approval of Dr. Leigh Kibby.**

Investment Snakes and Ladders: Ad

Background to INVESTMENT S&L : Ad

Purpose of the INVESTMENT S&L Ad (Advanced) Game

The purpose of Investment S&L Snakes and Investment is to help participants become more successful at managing their Investments by:

- Understanding risks
- Seizing opportunities
- Balancing Risk against Gain.

Playing the INVESTMENT S&L Game

The following is a step-by-step instruction for playing INVESTMENT S&L: Ad.

It is best played with other investors or your investment advisor.

Tools and Equipment you will need

Game Board printed out to A2 size or larger and then laminated (use the board supplied at the end of this manual).

Game pieces cut out from document (as supplied at the end of this manual).

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Introduction to INVESTMENT S&L: Ad

Step 1:

Game Purpose

Investment S&L Snakes and Ladders is the ultimate game for understanding INVESTMENT strategies and managing risk to make, and maximise, gains.

The purpose of Investment S&L Snakes and Ladders is to teach strategies, skills and attitudes of successful investment management. Remember, all three are important! attitude determines the adoption of strategies and the use of skills.

Playing Objective of the Game

All players have the chance to become the BILLIONAIRE or attain the level they most desire. However, to succeed they need to:

- Build success by making wise decisions and seizing opportunity i.e. climbing ladders
- Manage Risks and overcome setbacks i.e. wrestling with snakes and
- Make the most money!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

Investment Snakes and Ladders

Designing the Snakes

Step 2:

Objective:

Participants are to create representations of the “Snakes” using the following criteria.

- Risks and Risk Management i.e. the risk around different types of investments and not having, nor sticking to, a risk strategy or plan
- Market Fluctuations i.e. changes in market dynamics
- Personal Circumstances i.e. sudden or unplanned changes to your cash flow needs
- Personal Knowledge i.e. not understanding the nature of the investment
- Advice i.e. not seeking, nor heeding, advice
- Misinformation i.e. being poorly informed.

Methodology:

1. Using the “Snake Design Guide” participants/groups are to describe the snakes:
 - a. They have caught or been caught by
 - b. They have seen catch others
 - c. That have harmed their investments.
2. When returning to the playing table, participants/groups take turns to draw their snakes anywhere on the playing board using the following rules
 - a. Low poisonous Snakes move people down 20 places
 - b. Medium poisonous Snakes move people down 40 spaces
 - c. High poisonous Snakes move people down 60 spaces
3. This process continues until all snakes are drawn
4. Snakes must have the following colours
 - a. Risks and Risk Management - Red
 - b. Market Fluctuations - Orange
 - c. Personal Circumstances - Purple
 - d. Personal Knowledge - Yellow
 - e. Advice - Green
 - f. Misinformation - Brown

Key Learning Points:

- a. People must not explain what their Snakes do as this will be revealed during play
- b. Participants/groups are not obliged to have one of each type, they simply create the number that best represents their understandings.

The “Snakes Design Guide”.

| Name | Snake Description | Snake Impact | Snake Type | Its impact i.e. is it a very poisonous snake Or only slightly poisonous |
|--------------------------------|---|---|--|---|
| Write in a name for your snake | Describe what the snake does – use an example | Write about the outcome the snake produced i.e. what happened to your investment(s) | Risks and Risk Management - OR Market Fluctuations - OR Personal Circumstances OR Personal Knowledge - OR Advice – OR Misinformation | Rate Low OR Medium OR High |
| | | | | |
| | | | | |
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| | | | | |

Investment Snakes and Ladders: Ad

Designing the Ladders

Step 3:

Objective:

Participants are to create representations of the “Ladders” using the following criteria.

- Expertise i.e. smart ideas or approaches that have helped them
- Experience i.e. past learnings (their own or that of others)
- Information Resources i.e. data and information resources (internet, blogs, forums, seminars, people, professionals etc) that have proved helpful
- Patterns and Predictions i.e. event patterns that were accurate upon which you took action
- Personal Attitude i.e. the attitudinal approaches that helped you, or others, succeed.

Methodology:

1. Using the “Ladder Design Guide” participants/groups are to describe the Ladders:
 - a. They have stepped onto
 - b. They have seen others climb
 - c. That have helped them manage their investments
2. When returning to the playing table, participants/groups take turns to draw their Ladders anywhere on the playing board using the following rules
 - a. Low help Ladders move people up 10 places
 - b. Medium help Ladders move people up 30 spaces
 - c. High help Ladders move people up 50 spaces
2. This process continues until all Ladders are drawn
3. Ladders must have the following colours
 - a. Expertise - Gold
 - b. Experience - Maroon
 - c. Information Resources - Black
 - d. Patterns and Predictions - Blue
 - e. Personal Attitude – Grey or Silver

Key Learning Points:

- a. People must not explain what their Ladders do as this will be revealed during play
- b. Participants/groups are not obliged to have one of each type, they simply create the number that best represents their understandings.

The "Ladders Design Guide".

| Name | Ladder Description | Ladder Impact | Ladder Type | Its impact i.e. is it a very helpful Ladder Or only slightly helpful |
|---------------------------------|--|---|---|--|
| Write in a name for your Ladder | Describe what the Ladder does – use an example | Write about the outcome the Ladder produced i.e. who and what did it hurt and what was the impact on the organisation | Expertise – OR Experience - OR Information Resources - OR Patterns and Predictions - OR Personal Attitude | Rate Low OR Medium OR High |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Investment Snakes and Ladders: Ad

Playing the Game

Step 4:

Objective:

Participants are to experience INVESTMENT Snakes and Ladders.

Methodology:

1. Participants choose an Icon/Archetype that represents how they see themselves as an investor
2. Participants start at the beginning of the playing Board (as provided later in this manual)
3. The Game is played according to the rules outlined in “Playing the Game” (see below)
4. The following movement rules apply:
 - a. Moves are numerical according to the numbers rolled on the dice i.e. ignore the numbers in the square
 - b. To cross into higher levels of INVESTOR EXCELLENCE, the following applies:
 - i. Hack, participants/groups must roll a 10 or better to go up
 - ii. Novice, participants/groups must roll an 11 or better to go up
 - iii. Apprentice, participants/groups must roll a 12 to go up
 - iv. Navigator, in two consecutive rolls, participants/groups must score 20 or better to go up
 - v. Mega-Investor, in two consecutive rolls, participants/groups must score 22 or better
5. If unable to move upwards, participants can ask anyone above them for support to move up to the next level. The highest player in the game then “interviews” the participant and, based on the answers, decides whether the person can move up.
6. Each participant has a “Investment Portfolio” combining a mixture of the following assets:
 - a. Resource stocks
 - b. Manufacturing
 - c. Banks and Finance Companies
 - d. Utilities
 - e. Farming
 - f. Superannuation and/or Life Assurance
7. Each participant has an “Investment Bank” which consists of the dollar value of their investments. This dollar value is a calculation of the Asset multiplied by the “Worth” of the Asset as indicated on the Playing Board.

Playing the INVESTMENT S&L: Ad Game

Step 1. Moving on the Board

Players roll the dice and move the combined number on the Board and then take action as described on the relevant square. If that Square is someone's Snake or Ladder, then the "Snakes and Ladders" rules apply.

Step 2. Snakes and Ladders Rules

If you move onto a Snake, you must move down the Snake. The person who owns the Snake describes what it is.

Before moving from the Snake's tail, players must describe a situation in which they have dealt with such a Snake. The most senior person on the Board decides whether the action would succeed. Either this, or the player must roll a 10 or better to move on.

If you move onto a Ladder, you have the opportunity to move up the Ladder. The person who owns the Ladder describes what it is.

Before moving up the Ladder, players must describe a situation in which they have used a same/similar Ladder. The most senior person on the Board if there is none, decides whether the action would succeed. Either this, or the player must roll a 10 or better to move on.

Please note that this engenders vibrant discussion and interaction amongst players.

Step 3. Adding to Your Portfolio

You add an asset by landing on an asset + square and rolling a die. The number of the die indicates the asset you get (see below). You lose an asset when landing on an asset – square and rolling the die. The number on the die indicates the asset you lose. If you do not have that asset, you lose \$10 000 times that amount of money.

Assets available on the die:

1. Resource stocks
2. Manufacturing
3. Banks and Finance Companies
4. Utilities
5. Farming
6. Superannuation and/or Life Assurance

Step 4. Adding to Your Investment Bank i.e. Making Money

When you land on the \$+ square, you can increase your Asset Value. To do this, roll the die. If you have the asset indicated by the number on the die (see Step 3 above), then you roll the die again and increase your Investment Bank by \$ 10 000 times the number you roll on the die. If you have 2 or 3 or more of those assets, increase your Investment Bank by \$20 000, \$30 000 or more depending on the number of those assets you hold. If you land on a \$- square, the reverse happens and you lose the “asset” in money on the same basis as described here.

If you do not have the Investment named, you must sell off another investment to the same value.

If you have no other investment, you become in debt. When in debt, any new money earned is simply paid off against the debt.

Keep track of your Investment Bank using the Investment Bank proforma at the end of the game.

Step 5. Winning the Game

The game winner is the person who has the highest value Investment Bank, in total dollar value, at the end of the game.

NOTE. Confidentiality

Players are not required to reveal the value of the Investment Bank. It is a matter of the player’s choice.

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Debriefing the Game

Step 5:

Objective:

Participants are to understand how they play with the current Snakes and Ladders.

Methodology:

This is a group discussion to understand what participants experienced in the game. Achieve this by forming participants into small groups asking the following questions:

1. What worked for you?
2. What did not work for you? Why?
3. What did you learn about the organisation?
4. What did you learn about yourself?

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Personal Commitments

Step 6:

Objective:

Participants are to use their insights and learning goals to make commitments based on the future.

Methodology:

Each participant is to answer the following questions and present their answers to the group.

1. What I most learnt about me
2. What I most learnt about my investment approaches
3. The action I will take
 - i. tomorrow,
 - ii. next week and
 - iii. all this yearto achieve the changes I want and
4. How I will measure success.

Key Learning Points:

- a. Where commitments are vague, ask people how they will know when it is achieved i.e. what they will understand more clearly or be able to do better.
- b. Ask how they will be able to identify the above i.e. what new behaviour or skill will they have.

Investment Snakes and Ladders

INVESTMENT S&L Creator: Dr. Leigh Kibby

Dr. Kibby, known as “Dr. Leigh,” is a one of the world’s truly creative geniuses having:

- founded the Noetic Psychology movement
- developed numerous new paradigms such as:
 - Neuro-Empathic Programming
 - the Sustainability Triangle (Psychology-Sociology-Ecology),
 - L.E.T. (Language-Emotion-Thought) framework,
 - Affective-Cognitive Integration Model (the NEW Emotional Intelligence),
 - “The Intelligence of Emotions” and
 - Psychological Genome concept.

He is also one of Australia’s leading trainers having taught Noetic techniques to over 2500 people including General Practitioners (Family Physicians), Police, teachers, youth workers and IT staff and magers.

Other Business Games provided by Kinematic and developed by Dr. Kibby include:

- The Foresight Saga
- The Moral Dilemma
- The Destiny Game and
- INVESTMENT S&L Chess.

Other Games by Dr. Kibby include:

- Take- 2
- The Destiny Game
- Spellcheck
- The Money Game Board
- Snap PLUS.

Qualifications

- **PhD Thesis – Affective-Cognitive Integration: A Test and Developmental Program**
Deakin University, Victoria – completed 2005
- **Graduate Diploma in Group Work and Counselling, 1989**
Adelaide University, South Australia
- **Bachelor of Education, 1986**
Deakin University, Victoria
- **First Year Journalism, 1984**
Deakin University
- **First Year Legal Studies, 1984**
LaTrobe University
- **Diploma of Teaching, 1979**
RMIT University, Victoria









Publications / Presentations

- Joint Winner of the Best Paper Award at the 2002 International Emotions In Organisations Conference.
- "Servant-leadership" - 2003 British Academy of Management Conference.
- "Noetic Leadership" - 2003 British Academy of Management Conference.
- "Servant-leadership Skills" - 2004 Gallup Leadership Institute Conference USA.
- "Noetic Leadership Skills" - 2004 Gallup Leadership Institute Conference USA.
- "Noetic Leadership: A Conceptual Model" - 2006 Gallup Leadership Institute Conference USA.
- Co-author of "Intelligent Emotions Management" for the internationally released book "Key Issues in Organisational Communication"
- "Well-being through Responding to Affect: Core Skills and Techniques" presented to the 2006 Australian Quality of Life Conference
- "Coaching Skills for Responding to Affect" International Journal of Evidence Based Coaching and Mentoring, 2007
- "Ethics, Morals and Behaviour through Coaching Skills for Responding to Affect" paper Accepted for British Academy of Management, 2007
- "Noetic Coaching Skills: Creating Meaning and Purpose" Book Chapter, 2007 (in draft)
- "Noetic Leadership - a Conceptual Model of Leadership Integrating Affect, Cognition and Physiology," 2007 (in review)

INVESTMENT S&L Snakes and Ladders Advanced Playing Board

| | | | | | | | | | |
|------------------|------------|-----------|------------|-----------|------------|------------|-----------|------------|------------|
| <u>Game Over</u> | 135 + | 134 | 133 \$+ | 132 | 131 | 130 \$+ | 129 + | 128 | 127 \$+ |
| Mega Investor | 118 | 119 + | 120 \$+ | 121 | 122 \$- | 123 | 124 | 125 \$+ | 126 |
| | 117 | 116 | 115 \$+ | 114 + | 113 \$- | 112 \$+ | 111 | 110 + | 109 |
| | 100 \$- | 101 - | 102 | 103 + | 104 \$+ | 105 + | 106 | 107 | 108 \$+ |
| | 99 \$+ | 98 | 97 | 96 | 95 \$+ | 94 | 93 | 92 | 91 \$+ |
| Navigator | 82 - | 83 \$+ | 84 \$- | 85 | 86 \$+ | 87 | 88 | 89 \$- | 90 |
| | 73 | 74 | 75 | 76 \$+ | 77 | 78 \$- | 79 \$+ | 80 | 81 - |
| | 72 | 71 | 70 \$+ | 69 | 68 \$- | 67 \$+ | 66 | 65 | 64 - |
| Apprentice | 55 \$- | 56 | 57 \$+ | 58 - | 59 \$- | 60 | 61 \$+ | 62 | 63 - |
| | 54 | 53 + | 52 | 51 | 50 \$+ | 49 | 48 \$- | 47 | 46 |
| Novice | 37 \$+ | 38 | 29 \$- | 40 | 41 - | 42 | 43 - | 44 \$- | 45 + |
| | 36 | 35 | 34 + | 33 \$+ | 32 - | 31 | 30 \$- | 29 | 28 |
| | 19 + | 20 \$- | 21 | 22 | 23 - | 24 \$- | 25 | 26 + | 27 |
| Hack | 18 \$- | 17 - | 16 \$- | 15 + | 14 \$+ | 13 | 12 + | 11 \$- | 10 |
| | 1 | 2 | 3 + | 4 | 5 - | 6 | 7 + | 8 \$- | 9 |

Investment Snakes and Ladders Icons i.e. Playing Pieces

| Investor Characteristic | INVESTMENT S&L Image |
|-------------------------|--|
| Mogul |  |
| Stockbroker |  |
| Chartist |  |
| Advisor |  |
| Bean Counter |  OR  |
| Friend |  |
| Self |  |

Investment Snakes and Ladders – Investment Bank

| Asset Name | Dollar Value | | Running Total |
|--|--------------|-------|---------------|
| | + | - | |
| Resource stocks | _____ | _____ | _____ |
| Manufacturing | _____ | _____ | _____ |
| Banks and Finance Companies | _____ | _____ | _____ |
| Utilities | _____ | _____ | _____ |
| Farming | _____ | _____ | _____ |
| Superannuation and/or Life Assurance | _____ | _____ | _____ |
| Money | _____ | _____ | _____ |
| Total | | | _____ |