

## Training & Facilitation Outlines Catalog



**LEADERSHIP**coaching

**Unleash Your Potential.**

**i**identity **i**ntelligence™ **i**nventory



**YOUNGADULT**coaching

**YOU. Only Better.™**



**LEADERSHIP**coaching

**Unleash Your Potential.**



**ROUNDTABLE**coaching

**Business Success.  
Life Significance.**



## ***Table of Contents***

PART I: THE PROFESSIONAL SERIES .....	6
Influential Leadership.....	6
Performance Planning .....	7
FLEX Your Communication Style / Effective Delegation .....	9
Team Building.....	11
Effective Motivation Techniques & One Minute Management .....	12
Managing Conflict.....	14
Running Effective Meetings – C.A.N.V.A.S.....	15
Creative Problem Solving – E.I.N.S.T.E.I.N.....	17
Change Management & Motivation .....	19
Learning Objectives .....	19
Power Public Speaking and Great Presentations 1 .....	20
Power Public Speaking and Great Presentations 2 .....	21
Business Writing that Works.....	22
PART II: SOFT SKILLS .....	23
Advanced Writing Skills .....	23
Anger Management - Understanding Anger .....	24
Effective Time Management .....	28
Budgets And Managing Money .....	30
Building Better Teams.....	32
Change And How To Deal With It.....	34
Change Management For Employees .....	35
Change Management For Managers.....	36
Communicating Across Cultures .....	36
Communication Strategies.....	38
Conducting Effective Performance Reviews .....	40
Creative Problem Solving – E.I.N.S.T.E.I.N.....	44
Conflict Resolution - Dealing With Difficult People.....	45
Customer Service Skills .....	47
Customer Service Training - Critical Elements of Customer Service .....	48
Customer Service Training - Managing Customer Service.....	49
Delegation - The Art Of Delegating Effectively.....	50
Emotional Intelligence for Managers .....	51
Effective Presentations .....	52

Excellence in Technical Customer Service .....	53
Facilitation & Presentation Skills .....	54
Facilitation: Becoming A Great Trainer .....	55
Grammar Essentials .....	57
Hiring Smart - Behavioral Interviewing Techniques.....	59
Human Resources Training: HR For The Non HR Manager .....	61
Inventory Management The Nuts & Bolts Of Inventory And Warehouse Management .....	63
Leadership Training - Becoming Leadership Material .....	65
Management Skills For The Administrative Assistant .....	68
Managing Conflict.....	70
Managing Innovation And Creativity.....	70
Marketing And Sales.....	72
Motivating Training - Motivating Your Workforce .....	73
Motivating Your Employees .....	75
Negotiating For Results .....	76
Negotiating Skills .....	79
Orientation Handbook - Getting Employees Off To A Good Start.....	81
Performance Management.....	81
Performance Management - Managing Employee Performance .....	83
Practical Leadership .....	85
Problem Solving & Decision Making.....	87
Project Management Training - Understanding Project Management.....	89
Public Speaking: Tools for Confident Communication .....	92
Running Effective Meetings: The C.A.N.V.A.S. Model .....	94
Sales - Prospecting For Leads Like A Pro .....	96
Sales Training- Selling Smarter.....	97
Speakeasy.....	99
Strategic Planning Skills .....	100
Successful Business Writing .....	102
Supervisor Training - The ABC's Of Supervising Others.....	103
Team Building - Developing High Performance Teams.....	105
Telemarketing - Using The Telephone As A Sales Tool.....	107
The Minute Taker's Workshop .....	108
The Professional Supervisor .....	110
Time Management - Get Organized For Peak Performance .....	112
Train The Trainer - The Practical Trainer.....	114
Writing Reports And Proposals .....	115
PART III: ADVANCED MANAGEMENT & LEADERSHIP TOPICS.....	117



PART IV: HARD SKILLS .....	118
2007 New Features For IT Professionals, Advanced Users, & Trainers .....	118
Adobe InDesign .....	118
Microsoft Access Level I .....	119
Microsoft Access Level II .....	121
Microsoft Access Level III .....	123
Microsoft Access – 2007 New Features .....	124
Microsoft Advanced .....	124
Microsoft Excel Level I .....	126
Microsoft Excel Level II .....	128
Microsoft Excel Level III .....	130
Excel Level IV .....	132
Microsoft Excel – 2007 New Features .....	133
Excel – 2007 Level I .....	134
Excel – 2007 Level II .....	136
Microsoft Excel – 2007 Level III .....	138
Microsoft Outlook Level I .....	140
Microsoft Outlook Level II .....	142
Microsoft Outlook Level III .....	143
Microsoft Outlook – 2007 New Features .....	145
Microsoft PowerPoint Level I .....	146
Microsoft PowerPoint Level II .....	148
Microsoft PowerPoint – 2007 New Features .....	150
Microsoft Word Level I .....	151
Microsoft Word Level II .....	153
Microsoft Word Level III .....	155
Microsoft Word – 2007 New Features .....	157
Microsoft XP Pro Level I .....	158
Microsoft XP Pro Level II .....	159
Photography .....	160

# PART I: THE PROFESSIONAL SERIES

## Influential Leadership

---

### Leaders & Leadership Traits

- Characteristics that Followers Admire in a Leader

- Defining Leadership

### Personal Vs. Organizational Leadership

- Stimulus/Response Model

### Leadership Pyramid

- Results (Efficiency & Effectiveness)

### Situational Leadership

- Management Style Continuum

- Direction and Support (Primary Behaviors)

- Three Situational Leadership Skills

- Situational Leadership Styles Maturity

  - of the Follower

  - Leading at the Edge of Chaos

  - Goals of Situational Leadership

### Making the Transition to Supervisor Responsibilities

- of a Supervisor

- Case Study – The New Supervisor

- Case Study - The Friendly Supervisor

### ***S.L. LEARNING OBJECTIVES***

With a host of new challenges and responsibilities to tackle, supervisors need training like never before. Learning how to supervise your new employees on a trial and error basis can lead to discouragement. This workshop can help you overcome many of the supervisory problems a new “boss” may encounter – or a current boss with a new employee.

### ***AT THE CONCLUSION OF THIS WORKSHOP:***



- You will acquire a basic understanding of leadership and management.***



- You will understand the need for flexibility in your leadership and management style.***



- You will clarify the scope and nature of a supervisory positions***



- You will learn some ways to deal with the challenges of the role***

- You will recognize the responsibilities you have as a supervisor, to yourself, your team and your organization***









## Performance Planning

---

Efficiency and Effectiveness The  
Road Map  
Execution Effectiveness  
Values  
Seeking Alignment The  
Org Chart  
Facets of Effective Organizations  
Leadership Pyramid Leadership  
Building Blocks  
Personal and Organizational Alignment  
Keys to Personal Success Planning  
Systems and Processes  
Relationships  
Managing Our Environment  
Managing Our Information  
The Power of Process  
Productivity Factors  
What Is Time Management?  
Importance vs. Urgency Importance  
Urgency  
Time Management Map Laws  
of the Land  
Determine Roles  
Setting Goals S.M.A.R.T.  
Goals  
Goal Setting Sequence  
Weekly Planning  
Daily Planning  
Take Action (Execution)  
Barriers To Productivity Reasons  
Not to Plan  
Interruptions  
Procrastination  
Strategize (Top Down Planning) Define  
Values  
Develop Mission Mission Statement  
Examples  
Role Determination

**PERFORMANCE LEARNING OBJECTIVES**

-  ***Understand processes to plan and prioritize effectively***
-  ***Alignment of personal goals and actions with team and organizational goals***
-  ***Employ the principles of effective goal setting and time management***
-  ***Overcome the effects of urgency addiction***
-  ***Understanding roles and need for balance***
-  ***Developing personal mission and values***





## FLEX Your Communication Style / Effective Delegation

---

### COMMUNICATION

Case Study: Barriers To Communication  
Purposes of Communication

### YOUR STYLE

Behavior Self Assessment  
Communication Behaviors - ASSETS  
Communication Behaviors - LIABILITIES  
At a Glance  
Recognition and Strategies  
Strategies Effective Usage  
Level 1 – Build Personal Strengths and Relationships  
Level 2 – Supervisory Tool  
Level 3 – Developing Teams and Strategic Partnerships  
Level 4 – Understanding Life Long Challenges

### LISTENING as a Communication Tool

Communicating Effectively  
Communication Loop Chart  
Communication Elements Chart  
The 5 Levels of Listening  
Effective Communication Methods Table







### EMPATHIC COMMUNICATION

Key steps to effective empathy  
Barriers to Communicating Empathically  
Attitude vs. Skill  
Empathy, Sympathy and Pity  
Empathic Listening  
Empathic Listening Practice  
The Faithful Translator

### DELEGATION

Advantages & Disadvantages of Delegation  
Elements of Effective Performance Agreements  
Dos and Don'ts of Delegation  
Degrees of Delegation The  
Delegation Fallacy  
Your Delegation Effectiveness

**COMMUNICATION LEARNING OBJECTIVES**

-  ***Enhance Self-Discovery***
-  ***Understand & Appreciate Others***
-  ***Self-Discovery: Self Awareness: EQ & SQ – information they***
-  ***Understand different work styles/needs***
-  ***Identify friction points***
-  ***Learn techniques to improve relationships***

***Develop effective listening skills***

***Develop delegations skills***



## Team Building

---

### TEAMWORK ACTIVITY LOG

Defining Teams and Teamwork Characteristics  
of an “Ideal” Team  
Facets of Effective Teams (Organizations)  
Benefits of Effective Teams  
Types of Teams  
Teams at Evans Bank

### TEAMWORK ACTIVITY LOG

Team Roles: Clarity & Responsibility  
Essential Teamwork Skills & Behaviors  
Building Trust  
Valuing Diversity  
Loyalty – A Key to Teamwork

### TEAMWORK ACTIVITY LOG

Essential Team Leadership Skills & Behaviors  
Team Dynamics  
Stages of Team Development

### TEAMWORK ACTIVITY LOG

Improving Team Performance  
Leadership  
Evaluating Team Performance  
Learning Journal

## **TEAM BUILDING** *LEARNING OBJECTIVES*



*Identify and explore the characteristics and benefits of teams.*



*Understand the dynamics of teams as team leaders and members.*



*Review and build skills that improve effectiveness in teams.*

*Teambuilding Activities – Benefits of Teams – Team Dynamics –*

*Skills for Effectiveness -*

## Effective Motivation Techniques & One Minute Management

---

### MOTIVATION

Defining Motivation

Intrinsic

Extrinsic

Personal & Inter-Personal Motivation

Motivational Theories

FLOW: How Job Assignments Effect Motivation

The Importance of Emotional Buy-in

The Influence of Motivation on Job Performance

Chart: Job Motivation Assessment

Chart: Ranking of Job Motivation Factors

### MOTIVATING OTHERS

Leadership Power and Influence

Best Management Style to Motivate Effectively

Situational Leadership

Goals of Situational Leadership

Evaluating Maturity

The One Minute Management Style

Essential Elements of Commitment and Good Morale

### ONE MINUTE MANAGEMENT

Three Secrets of One Minute Management

One Minute Goals

Goals Confidence Assessment

Evaluating Performance

One Minute Praising

One Minute Reprimand

Job Performance Coaching

Building a Circle of Trust

Relationship Bank Account

Recognition and Reward

Motivating On a Budget

### MOTIVATION LEARNING OBJECTIVES





***Identify ways to link motivation to employee performance***

***Recognize the external factors that can influence performance***

***Discover ways to build and encourage employee accountability***

***Learn effective strategies to encourage and sustain employee trust***

***Learn how to lead others through change***

# Managing Conflict

---

## UNDERSTANDING AND RECOGNIZING CONFLICT

Defining Conflict

Coming to "Terms" with Conflict

Conflict Awareness

Ways of Seeing Conflict

Personal Responses to Conflict

Developing Healthy Perspectives towards Conflict

## STRATEGIES for RESPONDING to CONFLICT

Conflict Management Strategies

## CRUCIAL CONFRONTATIONS

I. Good Confronting = Good Leadership

II. Focus for Successful Confrontation

III. How & Why to Confront

IV. Barriers to Successful Confrontation

V. Crucial Confrontations Timing Chart

A) Before the Confrontation

B) During the Confrontation

C) After the Confrontation




## MOVING THROUGH CONFLICT TO SOLUTIONS

Determining & Implementing Best Solutions

Facilitating and Mediating

CPR: Dealing with Escalating Problems

## LEARNING OBJECTIVES

-  ***To develop skills to assess a conflict situation and monitor your reaction to the conflict.***
-  ***Learn to utilize effective communication techniques to manage conflict in a proactive manner.***
-  ***Resolve conflict by determining it's source, and developing and implementing the best solution.***



## Running Effective Meetings – C.A.N.V.A.S.

### Running Effective Meetings: The *C.A.N.V.A.S.* Model

#### **Lesson 1 – Meetings as a Management Tool**

- Three Primary Purposes for Meetings
- Top 4 Frustrations Of Meeting Attendees
- Factors that Influence Determine Meeting Effectiveness
- Effect of Meetings on Productivity
- Calculating Meeting Salary Cost
- Meeting Communication Elements Chart
- Meeting Effectiveness vs. Meeting Efficiency

#### **Lesson 2 – PLANNING the Meeting**

*C*

##### **Meetings Step 1 – .clarity**

- Fundamental Purpose of Meetings
- Meeting Purpose & Planning Framework Table
- Establish Leadership
- Primary Skills of the Leader
- Rate Your own Meeting Leadership Skills

##### **Meetings Step 2 – A.ttendees**

- Choosing the Attendees
- Environmental Considerations: 1) Physiological & 2) Psychological
- Purposes of the Agenda
- Tools for Predefining Expectations

#### **Lesson 3 – CONDUCTING the Meeting**

*N*

##### **Meetings Step 3 – .avigation**

- Keys to Effectiveness
- Tactics for Managing Discussion

*V*

##### **Meetings Step 4 – .elocity**

- Creating, enforcing, & reinforcing the Code of Conduct
- Dealing with Inappropriate Behavior in Meetings
- Facilitation & Presentation Skills
- Dealing with Time and Pace: Methods for Effective Use of Time

## Lesson 4 – FOLLOW-UP

### Meetings Step 5 – **A**.ccountability

- Measuring Meeting Success
- Reaching Closure & Sharing Feedback

### Meetings Step 6 – **S**.ynchronization

- Distribute Notes or Confirmation
- As the Leader, Follow-Up after the Meeting
- Ascertaining best practices for following up meetings

## Lesson 5: MEETING MINUTES

- Note Recorder Styles and Recording Formats
- Note Taking Tools

### Learning Objectives

- Understand how to use meetings as a management tool*
- Employ the key planning steps that ensure meeting effectiveness*
- Define the intended minimum and optimum outcomes for meetings*
- Apply tools and methods for facilitating efficient and productive meetings*
- Understand how to create participative meeting environments*
- Manage participant behavior as a facilitator*
- Develop accountability & follow through after meetings*

*Develop commitment & specific actions to improve meetings in which you personally participate*

### The benefits that we are seeking:

- Elimination of unnecessary meetings*
- Increased meeting productivity*
- An organizational culture that promotes results based meetings*
- Improved team and organization communication and performance*





## Creative Problem Solving – E.I.N.S.T.E.I.N.

EINSTEIN Method of CPS **Lesson 1 – INTRODUCTION** † Self  
Assessment – Ascertaining Your Problem Solving Style

- † Defining “Problem”
- † Factors affecting Initiative and Accountability
- † Converge <> Diverge: creating problem solving Ground Rules

### **Lesson 2 – DEFINE the PROBLEM** † (step 1) **E.valuate**

The “Problem” † Root Cause Analysis (RCA) Process  
Description † Cause and Effect Diagram † The Mind  
Mapping Process † (step 2) **I.nvestigate** Potential  
Solutions † Methods to Generate Potential  
Solutions † Brainstorming Warm-Up † (step 3)

**N.arrow** the Focus † Multi-Voting

- † Develop Workable Solutions using Pluses, Potentials and Concerns

### **Lesson 3 – IMPLEMENT the SOLUTION** †

(step 4) **S.olve** the Problem

- † (step 5) **T.est** the Solution

### **Lesson 4 – FOLLOW THROUGH** †

(step 6) **E.valuate** the Result †

(step 7) **I.mprove** the Solution

(step 8) **N.ominate** and Celebrate

---

### **CPS LEARNING OBJECTIVES{ XE "LEARNING OBJECTIVES" }**

Challenges and opportunities appear constantly in today’s workplaces that have the potential to expend and creatively release human energy. The skills and processes taught in Creative Problem Solving direct that energy towards positive outcomes. This course will teach the fundamentals of problem solving skills – from defining the problem, identifying and implementing solutions, and gaining buy-in from key decision makers in the organization.

### **In this course you will:**

- C** Understand processes for solving problems logically.
- C** Define the true issue of a problem or nature of an opportunity.
- C** Apply methods for solving problems systematically.
- C** Examine strategies for acquiring decision acceptance when problem solving .
- C** Understand personal and organizational barriers to creativity.
- Become familiar with problem solving tools, i.e. brainstorming, mind mapping, root cause analysis.

## ***You'll Benefit By Learning To:***

- C* Increase problem solving capacity.
- C* Increase creative energy and prudent risk taking.
- C* Distinguish root causes from symptoms to identify the right solution for the right problem.
- C* Improve your response to challenges and increase the timeliness of your response.



## Change Management & Motivation

### MOTIVATION

- Defining Motivation Intrinsic
  - Extrinsic
- Personal & Inter-Personal Motivation
- Motivational Theories
- FLOW: How Job Assignments Effect Motivation
- The Importance of Emotional Buy-in
- The Influence of Motivation on Job Performance Chart:
  - Job Motivation Assessment
  - Chart: Ranking of Job Motivation Factors

### MOTIVATING OTHERS

- Leadership Power and Influence
- Best Management Style to Motivate Effectively
  - Situational Leadership
  - Goals of Situational Leadership
  - Evaluating Maturity

### THE ONE MINUTE MANAGEMENT STYLE

- Essential Elements of Commitment and Good Morale
- Three Secrets of One Minute Management
- One Minute Goals
  - Goals Confidence Assessment
  - Evaluating Performance
- One Minute Praising
- One Minute Reprimand

### JOB PERFORMANCE COACHING

### BUILDING A CIRCLE OF TRUST Relationship

- Bank Account
- Recognition and Reward
- Motivating On a Budget

### LEADING THROUGH CHANGE

- Leadership
- Personal Change Model
- The Eight Steps to Successful Change

## Learning Objectives

*Identify ways to link motivation to employee performance*

*Recognize the external factors that can influence performance*

*Discover ways to build and encourage employee accountability*

*Learn effective strategies to encourage and sustain employee trust*

*Learn how to lead others through change*

# Power Public Speaking and Great Presentations 1

---

## PURPOSES OF PRESENTATIONS

### LISTENING in COMMUNICATION The

Dynamic Equivalent

WB5P: Personality in Listening

Elements of Communication Chart

Effective Communication Methods Table

Empathic Communication

Empathic Listening

### PERSUASIVE BEHAVIORS: YOU DiSC

Behavior Self Assessment

DiSC Behaviors - ASSETS

DiSC Behaviors - LIABILITIES

### PERSUASIVE BEHAVIORS: OTHERS

DiSC at a Glance

DiSC Recognition and Strategies

DiSC Strategies Effective Usage

## PRESENTATIONS

Role of Emotional Intelligence in Speeches & Presentations

VAK: Learning Styles & Presenting

Facilitation Skills

Managing Disruptive Behaviors

ALPS: Speaking & Learning Styles

## MEETINGS

Top Frustrations & Failures of Meetings

General Components of a Meeting

Learning Journal

## SPEECHES

7 Reasons Why Speakers Flop

Conflict: An Outcome Metaphor for Presentations, Meetings, & Speeches

Rhetoric: Strategies for Presentations

Quick Tricks for Public Speaking

The Great Art of Story Telling

Communication Philosophy

Speaking with Presentation Software

Phases & Types of Presenters

Anxiety Reducers 56

Initial Stages of Speech Development



## Power Public Speaking and Great Presentations 2

---

### 3 KEY LEADERSHIP SKILLS 7

#### REASONS WHY SPEAKERS FLOP

##### E.I. / E.Q.

- E.I. Phases & Types of Presenters Presentations  
& E.I.

- Anxiety Reducers

#### PHYSICAL SKILLS

- Body Language \* Voice \* Eyes

- VAK

- Visuals

#### DEMOGRAPHIC SKILLS

- ALPS: Speaking & Learning Styles

- Know Your Audience

- Audience Assessment Worksheet

#### IDEAS & TIPS for SPEAKING Quick

- Tricks for Quick Speaking

- Story Telling

- Presentation Software

#### PLANNING, CREATING & ORGANIZING YOUR SPEECH

- Key Considerations

- Rhetoric Strategies Action

- ("Do This") Formats

- Information ("Know This") Formats

- Speech Preparation Checklist

#### SPEECHES

- Practice Presentations

---

## Business Writing that Works

---

Introduction and Course Overview Why

Write?

The First C

The Second C

The Third C

The Fourth C

Word Agreement

Active and Passive Voice

Sentences and Sentence Types

Readability Index

The Fifth C

Practical Language

Inclusive Language

Sentence Construction

Punctuation

Writing Business Letters

Reports

Spelling & Proofreading

Writing Memos

E-Mail Etiquette

Writing Challenges



# PART II: SOFT SKILLS

## Advanced Writing Skills

**OVERVIEW:** This is a one-day workshop for those who already are good writers. Our time will be devoted to writing letters of congratulation, of persuasion, of refusal or of action, that reflect current word usage and up-to-date formats. You can also become more skilled at writing to write professional memos that are brief but concise, clear yet direct, complete and correct.

### LEARNING OBJECTIVES

- Learn the value of good written communication
- Revisit the rules of good grammar and clear communication -Develop an appropriate letter-writing style
- Improve sentence construction and paragraph development
- Develop effective business letters for tough situations
- E-mail etiquette
- To apply these skills in real work applications.

Introductions, learning objectives and Pre-workshop assignment

Clear, Concise, Complete, Correct

Guidelines for Effective Business Writing

Readability Index

Business letter format

Style

-Personal style

-Persona

Sentence and paragraph construction

Point sentences

Developing paragraphs

Simple to complex

Improve coherence

Types of business letters

How to Write a "Yes" Letter

How to Write a "No" Letter

How to Write a "Please Do Something" Letter

Business letter jargon

E-mail

Better Business Writing Exercises (Use as needed) Review

& Evaluations (1/4 hour)

## Anger Management - Understanding Anger

---

**OVERVIEW:** High self-awareness is a key element for managing your own anger, because the use of anger management skills presupposes that you know when you are angry and recognize that anger as a cue that something is wrong.

However, anger is a learned response, and the anger response can be unlearned, with commitment and effort. There is nothing wrong with occasional, moderate anger. It creates no lasting harm. But chronic, sustained anger can be harmful to both you and those around you.

Many of us are alarmed at how anger is controlling our lives. This workshop is all about acquiring, in a step-by-step format, the skills you need to better manage anger--your own anger, or the outbursts of your employees, or the anger a client might unleash.

### **WORKSHOP LEARNING OBJECTIVES:**

At the conclusion of this workshop, participants will:

Be better able to recognize how anger affects our bodies, our minds and our behaviour.

Be better able to use the six-step method to break old patterns and replace them with a model for assertive anger.

Be better able to control your own emotions when faced with other peoples' anger

Be better able to identify ways to help other people safely manage some of their repressed or expressed anger.

Pre-assignment: Participants will be asked to keep an anger log for one week (7 days) prior to the workshop, detailing any anger you may experience, as well as the anger of others with whom you interact

### **WORKSHOP OUTLINE:**

Introductions, objectives and agenda

Discussion of pre-assignment

How Anger Affects Our Bodies and Our Minds

- Anger and our bodies

- Anger and our minds

- Anger and our behaviour

- Personal anger patterns

Managing Our Own Anger

- Challenge and change your attitudes

What's underneath the anger?

Learn to Express Feelings Appropriately

- Develop your anger management communication skills

- Listening and asking questions

- Positive intent

- Assertiveness

- Negotiation skills

- Praise

Strategies for Preventing a Build-up of Frustration

- Dealing with issues

- Setting limits

Dealing with criticism

Coping thoughts





How to Keep Calm when Faced with Outbursts.  
Facing anger  
The aftermath of anger

Assessing Your Anger Management Knowledge-A Case Study

Review and Personal Action Plan Evaluations

## Appraising Performance:

---

**COURSE LENGTH:** One day of training.

**COURSE DESCRIPTION:** Appraising Performance provides an overview of the basics of conducting performance appraisals. It provides guidelines and best practices for evaluating and improving the work performance of employees, thereby increasing quality and productivity.

**PREREQUISITES:** There are no prerequisites for this course.

**DELIVERY METHOD:** This course is designed for instructor-led, group paced classroom-delivery, providing students with structured hands-on activities.

### HARDWARE/SOFTWARE REQUIREMENTS

An overhead projector  
A whiteboard projection screen and markers  
A flip chart and markers  
Microsoft Word 2000

### PERFORMANCE-BASED OBJECTIVES

Establish performance expectations so that desired work results are achieved in accordance with the organization's values and quality standards.

Write a performance appraisal so that it reflects an objective evaluation of the individual's work performance.

Prepare for a performance appraisal discussion so that there are no barriers for an effective discussion. Conduct a performance appraisal so that mutual understanding and cooperation is achieved and a realistic development plan to improve future performance is prepared.

Follow up on a performance appraisal so that future performance meets expectations.

### COURSE CONTENT

#### *Lesson 1: Establishing Performance Expectations*

Topic 1A: Appraise Performance  
Topic 1B: Manage Performance  
Topic 1C: Establish Performance Expectations

#### *Lesson 2: Writing a Performance Appraisal*

Topic 2A: Avoid Common Performance Rating Errors  
Topic 2B: Gather Appraisal Information  
Topic 2C: Rate Performance  
Topic 2D: Ensure Legal Compliance

#### *Lesson 3: Preparing for the Appraisal Discussion*

Topic 3A: Prepare the Individual  
Topic 3B: Arrange the Logistics  
Topic 3C: Prepare Yourself

#### *Lesson 4: Conducting the Performance Appraisal Discussion*

Topic 4A: Discuss Your Ratings and Comments  
Topic 4B: Resolve Performance Problems  
Topic 4C: Cope with Discussion Difficulties  
Topic 4D: Plan for the Future

#### *Lesson 5: Following Up*



Topic 5A: Evaluate the Effectiveness of the Appraisal Discussion  
Topic 5B: Communicate Frequently  
Topic 5C: Provide Ongoing Feedback and Coaching

Appendix A: Works Cited References  
and Works Cited Topic

## Effective Time Management

---

**COURSE LENGTH:** 1.0 day(s)

**COURSE DESCRIPTION:** Time is a form of currency, and the ways that we talk about it illustrate its value: we say “Time is money,” and “My time was well spent,” or “It’s a waste of time.” Like most professionals, you’ve probably struggled with managing this resource effectively. In this course, you will practice techniques that will help you achieve more effective use of your time so that you can direct your energy towards the activities that will further your professional and personal goals.

**COURSE OBJECTIVE:** You will identify effective time-management strategies, including defining personal and professional goals, establishing priorities, and identifying the tasks that will be critical to achieving those goals. You will create a personal time-management action plan.

**TARGET STUDENT:** Professionals in a variety of fields who are seeking improved time-management skills so that they can perform more effectively.

**PREREQUISITES:** There are no prerequisites for this course.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### PERFORMANCE-BASED OBJECTIVES

Upon successful completion of this course, students will be able to: articulate your goals. analyze how you are currently allocating your most precious resources: energy and time. identify elements of your personal work style that contribute to your effective use of time. assemble a collection of time-management tools and strategies that you can use to take control of your time. create an action plan for your time-management process and identify ways to evaluate and improve your efforts.

### COURSE CONTENT

#### *Lesson 1: Defining Goals*

- Topic 1A: Define Time Management
- Topic 1B: Describe Your Dreams
- Topic 1C: Identify Regrets
- Topic 1D: Articulate Goals

#### *Lesson 2: Analyzing Energy Allocation*

- Topic 2A: Identify How Energy Is Spent
- Topic 2B: Analyze Tasks
- Topic 2C: Analyze Time Usage
- Topic 2D: Analyze Energy Flow

#### *Lesson 3: Identifying Personal Style*

- Topic 3A: Review a Successful Day or Project
- Topic 3B: Analyze Your Preferences
- Topic 3C: Identify Personal Strengths
- Topic 3D: Identify Personal Motivators
- Topic 3E: Reduce Time Wasters

#### *Lesson 4: Assembling the Toolbox*

- Topic 4A: Negotiate for Success
- Topic 4B: Delegate Tasks
- Topic 4C: Choose Tools that Work for You



*Lesson 5: Creating an Action Plan*

Topic 5A: Create the Action Plan

Topic 5B: Evaluate the Time-Management Process

## Budgets And Managing Money

---

**COURSE LENGTH:** 2.0 day(s)

**OVERVIEW:** For managers in today's business world, it's essential to have a working knowledge of finance. We all play a role in our organization's finances, whether we realize it or not. For those who don't have training or a background in finances, you may be at a disadvantage as you sit around the management table. Understanding the cycle of finance will help you figure out where you fit into your company's financial structure. This workshop will familiarize you with the key concepts of finance and accounting and help you prepare budgets with more confidence.

### LEARNING OBJECTIVES:

- At the conclusion of this workshop, you should be able to assess the financial performance and health of your firm
- Enhance your decision-making skills by integrating financial management concepts into your thinking
- Understand the budgeting process and forecasting techniques
- Manage your own budget, inventory and petty cash

### Pre-Assignment

Complete a case study provided by Professional Advantage

### Workshop Outline:

Introductions, learning objectives and agenda

Pre-assignment—A case study

Understanding Accounting and Finance

Getting to know the language of accounting

Getting to know the players

The cycle of finance

Assets, liabilities and net worth

Accounts payable and receivable

Collections

Review

Reconnect

Creating a Paper Trail

Managing Accounts Receivable

Understanding Financial Statements

Basics of double entry bookkeeping

Debit and credit accounts

Understanding balance sheets, statement of earnings and retained earnings

Budgeting and Forecasting Techniques

Forecasting techniques

Capital budgets, operating budgets

Zero-based budgeting

Flexible and fixed costs

Supporting budget items

Preparing budgets

Review

Reconnect

Comparing Software Applications

Managing Your Own Budget

Internal controls and self-checking procedures

Spotting trouble early

Making budget adjustments



Review and Personal Action Plan  
Evaluations

# Building Better Teams

Working as a Team

**COURSE LENGTH:** 1.0 day(s)

**Overview:** This workshop is a basic course for team leaders and members, designed to focus on the characteristics of an effective team player and the elements of an effective team. You will leave this program with a plan for your personal development as a team player and as a team leader, as well as with some ideas on how to improve your 'at work' team.

## Workshop Learning Objectives:

- At the conclusion of this workshop, participants will:
- Understand the value of working as a team
- Recognize the critical role their communication skills will play in maintaining a team atmosphere
- Identify ways to participate and lead in a team setting
- Develop and practice techniques for handling counterproductive team behavior
- Provide an opportunity for team members to get to know one another, to enhance respect and to develop team spirit

**Pre-Assignment:** Participants will receive a reading from the book "Team Players and Teamwork" to read prior to the session.

Workshop Outline:

Introductions, Personal Objectives and Agenda

What is a team?

Setting ground rules of discussion

Pre-assignment:

Challenges the team faces

Areas that may require personal and group changes

What is the value of cultivating a sense of team?

Recognize the advantages and disadvantages

Identify steps for overcoming the disadvantages

The Parker Team Player Survey

Interpretation of the Results

The four team player styles interpreted and verified

Team player style and team success

Communication style and problem-solving skills

Roles within the team

Building sustainable agreements

What makes sustainable agreements?

Building a shared framework of understanding

Identifying challenges and change







# Change And How To Deal With It

**COURSE LENGTH:** 1.0 day(s)

## **Learning Objectives:**

At the completion of this workshop, you will:

- Accept there are no normal or abnormal ways of reacting to change, but that we must start from where we are.
- See change not as something to be feared and resisted but as an essential element of the world to be accepted.
- Understand that adapting to change is not technical but attitudinal. Change is not an intellectual issue but one that strikes at who you are.
- Recognize that before we can embrace the way things will be, we must go through a process of grieving, and of letting go of the “way things use to be.”
- See change as an opportunity for self-motivation and innovation.
- Identify strategies for helping change be accepted and implemented in the workplace.

## **Course Outline:**

- Learning Objectives
- The Change Process
- The Change Cycle
- The Three stages Of Personal Change
- Who Moved My Cheese
- The Pace of Change
- The Pyramid Response to Change
- The Four Room Apartment Strategy
- Controlling Change
- Resistance to Change
- Strategies for Dealing with Change
- Stress Management Techniques
- Some Fact About Attitudes
- Debrief of Workshop □ Suggested Reading List



## Change Management For Employees

---

**COURSE LENGTH:** 0.5 day(s)

**COURSE DESCRIPTION:** Everyone who works in the business world today is faced with constant changes and is expected to adapt. In this course, students will identify methods for solving problems resulting from workplace changes. Students will define change management and identify strategies for effectively preparing for change, coping with reaction to change, and becoming an agent of change in their working lives.

**COURSE OBJECTIVE:** You will identify ways to solve problems related to change on the job, including recognizing, anticipating, and effectively managing change. You will also define change management, identify change-management strategies, define the psychological process of moving through change, identify ways of preparing for change, and explore ways to embrace change on an ongoing basis.

**TARGET STUDENT:** This course is for any professional who is experiencing or anticipating change within the work environment.

**PREREQUISITES:** None.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### PERFORMANCE-BASED OBJECTIVES

Upon successful completion of this course, students will be able to:  
describe change in the workplace, and effective strategies for change management. define the POISS Model of change analysis, and identify the steps of analyzing change. define anticipating and embracing change, and identify best practices for both.

### COURSE CONTENT

#### *Lesson 1: Understanding Change*

Topic 1A: Assess Your Reaction to Change  
Topic 1B: Cope with Stress  
Topic 1C: Cope with Fear  
Topic 1D: Conduct Informational Interviews

#### *Lesson 2: Analyzing Change*

Topic 2A: Conduct a Change Analysis  
Topic 2B: Study the Competition

#### *Lesson 3: Embracing Change*

Topic 3A: Anticipate Change  
Topic 3B: Identify Best Practices for Reframing Change  
Topic 3C: Identify Best Practices for Embracing Change

## Change Management For Managers

**COURSE LENGTH:** 0.5 day(s)

**COURSE DESCRIPTION:** With constantly shifting global economies and technological developments, businesses are constantly changing to exploit opportunities. Companies no longer have the luxury of remaining the same. Therefore, managers must constantly prepare for and implement change, guiding their employees through periods of transition.

**COURSE OBJECTIVE:** You will implement and manage change.

**TARGET STUDENT:** This course is intended for middle management, especially those with direct reports, who are responsible for managing organizational change and maintaining employee performance.

**PREREQUISITES:** There are no prerequisites for this course.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### PERFORMANCE-BASED OBJECTIVES

Upon successful completion of this course, students will be able to:  
plan for change. learn to communicate change. manage the  
impact of change on your team members. successfully implement  
changes at work.

### COURSE CONTENT

#### *Lesson 1: Planning for Change*

Topic 1A: Analyze the Process of Change

Topic 1B: Identify Barriers to Change

Topic 1C: Determine Available Support

#### *Lesson 2: Communicating Change*

Topic 2A: Utilize Adopters of Change

Topic 2B: Communicate Change

#### *Lesson 3: Managing the Initial Impact of Change*

Topic 3A: Educate Employees on the Change Process

Topic 3B: Implement Strategies to Deal with Stress

Topic 3C: Cope with Fear

#### *Lesson 4: Implementing Change*

Topic 4A: Engage Employees

Topic 4B: Capitalize on the Change Process

Topic 4C: Maximize the Benefits of Change

Topic 4D: Reframe Change

Topic 4E: Label Milestones

Topic 4F: Troubleshoot Issues Topic

4G: Report Results

## Communicating Across Cultures



**COURSE LENGTH:** 0.5 day(s)

### **COURSE DESCRIPTION**

Increasingly, businesses around the world have become more interconnected, and companies have to think more globally in order to succeed. Despite economic ties with foreign nations, countries can be ill-prepared for doing business abroad, lacking the knowledge and sensitivity to adjust their business behavior to different cultural contexts. This course will provide you with strategies to communicate effectively across cultures.

**COURSE OBJECTIVE:** You will communicate and conduct business effectively across cultures.

**TARGET STUDENT:** This course is for individuals who need to communicate clearly and effectively while conducting business in cultures other than their own.

**PREREQUISITES:** There are no prerequisites for this course. You may find the following Professional Advantage courses beneficial: Negotiating Skills  
Managing Conflict

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to: examine differences between cultures, identify methods of communicating effectively and appropriately with people from different cultures, and describe cultural differences in business protocol. identify methods for creating high-performing, cross-cultural teams, describe strategies for conducting successful multicultural negotiations, and explore ways of effectively resolving conflict in other cultures.

### **COURSE CONTENT**

#### *Lesson 1: Communicating Across Cultures*

Topic 1A: Recognize Cultural Differences

Topic 1B: Communicate in Other Cultures

Topic 1C: Follow Business Protocol in Other Cultures

#### *Lesson 2: Working with Other Cultures*

Topic 2A: Work in Teams in Other Cultures

Topic 2B: Negotiate in Other Cultures

Topic 2C: Resolve Conflict in Other Cultures

## Communication Strategies

**COURSE LENGTH:** 1.0 day(s)

**Overview:** This workshop is designed to help you improve your interactions with other people in your workplace or at home. This workshop gives participants the opportunity to improve the critical communication skills of listening, asking questions and being aware of nonverbal messages. This workshop can also help participants who are struggling to find that middle ground between being too aggressive and too passive, and how to counter the manipulative tactics of difficult people. Participants also learn more about the six elements of our communication with others that help us reveal appropriate information about ourselves, and get a handle on how to better manage ourselves for a professional image.

### Learning Objectives:

Identify common communication problems that may be holding you back.  
Develop skills in asking questions that give you information you need  
Learn what your non-verbal messages are telling others  
Develop skills in listening actively and empathetically to others  
Learn how to firmly stand your ground and make your feelings heard Enhance  
your ability to handle difficult situations without being manipulated Be more  
aware of six critical elements of our communication with others.

### Workshop Outline and Methodology

Facilitators use a variety of training methods for each workshop, including large group discussions, individual work and reflection, small group discussions and exercises, case studies and simulations for role play. Videos that are applicable will form a part of some workshops.

Customization will be based on information provided by the organization or the individual department prior to the workshop. These will be interactive workshops with a 40/60 split between concept/theory and practical application of skills discussed. Class size should be kept under 20, whenever possible, so each participant will have the opportunity to gain techniques for the types of situations they deal with or expect to deal with.

Introductions    Learning Objectives and Agenda  
Pre-assignment  
What's In This for Me?  
Ten Commandments of Human Relations

Defining Good Communication  
What Are the Characteristics of a Good Communicator?  
The Communication Process  
Windows and Barriers

Questioning Techniques  
Closed Questions  
When they are used  
The assumptions that result  
Open Questions  
The different types  
When they are used  
Probing Skills

Listening Techniques  
Barriers to Effective Listening  
Active Listening Techniques  
Listening Guidelines



Six Elements of Our Communication with Others

Frame of Reference

- Self-disclosure
- Image
- Self-Impression Management
- Attending
- Observing
- Frame of Reference

Review

Reconnect (A short exercise to get feedback from to focus on communication skills that impact interpersonal relationships)

Five Approaches to Interpersonal Relationships

- Mystery-Mastery
- Structural
- Sympathy-Supportive
- Empathy-Collaboration
- Mutual-Confrontive

Assertiveness

- Dealing with Difficult People

The Difference between Assertive, Passive and Aggressive

- The Four-step Response
- Learning How to Say “No”

Persuading Others

- First Persuading Yourself
- Techniques for Persuading Others

Managing Stress

Personal Action Plan

## Conducting Effective Performance Reviews

**COURSE LENGTH:** 1.0 day(s)

Research has shown that organizations that conduct performance reviews are more successful than those who do not have a system in place. The first step in a basic system is to develop standards of performance that all employees can understand and agree to.

Setting performance objectives to aim for will give supervisors and employees a like focus, and targets to aim for. Supervisors must also learn how to coach and give feedback, both positive and negative, on a regular and timely basis so that employees can grow and develop. Defensible performance reviews are the cumulating of all these activities.

### Learning Objectives:

At the conclusion of this workshop, you will:

- Recognize the importance of having a performance review process for employees
- Demonstrate an understanding of core competencies and how to work with a core competency model
- Identify the performance management cycle, and the part employees, managers and organizations play in that cycle.
- Understand how to work with employees to set performance objectives and standards
- Develop skills in observing and giving feedback, listening and asking questions, for effective coaching and improved performance.
- Identify an effective interview process and have the opportunity to practice the process in a supportive atmosphere.
- Make the performance review legally defensible.

### Workshop Outline:

Learning Objectives, Personal Objectives and Agenda (The workshop begins with introductions through a large group exercise, followed by a small group exercise to identify objectives and energize the group-3/4 hour)

Pre-workshop assignment

The Importance of Performance Reviews (Participants are asked to work in small groups to identify how performance reviews are important to each of three stakeholders. Responses are posted on flip chart paper for debriefing and feedback-3/4 hour)

For employees—their role

For supervisors—their role

For organizations—their role

Defining Expectations and Consequences (Large group discussion about when new employees learn what is expected of them and what the consequences are when expectations are not met. This is followed by role plays with participants working in trios, with one explaining, one receiving and one observing –3/4 hour)

Developing standards and objectives (This is a very hands-on segment of the workshop. Participants look at sample job descriptions, performance standards and competencies, and compare these to the ones they are using, for benchmarking-1 hour)

Appraisal Tools

Job descriptions

Performance standards

Goals and objectives

Competencies

Documentation





Documentation Processes  
When and how to document

Appraisal Forms (This is a second very hands-on segment, with participants working in small teams to compare and contract four sample appraisal/review forms, and develop some guidelines for effective forms-3/4 hour)

Pre-appraisal  
Appraisal

(Participants begin the afternoon by learning how to tie a tie or make a paper airplane. They go from this experience to developing some guidelines for effective training—for both the learner and the trainer. Facilitator then leads the group in a discussion of adult learning and learning styles, as points to remember when training and coaching-1 hour)

Coaching for Improved Performance  
On-the-job training  
Follow up

Giving Performance Feedback (Participants take part in a team exercise to demonstrate the differing types of feedback. The exercise is debriefed and some guidelines are developed-1 hour)

Praise and positive feedback (Individuals then role play giving positive and negative feedback to an employee, and the group discuss how important it is to get feedback from others and how to accept feedback that is not positive-1 hour)

Criticism and negative feedback  
Accepting feedback from others

Review (Participants cover the issues raised during the day. They are given an overnight assignment to think about how they will prepare for and conduct an interview on the second day 1/2 hour)

Reconnect (Participants are asked to take part in a small group exercise to focus on the day's activities and provide feedback on day one-1/2 hour)

Planning the Interview Process (Large group discussion about when and how to conduct interviews or performance reviews, and the preferred format for conducting them. They discuss what they as managers should do before the review to prepare, what they can do during the review to ensure it goes smoothly, and what they should do after the review to follow-up 1 hour)

Organizing the interview  
Where and when

Developing an Interview Format  
The opening  
The discussion  
The commitment  
The closing

The appraisal as a two-way process

(They then work in small teams to prepare for their own role play as an employee, manager and observer in an employee review-1 hour)

(Role plays in teams of three. If time permits, ask one group to demonstrate their review-1 hour-1 ½ hours)

(A re-energizing after lunch exercise-1/4 hour)



Managing Employee Performance (A large group discussion of ways to maintain good performance and improve problem performance, followed by having small groups develop suggested solutions for a series of problems that plague managers, about both good, poor and average performers-1 ½ hours)

Maintaining exceptional performance

Developing average performers

Dealing with problem performance

(Participants conduct a round robin conference with their colleagues in small groups, to discuss some of the additional and real problems they are facing-1 hour)

Conducting Exit Interviews (1/2 hour)

Review (1/2 hour using one of several game show options)

Personal Action Plans (1/4 hour)

## Creative Problem Solving – E.I.N.S.T.E.I.N.

### LEARNING OBJECTIVES{ XE "LEARNING OBJECTIVES" }

Challenges and opportunities appear constantly in today's workplaces; these situations have the potential to expend and creatively release human energy. The skills and processes taught in Creative Problem Solving direct that energy towards positive outcomes. This course will teach the fundamentals of problem solving skills – from defining the problem, identifying and implementing solutions, and gaining buy-in from key decision makers in the organization.

#### IN THIS COURSE YOU WILL:

- ✓ Understand processes for solving problems logically.
- ✓ Define the true issue of a problem or nature of an opportunity.
- ✓ Apply methods for solving problems systematically.
- ✓ Examine strategies for acquiring decision acceptance when problem solving .
- ✓ Understand personal and organizational barriers to creativity.
- ✓ Become familiar with problem solving tools, i.e. brainstorming, mind mapping, root cause analysis.

#### YOU'LL BENEFIT BY LEARNING TO:

- ✓ Increase problem solving capacity.
- ✓ Increase creative energy and prudent risk taking.
- ✓ Distinguish root causes from symptoms to identify the right solution for the right problem.
- ✓ Improve your response to challenges and increase the timeliness of your response.

### The E.I.N.S.T.E.I.N. Problem Solving Method

#### Lesson 1 – INTRODUCTION

- Self Assessment – Ascertaining Your Problem Solving Style
- Defining “Problem”
- Factors affecting Initiative and Accountability
- Converge <> Diverge: creating problem solving Ground Rules

#### Lesson 2 – DEFINE the PROBLEM □

- (step 1) E.valuate The “Problem”
  - Root Cause Analysis (RCA) Process Description
  - Cause and Effect Diagram
  - The Mind Mapping Process
- (step 2) I.nvestigate Potential Solutions
  - Methods to Generate Potential Solutions
  - Brainstorming Warm-Up
- (step 3) N.arrow the Focus
  - Multi-Voting
  - Develop Workable Solutions using Pluses, Potentials and Concerns

#### Lesson 3 – IMPLEMENT the SOLUTION

- (step 4) S.olve the Problem □ (step 5) T.est the Solution

#### Lesson 4 – FOLLOW THROUGH

- (step 6) E.valuate the Result
- (step 7) I.mprove the Solution
- (step 8) N.ominate and Celebrate



## Conflict Resolution - Dealing With Difficult People

---

**COURSE LENGTH:** 1.0 day(s)

**Overview:** Edward Deming, the father of quality management, has said that people can face almost any problem except the problem of people. They can work long hours, face declining business, even the loss of a job, but they can't deal with the difficult people in their lives. This workshop will help you identify some of the ways you may be contributing to these problems and give you some strategies you can adopt, at work and in your personal life as well.

### Workshop Learning Objectives:

At the conclusion of this workshop, participants will be expected to:

- Recognize how their own attitudes and actions impact on others
- Find new and effective techniques for managing negative emotions
- Develop coping strategies for dealing with difficult people and difficult situations
- Identify those times when they have the right to walk away from a difficult situation

### Pre-Workshop Activity

Participants will be asked to complete "SELF – A Profile of Interpersonal Interactions" and bring it to the workshop with them.

### Workshop Agenda

Introductions, Objectives and Agenda Discussion  
of Self-Assessment

Could You Be Part of the Problem?  
How Can You Work Toward Different Solutions?

The Importance of Good Communication

Choosing the Right Words  
Asking Questions  
Listening for Answers  
Non-Verbal Messages

Managing Anger

Understanding more about anger

Managing your own anger      Dealing  
with other people's anger  
Preventative strategies

Dealing with Difficult Situations

Conquering resistance  
Recognizing potential difficulties

Difficult People: The Classic Types

Specific causes of difficult behavior  
Weapons difficult people use  
Coping strategies for difficult behaviors

Formula for Changing Attitudes of Difficult People

Change your behavior to change the interaction

Negative interaction cycles

Positive interaction cycles

Permanent disassociation

How to Overcome the Feelings Difficult People Give You

Put yourself in charge of you

De-stress Options

Personal Action Plan



## Customer Service Skills

---

**COURSE LENGTH:** 0.5 day(s)

### **COURSE DESCRIPTION**

You need to respond to customer service queries via a remote system such as email or the telephone. In order to do this effectively, you need to develop skills that will help you interact with customers in a positive and professional manner. In this course, you will learn important principles and skills you can utilize as a remote customer service representative.

**COURSE OBJECTIVE:** You will practice skills and apply principles for providing customer service remotely, via telephone and the web.

**TARGET STUDENT:** New employees in a telephone or electronic-based customer service role in any industry, or current employees in this role in need of developing these skills.

**PREREQUISITES:** Written communication and typing skills; familiarity with telephone, email, and web-based communication tools.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to: manage the customer's initial contact. address the customer's issues. close communications with the customer once all issues have been resolved.

### **COURSE CONTENT**

#### *Lesson 1: Managing the Customer's Initial Contact*

Topic 1A: Accept a Customer Contact

Topic 1B: Address a Customer's Emotional State

Topic 1C: Address Your Own Emotional State

#### *Lesson 2: Addressing Customer Issues*

Topic 2A: Assess Customer Issues

Topic 2B: Develop Solutions

Topic 2C: Negotiate to Reach a Solution

#### *Lesson 3: Closing Communications*

Topic 3A: Upsell Additional Products

Topic 3B: Conclude Customer Contact

Topic 3C: Follow Up

Topic 3D: Release Stress

## Customer Service Training - Critical Elements of Customer Service

---

**COURSE LENGTH:** 1.0 day(s)

**COURSE DESCRIPTION:** This one day workshop is for any employee who deals with the public or who serves those who do deal with the public. Customer service skills can increase your value to your company and advance your career at the same time.

**COURSE CONTENT:**

- Introductions
- Learning Objective
- Defining Customer Service
- Meeting Expectations
- Setting Goals & Targets
- Communication Skills for Excellent Customer Service
- Fundamental Techniques for Handling People
- Turning Complaints into Opportunities
- Two Key Tools for Dealing with Difficult People
- The Problem Solving Process
- Seven Steps to Customer Problem Solving
- Resolving Conflict
- Service Pride is a Team Effort
- De-stress Options You Can Use Right Now
- A Personal Action Plan





## Customer Service Training - Managing Customer Service

---

**COURSE LENGTH:** 1.0 day(s)

Customer Service: Leading a Customer Focused Team

**Overview:** The need for leading, promoting and enhancing a customer focused culture are essential within government. The need for leading, promoting and enhancing a customer focused culture are essential within government departments. This workshop will help managers/ leaders create customer satisfaction in whatever business units they work within.

### Learning Objectives:

- Identify ways to establish the links between excellence in customer service and business practices, and policies.
- Develop the skills and practices that are essential elements of quality customer service.
- Recognize who the customers are and what they are looking for
- Develop strategies for creating customer satisfaction in whatever business units they work within.

### Workshop Outline and Methodology:

Introductions, Learning Objectives and Agenda

Current Facts About the 21st Century Customer

Consumer Diversity and Changing Expectations

Customers are both Internal and External

Leading Customer Focused Teams is About Communication

Characteristics of a Good Communicator

The Art of Asking Questions and Listening

Elements of Our Communication with Others

Self-disclosure, Image, Self-Impression Management, Attending, Observing, Frame of Reference Dealing with Difficult People and Situations

Managing the Customer Expectations through Effective Leadership

Leadership - What it is and is not

Personal assessment of style, strengths and weaknesses

Adapting our leadership style to suit the situation

Situational Leadership & follower readiness

Concepts of leadership - managing, leading and coaching

Honing both leader and team skills

Characteristics of an Effective Team

Problem Solving and Decision Making Essentials

Basic team tools for improving business practices

Team Cohesiveness

Impact, Implications, Getting To a Higher Level

Selling ideas -- Presenting the Results

Now What??-Action Plans

# Delegation - The Art Of Delegating Effectively

---

Delegation the Magic of Involvement

**Pre-Assignment:** A Case Study: Margaret

**Learning Objectives:**

At the conclusion of this workshop, participants will be expected to:

- Clearly identify how delegation fits into your job and how it can make you more successful.
- Identify opportunities within the scope of your authority for delegating effectively to others.
- Identify the criteria for fair and responsible delegation to all employees
- Develop a technique for defining expectations
- Recognize common delegation pitfalls and how to avoid them.
- Provide opportunities to test your delegation skills.

**Curriculum Outline:**

Introductions/Objectives/Agenda

Advantages and Disadvantages of Delegation

Self-Assessment

Definitions

When and How to Share the Load

Pre-Assign: Case Study

When to Delegate and When to Do It Yourself

Picking the Right Person for the Job

The Delegation Meeting

Defining Expectations

Describing the End Result and the Measures

Directing the Performer

Turning a Task into a Challenge

Communication Skills

Check for Understanding

Uncover Concerns

Potential Delegation Problems

Monitoring Delegation

Case Study

Characteristics of an Effective Delegator

Delegation Checklist

Review

Personal Action Plan



## Emotional Intelligence for Managers

---

**COURSE DESCRIPTION:** In this course, you will assess your current emotional intelligence capabilities, determine your strengths, and identify areas for improvement. You will examine how emotions affect behavior and how those behaviors impact your relationships with others. You will also develop strategies for managing the emotional energy in yourself and others.

**COURSE OBJECTIVE:** You will evaluate your current emotional intelligence abilities and apply strategies to improve your emotional intelligence.

**TARGET STUDENT:** This course is designed for the emerging manager or mid-level manager.

**PREREQUISITES:** Prior to beginning this course, you should have experience in managing people.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

**PERFORMANCE-BASED OBJECTIVES:** Upon successful completion of this course, students will be able to:

- evaluate your emotional intelligence.
- develop strategies for effectively applying emotional intelligence in the workplace.

### COURSE CONTENT

*Lesson 1: Evaluating Emotional Intelligence*

Topic 1A: Assess Your Self-Understanding

Topic 1B: Determine Your Ability to Regulate Your Emotions

Topic 1C: Evaluate Your Social Recognition Skills

Topic 1D: Assess Your Social Regulation Skills

*Lesson 2: Applying Emotional Intelligence In A Business Environment*

Topic 2A: Improve Your Emotional Intelligence By Understanding Your Emotions

Topic 2B: Regulate Your Emotions

Topic 2C: Improve Your Social Recognition and Regulation Skills

2D: Build An Emotionally Intelligent Team

## Effective Presentations

---

**COURSE DESCRIPTION:** Without a dynamic and coherent presentation, even stellar ideas can fail to convince your audience. In this course, you will learn active listening skills to facilitate the exchange of ideas in meetings and presentations. You will also organize your ideas to create coherent and convincing oral presentations, while also utilizing available visual aids and using public-speaking techniques to strengthen your delivery. You will also prepare strategies for business meetings and learn to conduct meetings efficiently.

**COURSE OBJECTIVE:** You will effectively participate in and conduct meetings, as well as deliver professional presentations.

**TARGET STUDENT:** This course is designed for individuals who need to present information effectively in a professional environment.

**PREREQUISITES:** To ensure your success, we recommend you first take the following Professional Advantage courses or have equivalent knowledge:

Business Writing: From Email to Business Proposals

Grammar Essentials

Microsoft Office Word 2003: Levels 1, 2, and 3

Microsoft Office Outlook 2003: Levels 1, 2, and 3

Delivery Method: Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### PERFORMANCE-BASED OBJECTIVES

Upon successful completion of this course, students will be able to: listen in an active, engaged manner and take good notes. participate in, organize, and conduct a meeting. organize, write, and deliver a professional presentation.

### COURSE CONTENT

*Lesson 1: Listening and Taking Notes*

Topic 1A: Listen Effectively

Topic 1B: Take Good Notes

*Lesson 2: Participating in and Conducting a Meeting*

Topic 2A: Participate in a Meeting

Topic 2B: Decide to Meet

Topic 2C: Prepare for a Meeting

Topic 2D: Run a Meeting

Topic 2E: Conduct an Online Meeting

*Lesson 3: Delivering Presentations* Topic

3A: Organize Material

Topic 3B: Write a Presentation

Topic 3C: Prepare Visuals

Topic 3D: Deliver a Presentation Topic

3E: Respond to Questions



## Excellence in Technical Customer Service

---

### **COURSE DESCRIPTION:**

As a provider of customer service in a technical field, you need to interact with customers to address their technical concerns. To do this effectively, you need to develop skills that will help you interact with customers in a positive and professional manner. In this course, you will apply important principles and skills you can use as a technical customer service representative.

### **COURSE OBJECTIVE:**

You will practice skills and apply principles for providing face-to-face customer service to customers with technical issues.

### **TARGET STUDENT:**

Customer service professionals providing technical support or service, on-site or by way of call center or email.

### **DELIVERY METHOD:**

Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:

- meet the customer and/or colleague.
- diagnose the customer's issue.
- deliver solutions.

### **COURSE CONTENT**

#### *Lesson 1: Meeting the Customer Topic*

1A: Be a "People Person"

Topic 1B: Represent Your Company and/or Department

Topic 1C: Relate to the Customer and/or colleague

#### *Lesson 2: Diagnosing Issues*

Topic 2A: Deal with a Customer/Colleague's Misrepresentations

Topic 2B: Determine the Customer/Colleague 's Need

Topic 2C: Troubleshoot the Customer/Colleague 's Problem

#### *Lesson 3: Delivering Solutions*

Topic 3A: Finalize the Solution

Topic 3B: Educate the Customer/Colleague

Topic 3C: Deliver Bad News

Topic 3D: Achieve Performance Standards

Topic 3E: Close the Contact

## Facilitation & Presentation Skills

---

**COURSE LENGTH:** 0.5 day(s)

This high energy training will draw upon multi-disciplinary themes such as: Public Speaking, Motivation of Employees, Conflict Management, Train-The-Trainer, Emotional Intelligence, and others. As such, we will define facilitation broadly and you will find this training useful in both personal and professional roles including delivering speeches, training, dealing with conflict, and influencing others.

The purpose of this course is to provide you with the knowledge and skills needed to successfully navigate facilitation. Through practice and experience, the skills you develop from this program will increase the effectiveness of your presentations, facilitation, and communications in general. Facilitation is most effective when people become involved and participate in the presentation. Along with Adult Learning Principles, you will learn four facilitation skills; Attending, Observing, Listening, and Questioning. Also, you will discover your own Learning Style (Visual, Auditory, Kinesthetic) and consider how this knowledge affects your personal communication approach.

### **COURSE OUTLINE:**

#### *Adult Learning Principles*

Identify the factors that can affect adult learning (ALPS).

Identify ways to promote motivation.

Identify personal learning preferences and their implication to facilitation (VAK).

Identify the four basic facilitation skills (AOLQ)

Communications Exercise

Gagne's Nine Events of Instruction

Adult Learning Principles' Methods

#### *Adult Learning Styles: V.A.K.*

Visual Learners

Auditory Learners

Kinesthetic Learners

What is your learning style? VAK Assessment

#### *Facilitation Skills*

Attend

Observe

Listen

Question

#### *Facilitation Preparation*

Day Before Delivery

Day Of Delivery

Introductions

Class Wrap-Up

Ground Rules

Discuss ground rules for workshop

#### *Presentation Skills*

Presentation Skills: Primary Elements

Presentation Skills: Public Speaking, Educating, or Training with Presentation Software



## Facilitation: Becoming A Great Trainer

---

**COURSE LENGTH:** 1.0 day(s)

**Training Format:** Instructors understand and use up-to-date training techniques and a variety of training methods, including lecturettes, group discussions, case studies, problem solving exercises, and visual aids to give all participants the best opportunities for learning.

Participants' handbooks will note key points, accommodate handouts, and provide space for individual learning. These workbooks will serve as a reference for individuals upon completion of this course.

### Workshop Learning Objectives:

- Distinguish facilitation from instruction and training.
- Provide facilitators with commonly used process tools to make their meetings easier and more productive.
- Identify the competencies linked to effective small group facilitation.
- Demonstrate through simulations, role-play, critical incidents, and other exercises, each facilitator competency.

### Pre-Workshop Assignments

Prior to the workshops, participants asked to prepare a self-assessment report identifying personal learning objectives for the training program.

### Workshop Outline

Introductions, Objectives, Agenda

Pre-assignment

The purpose of group facilitation

Assignment

Difference between “content” and “process”

Difference between “instructor” and “facilitator”

What group dynamics are really like

    Divergent thinking

    Convergent thinking

    The Groan Zone

What is a facilitator? What

is a facilitator's role?

Facilitative listening skills

    Listening skills

    Developing Questioning Techniques

        Open

        Closed

        Probes

    Observing Body Language

    Other Process Skills

Facilitating Open Discussion

Structured Activities

    Brainstorming

    Categorizing

    Debriefing

Difficult Situations & Difficult People

Preventions and Interventions

Developing Sustainable Agreements

## Surveying the Territory

---

Building a Shared Framework of Understanding

Developing Sustainable Criteria

Gradients of Agreement

Practice: Assignment

Personal Action Plan

Prepare personal action plan based on personal learning objectives. These action plans will clearly indicate how the participant plans to incorporate learning into practical application.





## Grammar Essentials

**COURSE LENGTH:** 1.0 day(s)

### COURSE DESCRIPTION

You learned the rules of grammar in school, but now you'd like to refresh and refine your grammar usage for your professional life. You need to articulate your ideas clearly and succinctly in written communications and present yourself in a professional manner. In this course, you will review the rules of grammar, identify common grammar errors, and refine your business writing style.

**COURSE OBJECTIVE:** You will identify the elements of correct grammar for use in professional writing.

**TARGET STUDENT:** Professionals who seek to improve their grammar usage for written communications.

**PREREQUISITES:** None

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### PERFORMANCE-BASED OBJECTIVES

Upon successful completion of this course, students will be able to: examine nouns, pronouns, and verbs.

Identify adjectives and adverbs.

Identify prepositions, conjunctions, and interjections.

Identify some important rules of grammar and some commonly made grammatical errors.

Identify grammar rules regarding correct punctuation.

Identify problematic sentence fragments, run-ons, and comma splices, as well as effective methods of rewriting sentences so that they are clear and complete.

Identify methods for improving word choices.

Identify methods for building effective sentences.

Identify methods for editing text effectively.

Identify methods for avoiding some common errors made by overzealous writers who create hypercorrections in their own work.

### COURSE CONTENT

*Lesson 1: Identifying Nouns, Pronouns, and Verbs*

Topic 1A: Identify Nouns

Topic 1B: Identify Pronouns

Topic 1C: Identify Verbs

*Lesson 2: Identifying Adjectives and Adverbs*

Topic 2A: Use Adjectives

Topic 2B: Use Adverbs

*Lesson 3: Identifying Prepositions, Conjunctions, and Interjections*

Topic 3A: Use Prepositions

Topic 3B: Use Conjunctions

Topic 3C: Use Interjections

*Lesson 4: Identifying Rules*

Topic 4A: Monitor Sentences

Topic 4B: Monitor Modifiers

Topic 4C: Avoid Common Errors

---

*Lesson 5: Identifying Correct Punctuation* Topic

5A: Use Parentheses Correctly

Topic 5B: Use Commas, Semicolons, and Quotation Marks

Topic 5C: Use Numbers, Symbols, and Capitalization Correctly

*Lesson 6: Identifying Sentence Fragments, Run-ons, and Comma Splices*

Topic 6A: Identify Sentence Fragments

Topic 6B: Identify Run-ons, Comma Splices, and Solutions

*Lesson 7: Improving Word Choices*

Topic 7A: Identify Commonly Misused Words

Topic 7B: Identify Synonyms, Antonyms, and Homonyms

*Lesson 8: Building Effective Sentences* Topic

8A: Identify the Goal

Topic 8B: Consider the Audience

Topic 8C: Consider the Context

*Lesson 9: Editing Effectively*

Topic 9A: Use Correct Spelling

Topic 9B: Achieve Clarity

*Lesson 10: Avoiding Hypercorrections*

Topic 10A: Avoid Hypercorrections Topic

10B: Achieve Simplicity



## Hiring Smart - Behavioral Interviewing Techniques

---

**COURSE LENGTH:** 1.5 day(s)

**Overview:** Behavior Interviewing is a very reliable and valid candidate selection technique based on the work of Tom Janz, of the University of Calgary. While we all may say that past behavior is the best indicator of future behavior, we don't act as if we believe this when we are interviewing candidates—often because we aren't certain how to ask questions that will tell us about past performance.

This workshop concentrates on the pre-interview preparation, developing questions and their value, the interview techniques that get specific, behavior-based examples of past performance, and the strategies that follow through on this process.

In addition to the work of Tom Janz, this workshop draws from the work of Stephen Jackson, who takes the behavioural interview one step further with a twelve-step process to hiring top performers.

### **What participants will learn:**

At the conclusion of this program, participants will be expected to:

- Have a process for creating competency requirements for any given position
- Understand why behavioural interviews are two to five times more accurate than traditional interviews.
- Identify and apply the principles of behaviour interviews, and performance-based selection methods.
- Recognize the pattern of behavioural questions and use this pattern to design job-specific, behavioural, performance-based questions.
- Enhance professional interviewing skills with effective communication strategies and behavioural interviews techniques
- Role play and practice using behavioural interviewing skills\*
- Develop a defensible scoring and evaluation process
- Complete the process through testing and reference checking.

Pre workshop assignment: You are able to provide participants with a reading assignment prior to taking the class. This assignment will have questions to be answered so the participants should come to the workshop prepared to discuss their thoughts.

Suggested Workshop Outline:  
Introductions/Objectives/Agenda  
Pre-assignment discussion

The Importance of Hiring the Right People  
The cost of hiring errors

Why Behavioural Interviewing?  
From the applicant's point of view  
From a team leader/manager's point of view  
From a human resource perspective  
What the research tells us about better interviewing

Before the Interview  
Gather the Pieces for the Pattern: Conduct a Job Analysis  
Recognize critical incidents  
Identify competencies and performance dimensions

- Develop job descriptions
- Prepare neutral job applications

#### Forming the Interview Questions

- Identifying the pattern
- Writing the questions
- Developing the response you are looking for

#### Consistent Resume Screening

- Defensible
- Efficient

#### Developing an Interview Format

- Develop rapport
- Structure the interview process
- Gather predictive information
- Sell your organization
- Gain a commitment
- Conclude the interview

#### Ethical and legal issues

#### Interviewing Techniques

- Create a comfortable atmosphere
- Ask open questions and probe answers
- Use active listening skills
  - Pause, clarify, summarize
  - Record applicant responses

#### Interviewer Errors to Watch Out for

- Leniency/stringency
- Error of central tendency
- Halo/horns effect
- Talking too much

#### Rating Interviews

- Rating errors and how to avoid them
- Valuing and scoring candidate responses

#### Testing

- Performance based assessments
- Other tests

#### Reference Checks

- A reference check format
- Alternatives to a formal reference check

#### Conduct Practice Interviews\*

#### Final Review



## Human Resources Training: HR For The Non HR Manager

---

**COURSE LENGTH:** 1.5 day(s)

This overview of human resource issues facing today's business owners, managers and human resource support staff. You do not always have the expertise to deal with the many employee relationship issues you face, and yet you will be expected to make decisions that are both effective and legal.

### Learning Objectives:

- The latest trends in the human resource field and the changing role of the human resource professional
- How human resource planning and the organization's strategic plan work together.
- How to write job specifications and identify core competencies
- Methods of finding, selecting and keeping the best people using behavioral description interviewing techniques.
- How to get employees off to a good start
- How to deal with compensation and benefits
- How to maintain healthy employee relations
- How to make performance appraisals a cooperative process

### The Agenda:

Introductions/objectives/agenda

Trends affecting HR

Forecasting needs/succession planning

Skills inventories/emotional intelligence

Job analysis

Job competencies

Job descriptions

Job applications

What's wrong with traditional interviews?

Guide for an objective interview

What is BDI?

How does a BDI interview rate

BDI Patterns

Critical incident techniques

Format for an interview

How to rate interviews

Testing

Checking references

Orientation programs

    Why have one?

    What should they look like?

Planning for Training

    Learning Styles

    Adult Learning Principles

Flow chart for a needs assessment

Internal vs. external training

Criteria for working with external consultants

Employee training plans

The employee handbook

Absenteeism

Advantages of performance appraisals

Pre-preparation for appraisals  
Designing the appraisal form  
Employee preparation for appraisals  
Conducting the appraisal  
Follow-up for performance appraisals  
Diversity  
Compensation equity  
Compensation issues What  
benefits do employees want?  
Positive Discipline  
Exit Interviews Certificates,  
evaluations



# Inventory Management The Nuts & Bolts Of Inventory And Warehouse Management

---

**COURSE LENGTH:** 1.0 day(s)

**INVENTORY MANAGEMENT: CONCEPTS AND PRACTICES**

1. THE CONCEPT
  - A. What is inventory?
  - B. Why is stock important?
  - C. What are our goals and objectives?
  - D. Who are our customers?
    - Internal Customers & External Customers
      - Manufacturing & Distribution
      - Public Sector
2. ASSESSING THE QUALITY AND COMPETENCY OF STAFF
  - A. Hiring for the position
  - B. Evaluation of traits affecting performance
  - C. Motivation - The people problem
3. MANUAL TO AUTOMATED SYSTEM
  - A. Learn what constitutes a good manual system
  - B. Understanding key functions and terminology
    - How to calculate "Order Quantities"
    - How to set "Reorder Points"
    - How to set "Safety Stock Levels"
    - How to factor in "Lead Times"
    - Learn formulas and practice exercise
4. DEVELOPING A STRATEGY FOR IMPROVEMENT
5. ACHIEVING AND MAINTAINING INVENTORY ACCURACY
  - A. Physical count
  - B. Cycle counts
  - C. Inventory records & reports
  - D. Bar coding
6. STOCK LOCATION MANAGEMENT
  - A. Efficient space management
  - B. Positive item identification
  - C. Conserve time, labor, & equipment
  - D. Sample locator system
  - E. Material handling equipment
7. SHIPPING AND RECEIVING OPERATIONS
  - A. The importance of these functions and how they relate to inventory shortages and customer service.

8. DEVELOPING YOUR INVENTORY MANAGEMENT STRATEGY
- A. Establish your mission statement
  - B. Identify key factors to establish goals
  - C. Set business and inventory management objectives
  - D. Set objectives for service levels





## Leadership Training - Becoming Leadership Material

---

**COURSE LENGTH:** 2.0 day(s)

Management Development 1: Leadership: Becoming Management Material

**Overview:** If you are in line for a promotion, or are moving into management in your organization, this is a first step on the road to success. Now is the time for big picture thinking and sharing your vision with your team. Learn ways to communicate clearly and openly in order to get things done. Identify your team player style and your leadership style profile, and discover ways to use this knowledge to manage more effectively. Build a relationship with your manager and develop a support system of your own. Understand how to motivate and challenge your employees by delegating and coaching for excellent performance. . In this workshop you will discover practical and innovative ways to handle your most challenging responsibilities, from managing meetings to managing your team.

### Pre-assignment:

You will be asked to complete a “Career Development Profile” and bring it to the workshop with you for in-class discussion.

### Learning Objectives:

- Define your role as a manager and identify how that role differs from other roles you have had.
- Understand the management challenge and the new functions of management
- Discover how you can prepare for and embrace the forces of change
- Identify ways to get you and your work space organized, and get a jump on the next crisis.
- Identify your leadership profile and explore ways to use this knowledge to improve your success as a manager.
- Enhance your ability to communicate with others in meetings and through presentations.
- Create an action plan for managing your career success

### Workshop Outline:

Introductions

Learning Objectives

Agenda

Discussion of pre-assignment

The Management Challenge

- The new rules of the workplace
- Building trust
- Energizing your team
- Empowering your team
- Supporting your team
- Developing personal mastery

Assignment:

Team Project

Dealing with Change

Video: Who Moved My Cheese?

Preparing for your journey of change

Enabling others to handle change

Communication

Commitment

Participation

Celebrating victories

Seven steps for breaking through organizational gridlock

#### Getting Organized

Start with your desk

Work with your planner

Set your priorities

Get a jump on the next crisis

#### Leading vs. Managing

What leaders do

Direction thinking

Consequential thinking

Communication skills

Influence strategies

What managers do

Quality vs. productivity

Principles of variation

Macro and micro managing

#### Inspiring Employees to Better Performance

The greatest management principle in the world

Creating a supportive environment

Measuring individual performance

Five steps for training high performers

Providing performance feedback

Getting feedback for your performance

#### Speaking Effectively

To get action

To inform

To convince

Introducing speakers, accepting and presenting awards

#### Conducting Effective Meetings

Your role as manager

Building the agenda

Staying on track

Getting everyone to participate

Creating a comfortable atmosphere

Facilitating open discussion

Interventions you can use

After the meeting

#### Attending Other People's Meetings

#### Managing Your Career

Building your relationship with your manager



Anticipating and initiating

Team Presentations

Review/Personal Action Plans

## Management Skills For The Administrative Assistant

---

**COURSE LENGTH:** 1.0 day(s)

**Overview:** This is a two-day workshop intended to help those in support positions understand their roles and responsibilities. They will discuss new strategies for handling their workload, through enhancing organization skills and ability to prioritize. They will also explore ways to work effectively in a team environment, by enhancing critical communication skills.

### Learning Objectives:

- Understand the importance of a professional presence on the job.
- Improve ability to organize, plan, prioritize and self-manage.
- Identify ways to problem-solve more creatively
- Improve critical communication skills such as listening actively, and asking open questions to gather information.
- Develop strategies for managing difficult situations and people

### Workshop Outline and Methodology:

Facilitators use a variety of training methods for each workshop, including large group discussions, individual work and reflection, small group discussions and exercises, case studies and simulations for role play. Videos that are applicable will form a part of some workshops.

Customization will be based on information provided by the human resource department or the individual department prior to the workshop. These will be interactive workshops with a 40/60 split between concept/theory and practical application of skills discussed. Class size should be kept under 20, whenever possible, so each participant will have the opportunity to gain techniques for the types of situations they deal with or expect to deal with.

Introductions, Learning objectives and Agenda (Introductions in a large group discussion, followed by an exercise to put everyone at ease)

Pre-assignment

Personal Best, Professional Best (Participants do an exercise based on their impressions, and then discuss “first impressions” and how wrong they can be, but how pervasive they are)

You and your self-esteem

First impressions

What your supervisor/manager values (A large group discussion about expectations and the importance of understanding your role in the organization. The discussion then moves on to organizing your workspace, and planning your work, so you can prioritize)

Your role

Planning and prioritizing

Working as a Team (The group put together a jigsaw puzzle, with the underlying message that we all have a role to play and we work interdependently as a team)

The team of two

The office team

Taking Control of Communication (The group defines communication, and identifies the barriers that must be overcome, with an exercise to illustrate how easy it is to misinterpret messages. They then determine what they can do to improve communication in their organization. ½ hour)

Barriers to communication



Questioning techniques (A large group discussion of the advantages of open questions, some examples of good open questions we can ask, how we can probe, and an exercise for finding common ground-1/2 hour)

Probing

Active Listening (An exercise, followed by a discussion of active listening techniques)

Non-verbal Communication-(An exercise to demonstrate the different ways one's body language can be interpreted)

The Written Word (This is a discussion, followed by exercises to illustrate the key elements of good written communication—the clear, concise, complete, correct formula).

The four C's of communication

Punctuation pointers

Comma faults

Spelling

Proofreading

Review

Reconnect (A group exercise to elicit feedback and focus the group on the topic)

- Dealing with Difficult People (A large group discussion about the people who annoy us and whether we might be contributing to the problem)
- Dealing with criticism (using curiosity when you meet genuine criticism and the “fogging” technique for manipulative criticism, with some opportunity to practice these techniques-1/2 hour)
- Managing other people's anger (Large group discussion of warning signs and ways to deal with the anger, followed by an exercise, completed in pairs, of ways to deal with difficult people-3/4 hour)
- Connecting with People (Discuss the acronym SOFTEN, and then the six steps suggested by Dale Carnegie for winning friends and influencing people, with two exercises to demonstrate ways to do this)

(A short exercise to get people energized after the lunch break)

Problem-solving in the Workplace (Large group discussion of the six steps to problem-solving, followed by team discussion of some of the common problems participants face in a workplace setting, and their responses, with feedback)

Stress Options you can use right now (Participants work in teams, as music plays in the background, to list those things they do to aggravate stress and those things they do to alleviate stress, and what changes they are prepared to make, so their stress is more manageable)

Review-each participant is to write down 3 characteristics of an effective support person, and through a process of exchange, elimination and consensus, the group should arrive at the top three characteristics for anyone in support to possess.

Personal Action Plan (Individual exercise)

## Managing Conflict

---

**COURSE LENGTH:** 0.5 day(s)

### **COURSE DESCRIPTION**

This course will assist you in understanding and implementing strategies that will help to manage conflict effectively.

**COURSE OBJECTIVE:** You will identify the sources of conflict and how to manage conflict effectively.

**TARGET STUDENT:** Any business professional who encounters conflict in the workplace.

**PREREQUISITES:** There are no prerequisite skills for this course.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:  
develop skills to assess a conflict situation and monitor your reaction to the conflict. utilize effective communication techniques to manage conflict in a proactive manner. resolve conflict through identifying it's source, and determining and implementing the best solution.

### **COURSE CONTENT**

#### *Lesson 1: Recognizing Conflict*

Topic 1A: Identify Your Personal Reaction to Conflict  
Topic 1B: Develop a Healthy Attitude Toward Conflict  
Topic 1C: Assess the Situation  
Topic 1D: Avoid Conflict Escalation

#### *Lesson 2: Responding to Conflict* Topic

2A: Actively Listen  
Topic 2B: Communicate Effectively  
Topic 2C: Respond to Negative Tactics

#### *Lesson 3: Resolving Conflict*

Topic 3A: Identify the Source of the Conflict  
Topic 3B: Determine the Best Solution Topic  
3C: Implement the Solution

## Managing Innovation And Creativity

---

**COURSE LENGTH:** 0.5 day(s)

**COURSE DESCRIPTION:** Businesses are constantly looking for innovative ideas that will put them one step ahead of their competitors. In order to arrive at a truly new idea, a team leader or manager must understand how to manage the innovation process. This course offers effective managerial strategies that address the organizational aspects of managing a creative team, supporting that creativity, moving an idea to implementation, and troubleshooting ideas to help guide a team through the innovation process.



**COURSE OBJECTIVE:** You will identify how a creative team works and what your role is as team leader. You will explore how to lead a creative team from idea to implementation and how to troubleshoot problems in the innovative process.

**TARGET STUDENT:** Any manager or team leader who wants to guide a team of creative individuals to maximum productive innovation.

**PREREQUISITES:** Recommended courses: Business Writing, Presentations and Practical Leadership.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:  
manage the creative environment. examine the process of moving  
from idea to implementation.

### **COURSE CONTENT**

*Lesson 1: Managing the Creative Environment*

Topic 1A: Support Creativity

Topic 1B: Manage a Creative Team

Topic 1C: Troubleshoot the Creative Environment

*Lesson 2: Moving from Idea to Implementation*

Topic 2A: Choose the Best Project for Implementation

Topic 2B: Refine Ideas

Topic 2C: Decide to Implement or Abandon an Idea

Topic 2D: Troubleshoot During the Implementation Phase

## Marketing And Sales

---

**COURSE LENGTH:** 0.5 day(s)

A small marketing budget doesn't mean you can't meet your goals and business objectives – you just have to be more creative in your marketing tactics. This one-day workshop will show you how to get maximum exposure at minimum cost. Learn effective, low-cost and non-cost strategies to improve sales develop your company's image and build your bottom line.

### Learning Objectives:

- Recognize what we mean by the term “marketing”.
- Discover how to use low-cost publicity to get your name known.
- Know how to develop a marketing plan and a marketing campaign.
- Use your time rather than your money to market your company effectively.
- Develop a budget for your marketing activities, based on the amount of dollars you have available, and stick to your budget.
- Identify strategies for finding and keeping customers.

### Course Outline:

Introductions  
Course goals/personal goals  
Defining marketing  
Pre-assignment  
Trends  
Marketing strategies and research  
    Mission statements  
    Brochures  
    Trade shows  
Four Ps of marketing  
Market Planning  
Advertising  
Increasing business  
Networking  
Communication tips  
Review/Application/Evaluation





## Motivating Training - Motivating Your Workforce

---

**COURSE LENGTH:** .5 day(s)

**Overview:** It's no secret. Employees who feel they are valued and recognized for the work they do are more motivated, responsible and productive. This is a busy one-day workshop to help supervisors and managers create a more dynamic, loyal and energized workplace.

This program is designed specifically to help busy managers and supervisors understand what employees want, and to them a starting point for creating champions.

**How you will benefit:**

- Identify ways to link motivation to employee performance
- Recognize the external factors that can influence performance
- Discover ways to build and encourage employee accountability
- Learn effective strategies to encourage and sustain employee trust
- Explore ways that laughter and humor can enhance morale and increase motivation

**Pre-course preparation:**

Participants are asked to prepare for this training session by thinking about the answers to the following questions:

What is it that motivates you?

What are your biggest fears? How do they motivate you?

What are your greatest desires? How do they motivate you? Do you think you focus more on rewards or on penalties?

Be prepared to defend your answers

**Course Outline:**

Introductions and Pre-assignment

Motivation is an “inside” job

The three most common ways to motivate employees:

Fear

Incentives

Personal growth

Working with Human Nature

Maslow's Hierarchy of Needs

Linking Motivation to Performance

Define expectations

Set realistic standards and goals-together!

Document what you agree on—their course of action

Be clear about rewards

Be a role model

Build Trust and Hope

Respect your employees

Do what you say you are going to do

Watch what you say and how you say it

Communicate openly  
Show your human side  
Practice friendliness

#### Sustaining Employee Motivation

Create and share a vision of the way everyone should be treated  
Recognize excellent performance  
Be accessible  
Keep everyone informed  
Spend time coaching and teaching

Review Personal  
Action Plan



# Motivating Your Employees

---

**COURSE LENGTH:** 0.5 day(s)

## **COURSE DESCRIPTION**

This course will assist you in understanding and implementing strategies that will help to motivate your work force.

**COURSE OBJECTIVE:** You will identify motivation and the factors that influence it. You will also implement managerial strategies to increase employee motivation, to improve job performance, and ultimately to create a self-motivated work force.

**TARGET STUDENT:** This course is intended for new managers, especially those with direct reports, who are responsible for increasing employee motivation and job performance.

**PREREQUISITES:** None.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

## **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:

Identify employee motivation levels and needs.

Apply strategies to help motivate employees.

Apply strategies that create self-motivated employees.

## **COURSE CONTENT**

### *Lesson 1: Understanding Motivation*

Topic 1A: Recognize the Importance of Motivation

Topic 1B: Assess Employee Motivation Levels

Topic 1C: Meet Employee Motivational Needs

### *Lesson 2: Motivating Employees*

Topic 2A: Retain Good Employees

Topic 2B: Communicate Effectively

Topic 2C: Clarify Expectations

Topic 2D: Provide Effective Feedback

Topic 2E: Establish Goals

Topic 2F: Choose Rewards

### *Lesson 3: Encouraging Self Motivation in Employees*

Topic 3A: Encourage Self Motivation

Topic 3B: Create a Bond with the Organization

Topic 3C: Provide Professional Growth Opportunities

Topic 3D: Build a Sense of Accomplishment

Topic 3E: Encourage Enthusiasm

# Negotiating For Results

---

**COURSE LENGTH:** 1.5 day(s)

**Training Format:** Instructors understand and use up-to-date training techniques and a variety of training methods, including lecturettes, group discussions, case studies, problem solving exercises, and visual aids, to give all participants the best opportunities for learning.

Participants' handbooks will note key points, accommodate handouts, and provide space for individual learning. These workbooks will serve as a reference for individuals upon completion of this course.

**Workshop Objectives:** At the conclusion of this workshop, participants will be expected to:

- Understand the benefits of good negotiating skills.
- Identify those techniques that will be most effective in stressful negotiation situations.
- Have the opportunity to practice the “how to” of these skills in a supportive environment
- Recognize the stress that often accompanies negotiations and have some options for managing that stress.

**Pre-Workshop Assignment:** Participants will be asked bring to the workshop some examples of recent negotiating situations, including a situation they felt they handled well, a situation that could have been handled better, and a situation that they felt uncertain about. Participants will be asked to be prepared to share these examples with others in the group.

## **Agenda:**

Introduction

Icebreaker

Workshop Goals and Agenda

Defining Negotiation

Sharing Examples

The Four Greatest Human Fears and Their Implications for Negotiation Success

Humiliation

Rejection

Loss of Power

Failure

Negotiation Essentials

Preparation

Organization

Hot Buttons

BATNA-Best Alternatives to a Negotiated Agreement

Five Challenges to the Negotiating Process and What to Do About Them

Negative Emotions

Negotiating Habits

Skepticism

Perceived power

Your Reactions

Human Reactions: Yours and Theirs

Strike Back

Give in



Break off  
Stone Wall

Attack  
Trick

Buying Time to Think  
Pause  
Review and Summarize  
Take a Break

Get People on Your Side  
Defuse negative Emotion: The Communication Tunnel  
Get Them to Listen: Active Listening Techniques  
Build a Working Relationship  
Establish trust and rapport  
Watch your words  
Choose “I” vs. “You” statements

Engage in Problem-Solving  
Reframe Situations  
Ask Questions  
Open vs. closed  
Probes  
Avoid “Why?”  
Recognize the Problem  
Define Results Wanted  
Generate Alternatives and Agree on a Solution  
Keep Implementation in Mind

Make It Easy to Say “Yes”  
Four common Obstacles to Agreement  
Not their idea  
Unmet interests  
Fear of losing face  
Too much too fast  
Handling These Obstacles  
Involve them  
Build on their ideas  
Offer choices  
Don’t overlook basic human needs  
Don’t rush the finish

Make It Hard to Say “No”  
Educate  
Explain Consequences  
Reaffirm Commitment

The Conclusion  
End on a Positive Note  
When it’s Over, Leave

Managing Your Stress  
Recognizing Stress  
Techniques to Manage Stress

Review and Action Plan  
Evaluation

Suggested Workshop Agenda ½ Day

Pre-Workshop Assignment:

Participants will be asked to keep track of situations where they are called upon to use their negotiation skills, and to bring examples of these situations to the follow-up session for class discussion.

Ice Breaker  
Review of Session One  
Class Discussion of Participant Experiences.

Advanced Negotiating Skills  
Adapt Your Approach to the Person  
The Wizard of Oz

Negotiation Exercise

Review and Action Plan  
Evaluation

Post-Workshop Follow-Up:

Participants will be asked to complete an impact evaluation, 6 weeks after the conclusion of the two days of training, to determine whether they feel the training was valuable to them and whether they were able to use the concepts discussed when they were back in the workplace.



## Negotiating Skills

---

**COURSE LENGTH:** 1.0 day(s)

**COURSE OBJECTIVE:** You will perform the basic steps in a business negotiation.

**TARGET STUDENT:** Business professionals who may or may not be in a supervisory position and want to learn negotiating skills.

**PREREQUISITES:** There are no prerequisite skills for this course, however, you might be interested in the following related courses: Communication Skills, Business Presentations, and Business Writing: From Email to Proposals.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

**PERFORMANCE-BASED OBJECTIVES:** Upon successful completion of this course, students will be able to:  
prepare to negotiate in a business environment. initiate negotiations and follow through on their results.  
negotiate with your partner. follow through on a  
completed business negotiation. negotiate in  
unique business circumstances.

### COURSE CONTENT

#### *Lesson 1: Preparing to Negotiate*

Topic 1A: Establish a Successful Mindset

Topic 1B: Research the Other Party

Topic 1C: Determine the Value of the Item Being Negotiated

Topic 1D: Determine Where You'd Like Negotiations to Take Place

Topic 1E: Establish Your Best- and Worst-Acceptable Outcomes

Topic 1F: Research Your Best Alternative to a Negotiated Agreement (BATNA)

#### *Lesson 2: Initiating Negotiation: Establishing the Ground Rules*

Topic 2A: Establish Rapport

Topic 2B: Establish Your Status

Topic 2C: Choose the Communication Method for Negotiation

Topic 2D: Establish the Rules of Engagement

Topic 2E: Set a Timeline

Topic 2F: Establish How Negotiation Results Will Be Communicated and Implemented

#### *Lesson 3: Negotiating*

Topic 3A: Encourage the Other Party to Issue the First Proposal

Topic 3B: Make the First Proposal

Topic 3C: Counter the Offer or Proposal

Topic 3D: Accept an Offer or Abort Negotiations

Topic 3E: Work Through an Impasse

#### *Lesson 4: Following Through*

Topic 4A: Evaluate the Success of the Negotiation

Topic 4B: Follow Up on the Relationship

#### *Lesson 5: Negotiating in Special Circumstances*

Topic 5A: Cross-Cultural Negotiation

Topic 5B: Cross-Generational Negotiation

Topic 5C: Negotiation with Supervisors and Subordinates





## Orientation Handbook - Getting Employees Off To A Good Start

---

**COURSE LENGTH:** 1.0 day(s)

Getting Employees off to a Good Start: Orientation, Training and Handbooks

One reason people change jobs is that they never feel truly welcome or a part of the organization they join. If a company spends considerable money recruiting, interviewing and perhaps even relocating employees, it makes good sense to go one step further and make the new employee feel like they have made a good decision to come to this company.

A thoughtful new employee orientation program, coupled with an employee handbook that communicates workplace policies can reduce turnover and save that organization thousands of dollars. Whether your company has two employees or two thousand employees, don't leave new employee orientation to chance.

### Learning Objectives:

- Understand how important an orientation program is to an organization
- Identify role of the human resource department in the orientation program
- Recognize how the “commitment curve” affects both new employees and their managers.
- Know what companies can do to “deliver their promise” to new employees.
- Determine the critical elements of effective employee training
- Establish the importance of having an employee handbook for new and long-term employees.

### Course Outline:

Introductions, objectives, agenda  
Discussion of Pre-assignment  
An overview of retention practices in your organization  
Building employee commitment  
    Exercise  
    Clarity, competence, influence, appreciation  
Perceptions during orientation  
Mistakes to avoid in orientation  
Eight orientation habits  
The Commitment Curve  
Your Orientation Program  
FAQs about Orientation

Reconnect: Feedback exercise  
Employee Training in your organization  
Learning Styles Inventory  
Working with External Providers  
Adult learning Principles  
Creating Employee Manuals  
Practical application  
Review  
Personal Action Plans and Evaluations

## Performance Management

---

**COURSE LENGTH:** 0.5 day(s)

## **COURSE DESCRIPTION**

Performance management is a style of management designed to improve the performance levels of employees by creating and implementing performance management plans and through coaching and feedback.

**COURSE OBJECTIVE:** You will prepare, create, and implement a performance management plan.

**TARGET STUDENT:** Managers, supervisors, human resource personnel, and team leaders.

**PREREQUISITES:** There are no prerequisite courses for this course.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

## **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:  
prepare to create a performance management plan. create a  
performance management plan. implement a performance  
management plan.

## **COURSE CONTENT**

*Lesson 1: Preparing to Create a Performance Management Plan*

Topic 1A: Review Organizational and Departmental Objectives

Topic 1B: Verify Job Descriptions and Employee Performance Cycle Objectives Topic

1C: Request Information for Performance Appraisals

*Lesson 2: Creating the Performance Management Plan*

Topic 2A: Draft the Employee Appraisal

Topic 2B: Deliver Feedback to Employees

Topic 2C: Create an Employee Performance Plan

Topic 2D: Create an Incentive Plan

Topic 2E: Create a Development Plan

*Lesson 3: Implementing a Performance Management Plan*

Topic 3A: Collect Information

Topic 3B: Create Documentation

Topic 3C: Provide Coaching and Feedback

Appendix A: Sample Performance Appraisal Form

Appendix B: Sample Employee Performance Plan Document



## Performance Management - Managing Employee Performance

---

**COURSE LENGTH:** 2.0 day(s)

**Who Should Attend:** A course for supervisors who wish to acquire a further understanding of the supervisory management position, to better understand themselves and others through completing and interpreting the application of the Myers-Briggs Type Indicator, to develop their problem solving and decision making skills, and to explore performance management issues.

**Training Format:** Instructors understand and use up-to-date training techniques and a variety of training methods, including lectures, discussions, individual exercises, role plays and visual aids, to give all participants the best opportunities for learning.

Participants' handbooks will note key points, accommodate handouts, and provide space for individual learning. These workbooks will serve as a reference for individuals upon completion of this course.

### **Workshop Learning Objectives:**

Participants who complete this course will:

- You will better understand yourself and your personality preferences and temperament
- You will learn to use your strengths and work on your challenges to be a better communicator and team leader
- You will become more adept at analyzing workplace problems and have a variety of techniques for solving these problems
- You will have a process for managing employee performance, from a structured interview process to a structured performance review

### **Pre-course preparation:**

Participants are asked to prepare for this training session by completing a pre-workshop questionnaire as an informal way of determining their own preferences.

### **Workshop Outline:**

Introductions, Personal Learning Objectives, Agenda  
Understanding Ourselves and Others  
History of the Myers Briggs Type Indicator  
Your pre-workshop assignment  
MBTI assessment  
MBTI interpretation

Your Temperament - A Shortcut to Understanding You  
A description of each temperament  
Video: The Three Basics

The Supervisor as a Leader  
Your communication style and the MBTI  
Your leadership style and the MBTI

The Supervisor and the Team  
How the MBTI applies to teams  
Your team, its strengths and challenges  
Team predictions and your team dynamics

The Recruitment and Selection Process

- The importance of hiring good employees
- Position descriptions
- Interview questions
- Probing responses

## Clarifying Workplace Roles & Expectations

- Setting Performance Standards
  - Who should set them

- Performance Feedback
  - Give positive feedback
  - Give critical feedback
  - Learn to accept feedback

- Problem Solving
  - The problem solving process
    - The six-step problem-solving process
  - Establishing criteria for sustainable solutions
  - Tools for exploring options
  - Cost benefit analysis
  - Pros and Cons
  - Brainstorming

- Decision Making Types and When to Use Them
  - Autocratic decisions
  - Consultative decisions
  - Group decisions

- Resolving Interpersonal Conflict
  - Your preferences and conflict
  - The nine ground rules that empower you

- The Shared Management Model
  - The supervisor's role
  - The employee's role
- Managing Employee Performance
  - Defining expectations
  - Documenting performance
  - Planning your performance review
  - Conducting performance review
  - Following up on employee review
  - Maintaining performance
  - Dealing with problem employees

- Review
  - Commitment to an action plan
  - Evaluations

**Follow-up:** Participants are asked to follow the action plan to which they committed themselves and to complete an impact evaluation at the end of a 60 day period, to show how the strategies from the training session were helpful (or not).



## Practical Leadership

---

**COURSE LENGTH:** 1.0 day(s)

### **COURSE DESCRIPTION**

Up to this point in your career, you have been a successful employee or individual contributor, or have recently been promoted to manager. You have developed skills to be successful in your field. In this course, you will learn the practical skills you need to be an effective leader in your organization.

**COURSE OBJECTIVE:** You will learn practical leadership skills.

**TARGET STUDENT:** New managers and individual contributors seeking to develop or enhance leadership abilities with practical skills.

**PREREQUISITES:** You should possess experience working in an organization as an individual contributor or possibly as a manager. In addition to this course, you may want to consider the following related courses: Basics of Effective Communication, Persuading Others, Recognizing Employee Performance, and Setting Performance Goals and Expectations.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to:  
describe the transition from your role of individual contributor to that of a leader.  
develop an effective team. identify techniques for leading diverse groups to  
achieve business results. identify skills required to focus and lead your team to  
achieve business results.

### **COURSE CONTENT**

*Lesson 1: Transitioning from Individual Contributor to Leader*

Topic 1A: Define Leadership

Topic 1B: Identify Your Leadership Style

Topic 1C: Redefine Your Role

*Lesson 2: Developing an Effective Team*

Topic 2A: Develop an Effective Team

Topic 2B: Coach for Performance

Topic 2C: Influence for Results

Topic 2D: Empower Your Team Members

Topic 2E: Lead Your Team Through Organizational Change

*Lesson 3: Leading Different Types of Teams*

Topic 3A: Work with Different Types of Teams

Topic 3B: Overcome Communication Barriers

Topic 3C: Overcome Issues Among Team Members *Lesson*

*4: Aligning Your Strategy for Business Results*

Topic 4A: Identify Core Values

Topic 4B: Write a Vision Statement

Topic 4C: Establish a Mission Topic

4D: Develop Goals



## Problem Solving & Decision Making

---

**COURSE LENGTH:** 1.5 day(s)

**Overview:** As an individual, facts and knowledge can only go so far. Solving tough problems requires the ability to define the true problem, analyze the possible causes, create options, select the most feasible option, and then implement it. This two-day workshop should help individuals enhance their efforts to find sustainable solutions and learn new ways to approach problem-solving to reach win-win decisions.

**Pre-assignment:** Participants are asked to complete a “Personal Values” questionnaire and identify the 10 most important values in their life. They are also asked to come to the workshop prepared to share with the group one workplace problem they have been experiencing.

### Learning Objectives:

- Increase your awareness of problem solving steps and problem-solving tools
- Distinguish root cause from symptoms to identify the right solution for the right problem
- Improve your problem-solving and decision making skills through identifying your own problem-solving style
- Improve your ability to participate in and communicate about a collaborative problem-solving process
- Recognize the top ten rules of good decision making

Workshop Outline and Methodology:

Introductions, objectives, agenda

Pre-assignment

Learning Style Inventory

Scoring and interpretation

Practical application in problem solving

Define a “problem”

Describe the “ideal” problem solver

Identify the types of problems encountered

The Problem Solving Model

Define the problem

Perception

Definition

Analysis

Generate alternatives

Brainstorming

Checkerboard

Adapt or build on the past

Evaluate options

Criteria checkerboard

Evaluate options

Sort by category  
Rank order  
Advantages/disadvantages  
Pro/con  
What I like

Select the final solution  
Consensus

Straw voting  
Multi-voting  
Negative voting  
Revisiting earlier

Problem-Solving Outcomes  
Win/lose  
Lose/lose  
Win/win

Other problem solving techniques  
Legitimize problems  
Best/worst/most probable  
Problems as Given/Problems as Understood  
Lasso  
Is/Is not  
Diagram/Fishbone

Basic Questions  
Break into components

Force field analysis  
Ask an expert

Types of Decisions  
Autocratic  
Consultative  
Group

Guidelines for making good decisions Making  
bad decisions





## Project Management Training - Understanding Project Management

---

**COURSE LENGTH:** 2.0 – 3.0 day(s)

**Overview:** This program focuses on understanding project management and business process improvement. It is specifically recommended for “seasoned” supervisors or managers who are expected to fulfill their supervisory duties of “getting work done through the efforts of others” as well as work on innovative projects that focus on improvements opportunities. They are expected to add value based on their in-depth understanding of their organization, their industry and their resources.

### Learning Objectives:

- Understand just what is meant by a “project”
- Develop the skills a project manager must have
- Develop methods for keeping the team focused and motivated and the customer satisfied.
- Identify simple techniques and tools for planning and tracking your project
- Recognize what steps must be taken to complete projects on time and on budget
- Enhance ability to sell ideas to the sponsor, the customer and the team through meetings and presentations
- Understand ways to add value to your organization

### Workshop Outline and Methodology:

Facilitators use a variety of training methods for each workshop, including large group discussions, individual work and reflection, small group discussions and exercises, case studies and simulations for role play. Videos that are applicable will form a part of some work shops.

Customization will be based on information provided by the human resource department or the individual department prior to the workshop. These will be interactive workshops with a 40/60 split between concept/theory and practical application of skills discussed. Class size should be kept under 20, whenever possible, so each participant will have the opportunity to gain techniques for the types of situations they deal with or expect to deal with.

Introductions/Learning objectives (A large group exercise where participants get to know one another and then do an exercise to know one another better and feel comfortable in the group setting-3/4 hour)

- Pre-assigned reading (Discuss the concept that each of us do projects and how to prepare ourselves to be “accidental project managers”. Discuss projects and how we find or are assigned a project)
- What is a “project”?
- How “projects” fit into the 21st century workplace
- Projects that are worthwhile doing (Discuss how to know when projects add value to the organization and when you have the time, commitment and resources to do them)
- Selling your project (How do you sell your project)
- The stakeholder roles

Your Role as a Project Manager (Discuss the three types of project manager, and what your various roles will be in each of the four stages of a project, with exercises to demonstrate your 4 various roles-1 hour).

- Relationship with your project sponsor
- Understanding the scope of the project
- Dealing with dual responsibilities
- Your leadership role
- Your interpersonal role
- Your informational role
- Your decision making role

(An energizer for after lunch)

#### The Seven Traits of a Good Project Manager

- Enthusiasm
- Ability to manage change (The four room apartment)
- Tolerant of ambiguity
- Team builder/negotiator (A survival exercise)
- Customer service orientation (A checklist)
- Understand priorities (an exercise on prioritizing the project tasks ½ hour)
- Knowledge of the industry

Assignment-participants are given further directions for developing their own project (only for classes running for 3 days)

(Participants work in teams to identify project activities, determine their order, how long each activity would take and then prepare a work breakdown structure)

The Team Meeting (A large group discussion about working with your team, whether you get to choose them or they have been chosen for you-1/2 hour)

Choosing your team

Defining roles

Before the meeting

- Information gathering
- Agenda planning

During the meeting

- Goals
- Completion Date • Budget

After the meeting

- Follow-up
- Follow through

(At the end of this discussion, you will prepare for a meeting as a small team, and role play a 15 minute segment of this for your group)

Resolving Conflict (Large group discussion on issue resolution. Group have a case study they are to resolve and then role play-1 hour)

Planning Tools (Participants discuss various tools, and have the opportunity to use each tool in an exercise)

- Cost benefit analysis
- Dependency chart
- Milestone & Gannts
- Critical path
- Other tools

Charts, Costs and other Puzzles

- Tracking tasks
- Coping with delays
- Making adjustments
- Finding and fixing mistakes

Communication (1 /4 hour)

- With the sponsor
- With the team



Controlling Costs (Participants go back to the work breakdown structure from the morning to build their budget- 1 hour)

- Building a budget
- Budget control
- Monitoring and controlling the budget

Exiting a Project (Large group discussion on how to let go of a project)

- Inclusion
- Integration
- Extinction

Presentation Skills

(In any remaining time this morning participants work on their projects)

The Assessment Process (Discussion of the project –1/4 hour)

- What went well
- What flopped

What is Your Next Project

- Benchmarking
- Best practices
- Critical evaluations

Individual/team presentations

Review (The weakest project management link)  
Personal Action Plan

### **Your Project**

During the first day of the workshop, you will be asked to identify a project or assignment from your workplace that you can work on during the remainder of the training. On the afternoon of the third day, you will be asked to make a short presentation on your project.

# Public Speaking: Tools for Confident Communication

---

**COURSE LENGTH:** 1 day(s)

**MAIN OBJECTIVES:**

- Overcoming Fear / Building Confidence
- Understanding & Using Proven Public Speaking Tips & Tricks
- Using Public Speaking & Communication Skills as a Personal & Professional Lifestyle Tool

**OUTLINE:**

Earning Potential / Data Statistics

7 Reasons Why Speakers Flop

Quick Tricks for

Public Speaking

Analogy & Metaphor

Life Speech Filter

Open Ended Questioning

Problem-Solution-Challenge

Being True To Yourself

Keeping It Positive

Above Board Speech

Tasteful Humor

Praise & Criticism

Slander

The Great Art of Story Telling

Postmodernism

Wisdom Above Legalism Must-Know  
Stories

Who Am I?

Why Am I Here?

My Personal & Corporate Vision Story

Disarming

I Know What You Are Thinking & Pink Elephants

Articulating Values through Story

Do's & Don'ts in Story Telling

Avoid Pomposity

Boredom & Long-windedness

Guilt & Fear: Avoiding Manipulation in Speaking

Tapping Humanity

Hope

Communication Philosophy

Transactional vs. Transformational Leadership

Always Over Communicate

Life Is Negotiation

Public Speaking Using Presentation Software

Why Use It?

Multimedia Types

Presenter Notes

Multimedia Usage

Multimedia Slides

Observe a Speech and Review Tools Used in Speech

Attention Getters



- Shocking Facts
- Stories
- Quotations
- Problem-Solution-Challenge
- Phases & Types of Presenters
  - Avoider
  - Resister
  - Acceptor
  - Seeker
- Anxiety Reducers
  - Organize
- Visualize
  - Practice
  - Breathe
  - Relax
  - Release Tension
  - Move
  - Eye Contact
- Initial Stages:
- Preparation Checklist
  - Establishing Objectives
  - The Audience: Values, Needs, & Competencies
  - Clustering
  - Preview & Review
  - Hooking Catchy Intros & Backgrounds
  - Visual Aids
  - Leveraging Anxiety
  - Energy & Synergy: Ebbs & Flows of the Speech
  - Rehearsing
  - Q&A: Anticipating the Questions
  - Body Language

# Running Effective Meetings: The C.A.N.V.A.S. Model

---

**COURSE LENGTH:** 1.0 day(s)

## **LEARNING OBJECTIVES:**

- Understand how to use meetings as a management tool
- Employ the key planning steps that ensure meeting effectiveness
- Define the intended minimum and optimum outcomes for meetings
- Apply tools and methods for facilitating efficient and productive meetings
- Understand how to create participative meeting environments
- Manage participant behavior as a facilitator
- Develop accountability & follow through after meetings
- Develop commitment & specific actions to improve meetings in which you personally participate

## **THE BENEFITS THAT WE ARE SEEKING:**

- Elimination of unnecessary meetings
- Increased meeting productivity
- An organizational culture that promotes results based meetings
- Improved team and organization communication and performance

## **OUTLINE:**

### ***Lesson 1 – Meetings as a Management Tool***

- Three Primary Purposes for Meetings
- Top 4 Frustrations Of Meeting Attendees
- Factors that Influence Determine Meeting Effectiveness
- Effect of Meetings on Productivity
- Calculating Meeting Salary Cost □ Meeting Communication Elements Chart
- Meeting Effectiveness vs. Meeting Efficiency

### ***Lesson 2 – PLANNING the Meeting***

#### **Meetings Step 1 – C.larity**

- Fundamental Purpose of Meetings
- Meeting Purpose & Planning Framework Table
- Establish Leadership □ Primary Skills of the Leader
- Rate Your own Meeting Leadership Skills

#### **Meetings Step 2 – A.ttendees**

- Choosing the Attendees
- Environmental Considerations: 1) Physiological & 2) Psychological
- Purposes of the Agenda
- Tools for Predefining Expectations

### ***Lesson 3 – CONDUCTING the Meeting***

#### **Meetings Step 3 – Navigation**

- Keys to Effectiveness
- Tactics for Managing Discussion

#### **Meetings Step 4 – V.elocity**

- Creating, enforcing, & reinforcing the Code of Conduct



- Dealing with Inappropriate Behavior in Meetings
- Facilitation & Presentation Skills
- Dealing with Time and Pace: Methods for Effective Use of Time

**Lesson 4 – FOLLOW-UP**

**Meetings Step 5 – Accountability**

- Measuring Meeting Success
- Reaching Closure & Sharing Feedback

**Meetings Step 6 – Synchronization**

- Distribute Notes or Confirmation □ As the Leader, Follow-Up after the Meeting
- Ascertaining best practices for following up meetings

**Lesson 5: MEETING MINUTES**

- Note Recorder Styles and Recording Formats
- Note Taking Tools

## Sales - Prospecting For Leads Like A Pro

---

**COURSE LENGTH:** 0.5 day(s)

**Overview:** Prospecting is the key to your success. Your success today is a result of the prospecting you did six months ago. Become skilled at networking and remember the old 80/20 rule. Know who to target and how to target them, and remember to do some prospecting every day through warming up cold calls, following up on leads, or networking. Build your personal prospecting plan, to ensure your future by planting seeds daily.

Introductions, Objectives, Agenda

Pre-assignment discussion

Target your market

A prospect board

Setting goals

Where do you find prospects?

- Networking

- Public speeches and workshops

- Attend trade shows

- Lost accounts

- Other ways

Cold calling

- Overcoming call reluctance

- Getting past the gatekeepers

- Getting their attention

- Warming up cold calls

Communication skills

- Listening

- Observing

- Clarifying

Questions to ask yourself about prospecting

The 80/20 rule

Building relationships

Twenty-one ideas





## Sales Training- Selling Smarter

**COURSE LENGTH:** 0.5 day(s)

**Overview:** It's no secret that selling has changed in recent years. We are all working harder, with more responsibilities. High pressure selling is no longer effective. Customers want involvement. They want to be recognized and listened to. And they don't want you to forget them once the sale is made. This workshop will help employees feel more comfortable and skilled in selling to their customers and to help them identify and address some of their customer service challenges.

### Learning Objectives:

At the completion of this workshop, participants will:

- Understand the wonderful paradox: helping other people get what they want gives us more of what we want.
- Use goal-setting techniques as a way to focus on what you want to accomplish and develop strategies for getting there.
- Recognize the difference between features and benefits of products and services, and develop a plan for increasing product knowledge.
- Identify the most critical elements of telephone sales and customer service
- Understand the power of your behaviour for more successful sales and customer service.
- Develop communication skills to better share information and to better listen to the customer
- Recognize opportunities for both individual and team problem-solving

### Pre-Workshop Assignment:

Participants will be asked to complete a questionnaire about sales and customer service perceptions.

### Workshop Outline:

Introduction and Learning Objectives

Discussion of pre-assignment

What selling is all about?

Behind every sale is a person

Find out what they want

Figure out how to help them get it

People buy trust and service

That first seven seconds

Setting achievable goals

The value of setting goals

The characteristics of SMART goals

Developing a strategy to reach your goals

Celebrating success & thinking like a winner

Know your products and services

What are your products and services?

What are their outstanding features or USPs?

How do these benefit customers?

Telephone techniques

The verbal handshake

Using your voice effectively

Telephone manners

Using your telephone as a sales tool



Building relationships by phone

Deal with objections

Ask for the sale

Review and evaluation



## Speakeasy

**COURSE LENGTH:** 0.5 day(s)

### Speak Easy Basics

This workshop is for anybody who wants to improve their speaking skills in informal situations.

#### Learning Objectives:

- To enhance the ability to speak one-on-one with others.
- To develop the confidence to feel at ease, speaking socially or small groups such as meetings.
- To practice developing these skills in a safe and supportive setting

#### Outline:

- Learning Objectives
- Communication
- The Skill of Interactive Listening
- How do You Rate Your Listening Ability?
- The Power of Questions
- Self-Disclosure
- Body Language
- Re-designing Yourself for Strength □ What does Professional Mean?
- The Art of Conversation
- Fifteen Ways to Master a Meeting
- Critical Circumstances and Sticky Situations
- Controlling Physical Nervousness
- Controlling Mental Nervousness
- A Personal Action Plan

## Strategic Planning Skills

---

**COURSE LENGTH:** 0.5 day(s)

### **COURSE DESCRIPTION**

This course will provide you with a process for developing a clear understanding of your business's culture, operations, and market position, while facilitating the development of a strategic blueprint for gaining the competitive advantage necessary for your business's success, now and in the future.

**COURSE OBJECTIVE:** You will develop an approach to the formulation of strategic programs and initiatives critical for effectively leading and managing an organization.

**TARGET STUDENT:** Executives, managers, consultants, and other business professionals who are responsible for strategic planning in an organization.

**PREREQUISITES:** An understanding of business processes. Suggested courses: Practical Leadership, Leading and Managing Teams, Managing Change

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### **PERFORMANCE-BASED OBJECTIVES**

Upon successful completion of this course, students will be able to: prepare for the strategic planning process.

develop a mission statement, define a vision for your organization, and conduct an assessment of internal and external factors that influence your business. apply the information you have gathered and work to apply the values of your company's mission with its vision to create a successful strategy for your business operations. put the plan into action and work toward the vision. You will implement and monitor the plan to gauge its effectiveness.

### **COURSE CONTENT**

#### *Lesson 1: Preparing for the Strategic Planning Process*

Topic 1A: Set the Parameters for the Strategic Planning Process

Topic 1B: Establish a Committee

Topic 1C: Gather Operational Data

#### *Lesson 2: Initiating the Strategic Planning Process*

Topic 2A: Develop a Mission Statement

Topic 2B: Develop a Vision Statement

Topic 2C: Assess Internal/External Environments

Topic 2D: Perform SWOT Analysis

#### *Lesson 3: Developing the Strategic Plan*

Topic 3A: Prioritize What the Strategic Plan Will Address

Topic 3B: Set Goals and Objectives

Topic 3C: Develop Strategy for Achieving Goals

Topic 3D: Draft the Strategic Plan

#### *Lesson 4: Executing the Plan*

Topic 4A: Assign Responsibility and Authority

Topic 4B: Establish a Monitoring System





## Successful Business Writing

**COURSE LENGTH:** One day of training.

**PREREQUISITES:** There are no prerequisites for this course.

**DELIVERY METHOD:** This course is designed for instructor-led, group paced classroom-delivery, providing students with structured hands-on activities.

### SETUP REQUIREMENTS

A computer projector

A whiteboard and markers (or a flip chart and markers)

A Podium

An extra table for supplies

### COURSE CONTENT

Session One: Introduction and Course Overview Session

Two: Why Write?

Session Three: The First C: Clarity

Session Four: The Second C: Conciseness

Session Five: The Third C: Completeness

Session Six: The Fourth C: Correctness

Session Seven: Word Agreement

Session Eight: Active and Passive Voice

Session Nine: Sentences and Sentence Types

Session Ten: Readability Index Session

Eleven: The Fifth C: Courtesy

What's My Style?

Session Twelve: Practical Language

Session Thirteen: Inclusive Language

Session Fourteen: Sentence Construction Session

Fifteen: Punctuation

Session Sixteen: Writing Business Letters

Steps to Writing Business Letters

Dissecting Letters

Parts of a Business Letter

Types of Letters

Session Seventeen: Reports

Session Eighteen: Spelling & Proofreading

Session Nineteen: Writing Memos

Session Twenty: E-Mail Etiquette

Session Twenty-One: Writing Challenges A

Personal Action Plan



## Supervisor Training - The ABC's Of Supervising Others

---

**COURSE LENGTH:** 1.5 day(s)

### The First Time Supervisor

**Overview:** This workshop is designed to help you overcome many of the supervisory problems you will encounter in your first few weeks as a boss—whether you are a team leader, a project manager or a unit coordinator. Dealing with the many problems a new supervisor encounters isn't easy but it doesn't have to lead to discouragement.

#### Learning Objectives:

- Help clarify roles and responsibilities of the new job
- Adjust to the new role with confidence and an assurance you can handle the position
- Develop your communication skills in listening, asking questions and giving feedback to employees.
- Develop a technique for making sure you give employees instructions that are clear and understood,
- Identify some techniques to deal with employee challenges such as squabbles, complaints and laziness
- Recognize the importance of being visible and available to employees
- Understand the importance of developing good relationships with employees and peers, so you are seen as fair and consistent.

Introductions, Objectives, Agenda

Pre-assignment

Getting started as a new boss  
Overcoming initial anxieties  
Getting off to a good  
Learning the ropes

Establishing authority  
Dealing with friends you now supervise

Practical tips on handling your responsibilities  
Know what is expected of you

Identifying priorities  
Be available and visible  
Identify out employee abilities

The communication skills you need  
Become a good observer  
Learn to listen  
Ask open questions  
Document your day  
Give clear  
Know the difference between orders, requests and suggestions

Reconnect and feedback-30 minutes

Dealing with employee concerns  
Build trust with employees  
Learning to say "no"

Resolving squabbles

Recognizing individual capabilities and contributions

How to work with others

- Working with your boss

- Working with your peers

- Accept responsibility for your group

- How to stand up for yourself

Mistakes to avoid

- Getting angry

- Appearing to play favourites

- Being too bossy

- Getting on the wrong side of the union

- Other mistakes

Supervisory success

- Establish a daily routine

Keep on learning

- Lead by example

- Deal with problems immediately

- Be firm but fair

- Ask for help when you need it

Review, Action plan, Evaluation





## Team Building - Developing High Performance Teams

---

**COURSE LENGTH:** 2.0 day(s)

**Overview:** Your success as a manager can often depend on how well your team operates. How are their problemsolving skills? Are they enthusiastic and motivated to do their best? Do they work well together? There have been hundreds of studies demonstrating that human beings function better and learn better in groups. If you want to develop your team leadership skills and unleash the talent of your individual team members, this workshop is a practical look at current leadership practices that work.

**Additional material:** High Five by Tom Blanchard and Sheldon Bowes, Don Carew Eunice Parisi-Carew

### Learning Objectives:

- Examine the work practices of high performing teams
- Create line of sight between what your team does and your organization's business strategy
- Build teamwork by recognizing and tapping into the five basic types of information your team needs.
- Promote trust and rapport by exploring your team player style and how it responds to team values
- Recognize the key elements that move a team from involvement to empowerment and how to give these elements to your team
- Develop five training steps to unleash team potential and develop team problem-solving and assessment skills
- Develop a model for successfully mentoring and coaching others.

Pre-workshop assignment: The Team Player Survey

### Workshop Outline:

Introductions, learning objectives and agenda

Discussion of pre-assignment

The Team Player Survey

Validating your style

Understanding your social and behavioral styles

Moving out of your comfort zone

Implications for change

The obsolescence of hierarchy

The downsizing of the workforce

The move to cooperation

Types of teams

Exploring High Performance Teams

Tuckman's stages of teams

The Team Performance Model

Your role as the team leader

Setting goals

Communicating

Involving

Supporting

Assignment: Team Project

From Involvement to Empowerment

Developing competency  
Building trust and collaboration

The Freedom for Creative Thinking  
Barriers to creative thinking  
Lateral thinking vs. vertical thinking  
Left brain/right brain  
The Six thinking hats

Team Problem-Solving  
The pursuit of improvement  
No lone rangers  
Types of problems  
Problem-solving tools

Decision-Making Climate  
Developing an open atmosphere  
Using leadership skills to reach consensus  
The gradients of agreement

Facilitation Skills  
Encouraging divergent thinking  
Gathering points of view  
Facilitating convergent thinking

Managing Team Conflict  
Open communication  
Sharing information  
Methods for dealing with conflict  
The six steps to conflict resolution

The Manager's Role in Managing Change  
Empathy  
Communication  
Participation  
Helping the team move through the stages of change

Assessing Team Projects

Presentations: The Coaching Model

Review

Personal action plans and Evaluations



## Telemarketing - Using The Telephone As A Sales Tool

---

**COURSE LENGTH:** 0.5 day(s)

Using the Telephone as a Sales Tool

**Overview:** Selling is a skill area in which you never stop learning. Virtually everybody in sales today sells over the phone at least part of the time, but is it time for you to evaluate how you use the telephone and where it fits into your sales and marketing mix. The telephone can supplement, enhance and sometimes replace other means of marketing and selling, and it can dramatically increase your sales success. Develop your communication, persuasion and negotiation skills so that every sales call is personalized to each prospect and each situation.

Introductions, Objectives, Agenda

Pre-assignment discussion

Change your skills and change your income

How to separate your company from the competition

Trust, Respect and the Potential Customer

Styles of Human Relations

Self-evaluation

Analyzing a crazy idea

Warming up cold calls

Developing your script  
Variations on your script  
Practical application

If you must SELL by telephone

Review

Personal Action Plans and Evaluations

## The Minute Taker's Workshop

---

**COURSE LENGTH:** 0.5 day(s)

**Overview:** No matter who you are or what you do, whether at work or in the community, you are involved in meetings. And meetings are costly, even if they are held in a company boardroom. To ensure meetings are productive and worth the expense involved, three ingredients are necessary: An assurance of closure, a strong chair or leader, and accurate minutes. It has been said that if the minutes of a meeting are not accurate, then the meeting may just as well not have taken place.

If people can't remember or agree on what actually occurred at a meeting, how can the group effectively accomplish its objectives? This one-day workshop helps minute-takers understand their role and the best techniques for producing minutes that include all the essential information needed.

### Workshop Learning Objectives:

At the conclusion of this workshop, participants will:

- Recognize the importance of minute-taking and be able to use them to their advantage.
- Be able to remedy many of the complaints that beset minute-takers
- Be able to write minutes that are suitable for formal meetings, semi-formal meetings and action minutes.
- Develop the essential skills of an effective minute-taker

### Pre-assignment:

Participants are asked to bring along a copy of minutes from their latest meeting (non-confidential) to critique and compare.

### Workshop outline:

Introductions, objectives and agenda  
Discussion of pre-assignment

#### The Role of a Minute-Taker

Handling common problems you experience  
Developing a meeting agreement

#### Minutes for Formal Meetings

The need for good minutes  
Organizing formal minutes  
Headings  
Motions

#### Minutes for Informal Meetings

Semiformal minutes  
Action minutes

#### Techniques for Preparing Minutes

Before the meeting  
At the meeting  
After the meeting

#### The Minute Book

Bylaws and Procedures

#### Computers: The Latest Tool



Advantages and disadvantages  
Electronic meetings

Taking Minutes in an Interactive Meeting  
A Final Word

Listening skills  
Behind the scenes  
Hidden variables  
Your image

Review and Evaluations

# The Professional Supervisor

---

**COURSE LENGTH:** 2.0 day(s)

## Learning Objectives:

Participants who complete this course will:

- Comprehend the scope, nature and responsibility of the supervision/management role and the demands this role places on them.
- Acquire an understanding of their role as leaders, team builders and good communicators, and how these skills impact on effective supervision of their team.
- Grasp the importance of setting goals, planning and prioritizing, in order to achieve organizational objectives.
- Accept the viewpoint that they are responsible for achieving results through the efforts of others.

## Pre-course preparation:

Participants are asked to prepare for this training session by completing a self-assessment “Skills Inventory for Supervisors”.

## Course Outline:

The Role of the Supervisor

- Moving from doing to planning
- Making the transition
- The problems new supervisors encounter
- Supervisory responsibilities to your organization, your team and yourself

The Thinking and Planning Process

- Elements of planning
- Setting goals and objectives
- Six steps in the planning process
- Prioritizing your workload

Leadership

- Defining the meaning of leadership
- The characteristics of leaders
- Direction and support
- Four styles of leadership
- Four stages of followers
- Applying situational leadership

Working as a Team

- The advantages and disadvantages of the team concept
- The four stages of team building
- The supervisor’s role in each stage
- Building a team: conduct and characteristics of team members
- Valuing the diversity of the team

Communication

- Barriers to good communication
- Developing good listening skills
- Developing good questioning techniques
- Understanding non-verbal messages: yours and theirs
- The importance of feedback and how to give it



- Accepting feedback from others

#### Orientation and Training

- Defining expectations
- Adult learning principles
- How we learn

#### Motivation

- What do we value in work?
- Three fundamental motivational techniques
- Motivational theories and how they apply in the real world
- Motivating without money

#### Delegation

- Defining delegation
- Why we avoid delegating
- Why we should be delegating more
- Guidelines to effectively delegate

#### Resolving conflict

- Intervention strategies
- Dealing with difficult people/situations

#### Basics of Discipline

- Action without discipline
- A commitment to action
- The four-step process

#### Conclusion

- Review
- Commitment to an action plan
- Evaluations

#### Follow-up

Participants are asked to follow the action plan to which they committed themselves, and to complete an impact evaluation, a re-assessment of their skills, at the end of a 60-day period.

## Time Management - Get Organized For Peak Performance

---

**COURSE LENGTH:** 0.5 day(s)

**Training Format:** Instructors understand and use up-to-date training techniques and a variety of training methods, including lecturettes, group discussions, case studies, problem solving exercises, and visual aids, to give all participants the best opportunities for learning.

Participants' handbooks will note key points, accommodate handouts, and provide space for individual learning. These workbooks will serve as a reference for individuals upon completion of this course.

### **Workshop Objectives:**

At the conclusion of this training program, participants will be expected to:

- Better organize their workspace and their paper for peak efficiency
- Understand the importance of setting goals and developing strategies for achieving them.
- Understand the importance of prioritizing work in order to meet deadlines
- Take control of those things that would derail workplace productivity

**Pre-Workshop Assignment:** Participants will be asked to (1) discuss the workshop with their manager, to make certain they will have time at conclusion of the workshop to discuss priorities and organize their workspace. They will also be asked to (2) complete a workload analysis and (3) identify a buddy who will support them as they make the changes required to work more efficiently.

### **Workshop Outline:**

Introductions, Learning Objectives and Agenda

Discussion of Pre-workshop Assignment

Developing a Personal Productivity Philosophy

Identifying productivity pay-offs

Working on the right things

Setting SMART action goals

Taking responsibility to make sure plans get implemented

Learning to Plan

The elements of planning

Choosing a planner and using it properly

Turning a "To Do" list into action

Organizing Your Work Area and Your Paperwork

Organizing your work area

Organizing your filing system and keeping it organized

Handling reading and mail

Working Effectively with Technology

Computer files

Electronic email

Managing Projects

What is a "project"?

Setting project goals

Determining "Milestones"





Developing “Project Action Plans”  
Budgeting time and financial costs

Effective Use of Meeting Time

- When you chair a meeting
- When you attend a meeting
- The follow up to a meeting
- Alternatives to meetings and how to use them

Removing Obstacles

- Dealing with interruptions
- Dealing with the telephone
- Dealing with your supervisor/manager
- The need for change and self-discipline
- Measuring progress

Review and Action Plan

Evaluation

**Post-Workshop follow-up:** Participants will be asked to complete an impact evaluation, 6 weeks after the conclusion of the program, to determine whether they feel the training was valuable to them and whether they were able to use the concepts discussed when they were back in the workplace.

## Train The Trainer - The Practical Trainer

---

**Overview:** Give your On the Job Trainers high caliber training and empower them to Success!

**Course duration:** 3-4 day(s). The program will run three to four days depending upon how many employees are signed up. There is a minimum participant number of three.

### Course Outline:

- ✿ Lesson 1: Introduction and Overview
- ✿ Lesson 2: Using Adult Learning Principles
- ✿ Lesson 3: Analyzing the Training Requirements
- ✿ Lesson 4: Developing Learning Objectives
- ✿ Lesson 5: Outlining the Training Content
- ✿ Lesson 6: Selecting Training Methods
- ✿ Lesson 7: Developing and Using Training Aids
- ✿ Lesson 8: Developing a Lesson Plan
- ✿ Lesson 9: Using Basic Facilitation Skills
- ✿ Lesson 10: Handling Problem Situations
- ✿ Lesson 11: Practice Training
- ✿ Lesson 12: Evaluation Training
- ✿ Lesson 13: using the Training Skills
- ✿ Lesson 14: On-The-Job Aids



## Writing Reports And Proposals

---

**Course duration:** 1.5 day(s)

**Overview:** This two-day workshop is intended to help you prepare professional reports and proposals. As a manager at any level in business, government, or industry, you must write reports, to explain things, or to present your research findings. You may also write proposals to convince others of the value of some course of action.

**Pre-assignment:** Bring a sample of a report you have done for critiquing, as well as information you will use to write an upcoming report or proposal.

### Learning Objectives:

- To learn the value of good written communications
- To develop paragraphs that introduce, connect, develop and conclude some part of an idea
- To prepare reports and proposals that inform, persuade and provide information
- To learn how to proofread your work so you can feel confident it is clear, concise, complete and correct
- To provide an opportunity to apply these skills in real work applications.

Introductions, Learning Objectives

Pre-assignment (Discuss general preparation for workshop and type of report/proposal each participant will be working with)

Making writing clear, complete, concise and correct

Planning your report

- Investigation
- Resources
- Search strategies
- Citing sources
- Rules of evidence

Planning sequence

- Purpose
- Audience
- Primary
- Secondary
- Format
- Direct
- Indirect
- Evidence
- Organization
- Remember PAFEO

Main elements of a report

- Introduction
- Body/discussion
- Conclusion
- Recommendations

Sequencing information

---

## Chronological

---

- Order of importance
- Problem and solution
- Least to most
- Other

## Parts of a Formal Report

- Rules for headings
  - Major heading
  - Sub heading
  - Secondary sub heading
  - Headings as signposts

## Tables and graphs

- Types
- Points to remember

## Outlining Your Report

- Brainstorming
- Mind mapping
- Post-it notes
- Six Thinking Hats

## Checklist for Revision

- Facts
- Length
- Style
- Organization

## The Ten Steps of Proposal Writing

- The acid test

## A strategy

- To inform
- To persuade

## Steps to persuade

- Credibility
- Expertise
- Objectivity

## Tough questions

## Review

- Personal Action Plan
- Evaluations



## PART III: ADVANCED MANAGEMENT & LEADERSHIP TOPICS

- ✱ Blake/Mouton Managerial Grid (one best style) [Impoverished Leader; Middle of the Road Leader; Country Club Leader; Team Leader]
- ✱ Board of Directors
- ✱ C.A.R.S.S. Classification Challenge & opportunities for greatness
- ✱ Chris Argyris' Value System (Bureaucratic/Pyramidal; Humanistic/Democratic; Immaturity/Maturity Continuum)
- ✱ Communications in Leadership Conflict (Credibility is the foundation of leadership)
- ✱ Cross Cultural Leadership (not necessarily international) Customer Service
- ✱ D. M. McGregor's Theory X and Theory Y Delegation
- ✱ Efficient Leadership & Management – avoiding time traps and trapping key moments
- ✱ Engstrom's Leadership Styles (Laissez Faire; Democratic – Participative; Manipulative – Inspirational; Benevolent – Autocrat; Autocratic – Beaucratic)
- ✱ Equipping & Empowering the Subordinates
- ✱ Fiedler's Contingency Model (Task Oriented Leaders; Relationship Oriented Leaders; Favorable/Unfavorable Situations)
- ✱ Findberg's Rules of Motivation
- ✱ Gallup's Talents vs Skills Proficiencies
- ✱ Gary Yukl's Trait/Skills
- ✱ Hersey-Blanchard's Situational Leadership (more than one best style) [Style determined by the Follower; Telling Style; Selling Style; Participating Style; Delegating Style]
- ✱ Herzberg's Motivational/Hygiene Theory
- ✱ House's Path-Goal Approach
- ✱ Influence VS. Management
- ✱ Ingredients of Leadership
- ✱ Leadership Base Elements
- ✱ Leadership Development
- ✱ Leadership development in self-development
- ✱ Leadership Eras (Great Man; Traits; Behavior; Contingency Era (Style Era); Complexity Era
- ✱ Leadership in Non-Profits
- ✱ Leadership is in the eye of the beholder
- ✱ Leadership VS Management
- ✱ Leading Change
- ✱ Leading Groups & Organizations
- ✱ Leading Multiple Generations in the Workplace
- ✱ Maslow's Hierarchy of Needs (Physiological; Safety or Security; Social or Affiliation; Esteem Needs; Self-Actualization; Maslow VS Alderefer; "what people want from their jobs")
- ✱ Mentoring & Coaching in Leadership
- ✱ Monkey Management Ohio State University Studies (Consideration/Initiation of Structure) Organizational Theory and Practice
- ✱ Sally Helgesen: "The Female Advantage: Women's Ways of Leadership"
- ✱ Servant & Collaborative Leadership
- ✱ Shared values (make a critical difference in the quality of life at home and at work) Trust without trust you cannot lead
- ✱ Values
- ✱ Vision & Inspiration in the differentiation of leaders

---

## PART IV: HARD SKILLS

---

*(NOTE: Office 97, XP/2003, and 2007 outlines will vary slightly; Office 2003 shown unless otherwise stated). All Hard Skills Classes are One Full Day unless noted otherwise.*

### 2007 New Features For IT Professionals, Advanced Users, & Trainers

---

**COURSE LENGTH:** 0.5 day(s)

Choose 4 of the five main Office Applications (Access, Excel, Word, PowerPoint, Outlook). Each student will receive a 400 page manual with CD-Rom. There will be a heavy concentration on the Philosophical shift into Office 2007 with a focus on Excel. Heavy hands-on class. See the Outlines for *Microsoft 2007 New Features* for book outlines.

### Adobe InDesign

---

### Adobe Photoshop



## Microsoft Access Level I

---

**COURSE OBJECTIVE:** You will be introduced to the features of the Access 2003 application.

**TARGET STUDENT:** This course is designed for students who wish to learn the basic operations of the Access 2003 database program to perform their day-to-day responsibilities, and to understand the advantages that using a relational database program can bring to their business processes. The Level 1 course is for the individual whose job responsibilities include working with tables to create and maintain records, locate records, and produce reports based on the information in the database. It also provides the fundamental knowledge and techniques needed to advance to more technical Access responsibilities, such as creating and maintaining new databases and using programming techniques that enhance Access applications.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: An Overview of Access*

- Topic 1A: Understand Relational Databases
- Topic 1B: Examine the Access Environment
- Topic 1C: Open the Database Environment
- Topic 1D: Examine an Access Table

### *Lesson 2: Managing Data*

- Topic 2A: Examine an Access Form
- Topic 2B: Add and Delete Records
- Topic 2C: Sort Records
- Topic 2D: Display Recordsets
- Topic 2E: Update Records
- Topic 2F: Run a Report

### *Lesson 3: Establishing Table Relationships*

- Topic 3A: Identify Table Relationships
- Topic 3B: Identify Primary and Foreign Keys in the Relationships Window
- Topic 3C: Work with Subdatasheets

### *Lesson 4: Querying the Database*

- Topic 4A: Create a Select Query
- Topic 4B: Add Criteria to a Query
- Topic 4C: Add a Calculated Field to a Query
- Topic 4D: Perform a Calculation on a Record Grouping

### *Lesson 5: Designing Forms*

- Topic 5A: Examine Form Design Guidelines
- Topic 5B: Create a Form Using AutoForm
- Topic 5C: Create a Form Using the Form Wizard
- Topic 5D: Modify the Design of a Form

### *Lesson 6: Producing Reports*

- Topic 6A: Create an AutoReport
- Topic 6B: Create a Report by Using the Wizard
- Topic 6C: Examine a Report in Design View

Topic 6D: Add a Calculated Field to a Report

---

Topic 6E: Modify the Format Properties of a Control

Topic 6F: AutoFormat a Report

Topic 6G: Adjust the Width of a Report





## Microsoft Access Level II

**COURSE DESCRIPTION:** In this course you will consider how to design and create a new Access database, how to customize database components, and how to share Access data with other applications.

**COURSE OBJECTIVE:** You will design and create a new Access database; improve queries, forms, and reports; and integrate Microsoft Office Access with other applications.

**TARGET STUDENT:** One who wishes to learn intermediate-level operations including: creating new databases, tables, and relationships, as well as working with and revising intermediate-level queries, forms, and reports.

**PREREQUISITES:** Access Level 1 (basic familiarity with Access tables, relationships, queries, forms, and reports).

### *Lesson 1: Planning a Database*

Topic 1A: Design a Relational Database

Topic 1B: Identify Database Purpose

Topic 1C: Review Existing Data

Topic 1D: Determine Fields

Topic 1E: Group Fields into Tables

Topic 1F: Normalize the Data

Topic 1G: Designate Primary and Foreign Keys

### *Lesson 2: Building the Structure of a Database Topic*

2A: Create a New Database

Topic 2B: Create a Table Using a Wizard

Topic 2C: Create Tables in Design View

Topic 2D: Create Relationships between Tables

### *Lesson 3: Controlling Data Entry*

Topic 3A: Restrict Data Entry with Field Properties

Topic 3B: Create an Input Mask

Topic 3C: Create a Lookup Field

### *Lesson 4: Finding and Joining Data*

Topic 4A: Find Data with Filters

Topic 4B: Create Query Joins

Topic 4C: Join Unrelated Tables

Topic 4D: Relate Data Within a Table

### *Lesson 5: Creating Flexible Queries*

Topic 5A: Set Select Query Properties

Topic 5B: Create Parameter Queries

Topic 5C: Create Action Queries

### *Lesson 6: Improving Your Forms*

Topic 6A: Enhance the Appearance of a Form

Topic 6B: Restrict Data Entry in Forms

Topic 6C: Add Command Buttons

Topic 6D: Create a Subform

### *Lesson 7: Customizing Your Reports*

Topic 7A: Organize Report Information

---

Topic 7B: Set Report Control Properties

Topic 7C: Control Report Pagination

Topic 7E: Add a Subreport to an Existing Report

Topic 7F: Create Mailing Labels

*Lesson 8: Expanding the Reach of Your Data*

Topic 8A: Publish Access Data as a Word Document

Topic 8B: Analyze Access Data in Excel

Topic 8C: Export Data to a Text File - Topic 8D: Merge Access Data with a Word Document



## Microsoft Access Level III

**Overview:** Students will learn how to use a variety of complex query techniques, create more efficient forms and reports, and create and use macros to automate their forms. In addition, students will gain experience with Internet-related features, including hyperlinks and the Web toolbar.

**Delivery method:** Instructor-led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course content:

#### *Lesson 1: Parameter and action queries*

Creating parameter queries

Creating action queries

#### *Lesson 2: Query joins and crosstab queries*

Joining tables and working with join properties

Creating crosstab queries

Editing limitations in query datasheets

#### *Lesson 3: Using advanced form techniques*

Organizing field placement

Using functions to control data entry

Adding an option group to a form

Using a form as the user interface

Creating a form that contains a subform

#### *Lesson 4: Creating basic macros to automate forms*

Macro basics

Attaching a macro to a command button

Revising a macro

Attaching a macro to an event in a form

#### *Lesson 5: Using macros to provide user interaction and automate tasks*

Using a macro to provide user interaction

Using macros to automate data entry

AutoKeys and AutoExec macros

#### *Lesson 6: Using advanced report techniques*

Customizing the appearance and functionality of a report

Mailing and other types of labels

#### *Lesson 7: Access 2000 and the Internet*

Using hyperlinks

Access tools for working on the Internet

## Microsoft Access – 2007 New Features

**COURSE LENGTH:** 0.5 day(s)

You have worked with Microsoft® Office Access™ 2003 (or earlier), and you now need to be aware of the additional features in the latest release of the software for improving the management, presentation, and distribution of your databases. In this course, you will be introduced to the new features available in Microsoft® Office Access™ 2007.

**Course Objective:** You will explore and use the new and enhanced features of Microsoft® Office Access™ 2007.

**Target Student:** This course is designed for experienced Access users who have worked with earlier versions of Microsoft Access, ideally Microsoft Access 2003, and who have upgraded to Microsoft Access 2007.

**Prerequisites:** Students enrolling in this course should understand how to use some version of Access, preferably 2003 or XP, and have some familiarity with the Internet. This course covers the commonly used new features for a typical user. Due to the nature of this course and the minimal prerequisites, there are other more advanced new features that are not covered in depth.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Exploring the Access Environment*

- Topic 1A: Explore the User Interface
- Topic 1B: Work with the Ribbon
- Topic 1C: Work with Contextual Tabs
- Topic 1D: Customize the Access Environment

#### *Lesson 2: Creating Tables and Forms*

- Topic 2A: Create a Table
- Topic 2B: Create a Form
- Topic 2C: Design a Form Layout

#### *Lesson 3: Creating Queries and Reports*

- Topic 3A: Query a Database
- Topic 3B: Generate Reports
- Topic 3C: Format a Report

#### *Lesson 4: Working with External Data*

- Topic 4A: Import Data
- Topic 4B: Export Data

## Microsoft Advanced

**COURSE OBJECTIVE:** This class will combine knowledge and skills from MS Word, PowerPoint, Excel, Outlook, MS Paint, and Internet Explorer. Excel will consume 95% of the focus in this class. The Learning objective of this class is to consider ways of connecting those tools and skills learned in previous training. Topics to cover include: attaining professional looking results, creating specialized forms, advanced lists,



advance data validation, indirect cell referencing and concatenation, streamlining workflow: command buttons, advance custom number masks, creating a recurring hyperlinked task, email templates, and more. Students will receive an exceptional Reference Sheet of Excel Cheats, Tips, & Tricks.

**TARGET STUDENT:** The Target Audience is those participants who have gone through all 3 levels of Excel and Outlook -- the target student should feel very comfortable moving through Excel in a fast paced and sophisticated manner.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

## Microsoft Excel Level I

- **COURSE OBJECTIVE:** You will create and edit basic Microsoft Office Excel worksheets and workbooks.
- **TARGET STUDENT:** This course is designed for persons who desire to gain the skills necessary to create, edit, format, and print Microsoft Excel worksheets.
- **DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: Getting Started with Excel*

Topic 1A: An Overview of Excel  
Topic 1B: Navigate in Excel  
Topic 1C: Select Data  
Topic 1D: Enter Data  
Topic 1E: Save a Workbook  
Topic 1F: Obtain Help

### *Lesson 2: Modifying a Worksheet*

Topic 2A: Move and Copy Data Between Cells  
Topic 2B: Fill Cells with Series of Data  
Topic 2C: Edit Cell Data  
Topic 2D: Insert and Delete Cells, Columns, and Rows  
Topic 2E: Find, Replace, and Go To Cell Data  
Topic 2F: Spell Check a Worksheet

### *Lesson 3: Performing Calculations*

Topic 3A: Create Basic Formulas  
Topic 3B: Calculate with Functions  
Topic 3C: Copy Formulas and Functions  
Topic 3D: Create an Absolute Reference

### *Lesson 4: Formatting a Worksheet*

Topic 4A: Change Font Size and Type  
Topic 4B: Add Borders and Color to Cells  
Topic 4C: Change Column Width and Row Height  
Topic 4D: Merge Cells  
Topic 4E: Apply Number Formats  
Topic 4F: Create a Custom Number Format  
Topic 4G: Align Cell Contents  
Topic 4H: Find and Replace Formats  
Topic 4I: Apply an AutoFormat  
Topic 4J: Apply Styles

### *Lesson 5: Developing a Workbook*

Topic 5A: Format Worksheet Tabs  
Topic 5B: Reposition Worksheets in a Workbook  
Topic 5C: Insert and Delete Worksheets  
Topic 5D: Copy and Paste Worksheets  
Topic 5E: Copy a Workbook

### *Lesson 6: Printing Workbook Contents*

Topic 6A: Set a Print Title



Topic 6B: Create a Header and a Footer  
Topic 6C: Set Page Margins  
Topic 6D: Change Page Orientation  
Topic 6E: Insert and Remove Page Breaks  
Topic 6F: Print a Range

*Lesson 7: Customizing Layout*

Topic 7A: Split a Worksheet  
Topic 7B: Arrange Worksheets  
Topic 7C: Freeze and Unfreeze Rows and Columns - Topic 7D: Hide and Unhide Worksheets

## Microsoft Excel Level II

**COURSE OBJECTIVE:** You will apply visual elements and advanced formulas to a worksheet to display data in various formats.

**TARGET STUDENT:** The target students for this course are students who desire to gain the skills necessary to create templates, sort and filter data, import and export data, analyze data, and work with Excel on the Web.

**PREREQUISITES:** To ensure your success, we recommend that you have experience with creating, editing, formatting, saving, and printing basic spreadsheets in Microsoft Excel 2003.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: Creating and Applying Templates*

- Topic 1A: Create a Workbook from a Template
- Topic 1B: Create a Custom Template
- Topic 1C: Working with Comments
- Topic 1D: Create a Hyperlink
- Topic 1E: Use Web-based Research Tools

### *Lesson 2: Creating and Modifying Charts*

- Topic 2A: Create a Chart
- Topic 2B: Format Chart Items
- Topic 2C: Change the Chart Type
- Topic 2D: Create a Diagram

### *Lesson 3: Working with Graphic Objects*

- Topic 3A: Insert Graphics
- Topic 3B: Create AutoShapes
- Topic 3C: Format Graphic Objects
- Topic 3D: Change the Order of Graphic Objects
- Topic 3E: Group Graphic Objects
- Topic 3F: Move, Copy, and Resize Graphic Objects

### *Lesson 4: Calculating with Advanced Formulas*

- Topic 4A: Create and Apply a Name for a Range of Cells
- Topic 4B: Calculate Across Worksheets
- Topic 4C: Calculate with Date and Time Functions
- Topic 4D: Calculate with Financial Functions
- Topic 4E: Calculate with Statistical Functions
- Topic 4F: Calculate with Lookup and Reference Functions
- Topic 4G: Calculate with Logical Functions

### *Lesson 5: Sorting and Filtering Data*

- Topic 5A: Sort Data Lists
- Topic 5B: Filter Data Lists
- Topic 5C: Create and Apply Advanced Filters
- Topic 5D: Calculate with Database Functions
- Topic 5E: Add Subtotals to a Worksheet





*Lesson 6: Using Excel with the Web*

Topic 6A: Export Excel Data

Topic 6B: Publish a Worksheet to the Web

Topic 6C: Import Data from the Web

Topic 6D: Create a Web Query

## Microsoft Excel Level III

**COURSE OBJECTIVE:** You will automate some common Excel tasks, apply advanced analysis techniques to more complex data sets, collaborate on worksheets with others, and share Excel data with other applications.

**TARGET STUDENT:** This course was designed for students desiring to gain the skills necessary to create macros, collaborate with others, audit and analyze worksheet data, create PivotTables and PivotCharts, incorporate multiple data sources, and import and export data.

**PREREQUISITES:** To ensure your success, we recommend you first take the following Excel Level 1 and Excel Level 2.

### *Lesson 1: Streamlining Workflow*

- Topic 1A: Create a Macro
- Topic 1B: Edit a Macro
- Topic 1C: Customize Access to Excel Commands
- Topic 1D: Apply Conditional Formatting
- Topic 1E: Add Data Validation Criteria
- Topic 1F: Update a Workbook's Properties
- Topic 1G: Modify Excel's Default Settings

### *Lesson 2: Collaborating with Others*

- Topic 2A: Protect Files
- Topic 2B: Share a Workbook
- Topic 2C: Set Revision Tracking
- Topic 2D: Review Tracked Revisions
- Topic 2E: Merge Workbooks
- Topic 2F: Adjust Macro Settings
- Topic 2G: Administer Digital Signatures

### *Lesson 3: Auditing Worksheets*

- Topic 3A: Trace Cell Precedents
- Topic 3B: Trace Cell Dependents
- Topic 3C: Locate Errors in Formulas
- Topic 3D: Locate Invalid Data and Formulas
- Topic 3E: Watch and Evaluate Formulas
- Topic 3F: Group and Outline Data

### *Lesson 4: Analyzing Data*

- Topic 4A: Create a Trendline
- Topic 4B: Create Scenarios
- Topic 4C: Perform What-If Analysis
- Topic 4D: Develop a PivotTable® Report
- Topic 4E: Develop a PivotChart® Report
- Topic 4F: Perform Statistical Analysis with the Analysis ToolPak

### *Lesson 5: Working with Multiple Workbooks*

- Topic 5A: Create a Workspace
- Topic 5B: Consolidate Data
- Topic 5C: Link Cells in Different Workbooks
- Topic 5D: Edit Links



*Lesson 6: Importing and Exporting Data*

Topic 6A: Export to Microsoft Word

Topic 6B: Import a Word Table

Topic 6C: Import Text Files

*Lesson 7: Structuring XML Workbooks*

Topic 7A: Develop XML Maps

Topic 7B: Import, Add, and Export XML Data

Topic 7C: Manage XML Workbooks    Topic 7D:  
Apply XML View Options

## Excel Level IV

: 1.0 day(s)

You have worked with Microsoft Office Excel and you now need to begin assimilating your knowledge into practical application. Streamline your workflow in Excel by combining knowledges acquired in Levels 1,2, and 3.

**Course Objective:** You will be introduced to exciting and powerful tools in Excel that will help you solve complex problems in Excel.

**Target Student:** This course is designed for experienced Excel users who have worked with and are familiar with all levels of Excel, Word, and Outlook.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

- Advanced Tips, Tricks, & Shortcuts
- Parsing & Extracting with the use of Arrayed Formulas
- Concatenation in the help of normalizing spreadsheet data entry errors
- Indirect Cell Referencing to turn a static spreadsheet into a dynamic interactive spreadsheet
- Math Functions including conversions
- Logic Functions - unique usages
- Time & Date functions - never be confused again
- SumIF: using to replace the DataBase Functions
- Pivot Tables
- Weighted Averages
- Rank Function
- Statistical Averages: Understanding and using Mean, Median, and Mode
- Powerful usage of Form & Control Toolboxes
- Custom Data Validations: Disallowing duplicates in a spreadsheet
- Understanding healthy data entry (Data Base Normalization) in a spreadsheet

In this training, because it is more advanced in nature, we will also look at the following:

*MAXIMIZING WORKFLOW IN THE MICROSOFT OFFICE SUITE:*

EMAIL MAIL MERGE - Outlook/Word/Excel

INSTANT ONE BUTTON TASK W/ AUTO EMAIL - Understanding Office & maximizing workflow: Create a recurring Outlook Task with a Reminder linked to an Email template with attachment and custom fields already filled out

INSTANT FAX COVER PAGE - Auto generate fax cover page in Word with cover letter automatically created.

Of Special Note: Students taking this course will receive a special digital file that will serve as a lifelong reference tool for use in Excel. All lessons in this curriculum are digital and provide real world examples and work arounds.



---

## Microsoft

### COURSE LENGTH

## Microsoft Excel – 2007 New Features

---

**COURSE LENGTH:** 0.5 day(s)

You have worked with Microsoft® Office Excel® 2003, and you now need to be aware of the additional features in the latest release of the software for improving the management, presentation, and distribution of your spreadsheets. In this course, you will work with the new and enhanced features in Microsoft® Office Excel® 2007.

**Course Objective:** You will be introduced to the new features in Microsoft Office Excel 2007.

**Target Student:** This course is designed for experienced Excel users who have worked with earlier versions of Microsoft Office Excel, ideally Microsoft Office Excel 2003, and who have upgraded to Microsoft Office Excel 2007.

**Prerequisites:** Students enrolling in this course should understand how to use some version of Excel, preferably 2003, and have some familiarity with the Internet. This course covers the commonly used new features for a typical user. Due to the nature of this course and the minimal prerequisites, there are other more advanced new features that are not covered in depth.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Exploring the Excel Environment*

- Topic 1A: Explore the User Interface
- Topic 1B: Work with the Ribbon
- Topic 1C: Work with Contextual Tabs
- Topic 1D: Use the Excel Galleries
- Topic 1E: Customize the Excel Interface

#### *Lesson 2: Organizing Data*

- Topic 2A: Explore the Enhancements in Excel 2007 Spreadsheets
- Topic 2B: Insert Tables
- Topic 2C: Format Tables

#### *Lesson 3: Analyzing Data*

- Topic 3A: Apply Conditional Formatting
- Topic 3B: Sort Data in a Spreadsheet
- Topic 3C: Filter Data in a Spreadsheet
- Topic 3D: Apply a Formula

#### *Lesson 4: Presenting Data*

- Topic 4A: Create Charts

Topic 4B: Format Charts  
Topic 4C: Work with Illustrations  
Topic 4D: Create PivotTables and PivotCharts  
Topic 4E: Share Excel Charts  
Topic 4F: Save Data in Presentable Formats

## Excel – 2007 Level I

: 1 day(s)

You have basic computer skills such as using a mouse, navigating through windows, and surfing the Internet. You have also used paper-based systems to store data that you run calculations on. You now want to migrate that data to an electronic format.

**Course Objective:** You will create and edit basic Microsoft® Office Excel® 2007 worksheets and workbooks.

**Target Student:** This course is designed for people preparing for certification as a Microsoft Certified Application Specialist in Excel, who already have knowledge of Microsoft® Office, Windows® 2000 (or above), and who desire to gain the skills necessary to create, edit, format, and print basic Microsoft Office Excel 2007 worksheets.

**Prerequisites:** Students should be familiar with using personal computers and have used a mouse and keyboard. You should be comfortable in the Windows environment and be able to use Windows to manage information on your computer. Specifically, you should be able to launch and close programs; navigate to information stored on the computer; and manage files and folders. Students should have completed the following courses or possess equivalent knowledge before starting with this course:

- Windows XP Professional: Level 1
- Windows XP Professional: Level 2
- Windows XP: Introduction
- Windows 2000: Introduction

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Creating a Basic Worksheet*

Topic 1A: Explore the User Interface and the Ribbon  
Topic 1B: Navigate and Select in Excel  
Topic 1C: Obtain Help  
Topic 1D: Enter Data and Save a Workbook  
Topic 1E: Customize the Quick Access Toolbar

#### *Lesson 2: Performing Calculations*

Topic 2A: Create Basic Formulas  
Topic 2B: Calculate with Functions  
Topic 2C: Copy Formulas and Functions

#### *Lesson 3: Modifying a Worksheet*

Topic 3A: Manipulate Data  
Topic 3B: Insert and Delete Cells, Columns, and Rows  
Topic 3C: Search for Data in a Worksheet  
Topic 3D: Spell Check a Worksheet



---

## Microsoft

### COURSE LENGTH

#### *Lesson 4: Formatting a Worksheet*

- Topic 4A: Modify Fonts
- Topic 4B: Add Borders and Color to Cells
- Topic 4C: Change Column Width and Row Height
- Topic 4D: Apply Number Formats
- Topic 4E: Position Cell Contents
- Topic 4F: Apply Cell Styles

#### *Lesson 5: Printing Workbook Contents*

- Topic 5A: Print Workbook Contents Using Default Print Options
- Topic 5B: Set Print Options
- Topic 5C: Set Page Breaks

#### *Lesson 6: Managing Large Workbooks*

- Topic 6A: Format Worksheet Tabs
- Topic 6B: Manage Worksheets in a Workbook
- Topic 6C: Manage the View of Large Worksheets

## Excel – 2007 Level II

: 1 day(s)

In Microsoft® Office Excel® 2007: Level 1, you created, edited, formatted, and printed basic spreadsheets. You now have a need to streamline repetitive tasks and display spreadsheet data in more visually effective ways. In this course, you will use Microsoft Office Excel 2007 to streamline and enhance your spreadsheets with templates, charts, graphics, and formulas.

**Course Objective:** You will apply visual elements and advanced formulas to a worksheet to display data in various formats.

**Target Student:** The target students for this course are students who desire to gain the skills necessary to create templates, sort and filter data, import and export data, analyze data, and work with Excel on the web. In addition, this course helps prepare students who desire to take the Microsoft Office Specialist exam in Excel and who already have knowledge of the basics of Excel, including how to create, edit, format, and print basic worksheets.

**Prerequisites:** Before starting this course, students are recommended to take the following Element K course or possess equivalent knowledge: Microsoft Office Excel 2007: Level 1.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Calculating Data with Advanced Formulas Topic*

- 1A: Manage Cell and Range Names
- Topic 1B: Calculate Data Across Worksheets
- Topic 1C: Use Specialized Functions
- Topic 1D: Analyze Data with Logical and Lookup Functions

#### *Lesson 2: Organizing Worksheet and Table Data*

- Topic 2A: Create and Modify Tables
- Topic 2B: Format Tables
- Topic 2C: Sort or Filter Worksheet or Table Data
- Topic 2D: Calculate Data in a Table or Worksheet

#### *Lesson 3: Presenting Data Using Charts*

- Topic 3A: Create a Chart
- Topic 3B: Modify Charts
- Topic 3C: Format Charts

#### *Lesson 4: Analyzing Data Using PivotTables and PivotCharts*

- Topic 4A: Create a PivotTable Report
- Topic 4B: Analyze Data Using PivotCharts

#### *Lesson 5: Inserting Graphic Objects*

- Topic 5A: Insert and Modify Pictures and ClipArt
- Topic 5B: Draw and Modify Shapes
- Topic 5C: Illustrate Workflow Using SmartArt Graphics
- Topic 5D: Layer and Group Graphic Objects

#### *Lesson 6: Customizing and Enhancing Workbooks and the Excel Environment*

- Topic 6A: Customize the Excel Environment
- Topic 6B: Customize Workbooks





---

## Microsoft

### COURSE LENGTH

Topic 6C: Manage Themes

Topic 6D: Create and Use Templates

## Microsoft Excel – 2007 Level III

**COURSE LENGTH:** 1 day(s)

Your training in and use of Microsoft® Office Excel® 2007 has provided you with a solid foundation in the basic and intermediate skills for working in Excel. You have used Excel to perform tasks such as running calculations on data and sorting and filtering numeric data. In this course, you will extend your knowledge into some of the more specialized and advanced capabilities of Excel by automating some common tasks, applying advanced analysis techniques to more complex data sets, collaborating on worksheets with others, and sharing Excel data with other applications.

**Course Objective:** You will automate some common Excel tasks, apply advanced analysis techniques to more complex data sets, collaborate on worksheets with others, and share Excel data with other applications.

**Target Student:** This course was designed for students desiring to gain the skills necessary to create macros, collaborate with others, audit and analyze worksheet data, incorporate multiple data sources, and import and export data. In addition, the course is also for students desiring to prepare for the Microsoft Certified Application Specialist exam in Microsoft® Office Excel® 2007, and who already have knowledge of the basics of Excel, including how to create, edit, format, and print worksheets that include charts and sorted and filtered data.

**Prerequisites:** To ensure your success, we recommend you first take the following Element K courses or have equivalent knowledge:

- Microsoft® Office Excel® 2007 Level 1
- Microsoft® Office Excel® 2007 Level 2

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Streamlining Workflow*

- Topic 1A: Create a Macro
- Topic 1B: Edit a Macro
- Topic 1C: Apply Conditional Formatting
- Topic 1D: Add Data Validation Criteria
- Topic 1E: Update a Workbook's Properties
- Topic 1F: Modify Excel's Default Settings

#### *Lesson 2: Collaborating with Others*

- 2A: Protect Files
- Topic 2B: Share a Workbook
- Topic 2C: Set Revision Tracking
- Topic 2D: Review Tracked Revisions
- Topic 2E: Merge Workbooks
- Topic 2F: Administer Digital Signatures
- Topic 2G: Restrict Document Access

#### *Lesson 3: Auditing Worksheets*

- Topic 3A: Trace Cells
- Topic 3B: Troubleshoot Errors in Formulas
- Topic 3C: Troubleshoot Invalid Data and Formulas
- Topic 3D: Watch and Evaluate Formulas
- Topic 3E: Create a Data List Outline

#### *Lesson 4: Analyzing Data*



Topic 4A: Create a Trendline  
Topic 4B: Create Scenarios  
Topic 4C: Perform What-If Analysis  
Topic 4D: Perform Statistical Analysis with the Analysis ToolPak

*Lesson 5: Working with Multiple Workbooks* Topic

5A: Create a Workspace  
Topic 5B: Consolidate Data  
Topic 5C: Link Cells in Different Workbooks  
Topic 5D: Edit Links

*Lesson 6: Importing and Exporting Data* Topic

6A: Export Excel Data  
Topic 6B: Import a Delimited Text File

*Lesson 7: Using Excel with the Web*

Topic 7A: Publish a Worksheet to the Web  
Topic 7B: Import Data from the Web  
Topic 7C: Create a Web Query

*Lesson 8: Structuring Workbooks with XML* Topic

8A: Develop XML Maps  
Topic 8B: Import and Export XML Data

## Microsoft Outlook Level I

---

**COURSE OBJECTIVE:** You will compose and send email, schedule appointments and meetings, manage contact information and tasks, and use notes.

### *Lesson 1: Getting Started with Outlook*

- Topic 1A: Log On to Outlook
- Topic 1B: The Outlook Environment
- Topic 1C: Compose and Send a Simple Message
- Topic 1D: Open a Message
- Topic 1E: Reply to a Message
- Topic 1F: Print a Message
- Topic 1G: Delete a Message

### *Lesson 2: Composing Messages*

- Topic 2A: Address a Message
- Topic 2B: Format a Message
- Topic 2C: Check Spelling and Grammar
- Topic 2D: Attach a File
- Topic 2E: Forward a Message

### *Lesson 3: Managing Mail*

- Topic 3A: Open and Save an Attachment
- Topic 3B: Flag a Message
- Topic 3C: Create a Folder
- Topic 3D: Move Messages to a Folder
- Topic 3E: Copy Messages to Folders
- Topic 3F: Delete a Folder

### *Lesson 4: Scheduling Appointments*

- Topic 4A: The Outlook Calendar
- Topic 4B: Schedule an Appointment
- Topic 4C: Assign a Category to an Appointment
- Topic 4D: Update Calendar Entries

### *Lesson 5: Scheduling Meetings*

- Topic 5A: Schedule a Meeting
- Topic 5B: Reply to a Meeting Request
- Topic 5C: Propose a New Meeting Time
- Topic 5D: Track Meeting Responses
- Topic 5E: Update a Meeting Request
- Topic 5F: Cancel a Meeting Request
- Topic 5G: Print the Calendar

### *Lesson 6: Managing Contacts*

- Topic 6A: Add a Contact
- Topic 6B: Sort Contacts
- Topic 6C: Find a Contact
- Topic 6D: Generate a Map
- Topic 6E: Edit a Contact
- Topic 6F: Delete a Contact
- Topic 6G: Print Contacts



*Lesson 7: Managing Tasks*

Topic 7A: Create a Task

Topic 7B: Edit a Task

Topic 7C: Update a Task

*Lesson 8: Using Notes* Topic 8A:

Create a Note

Topic 8B: Edit a Note - Topic 8C: Copy a Note

## Microsoft Outlook Level II

---

**COURSE OBJECTIVE:** You will customize your environment, calendar, and mail messages to meet your specific needs as well as track, share, assign, and quickly locate various Outlook items.

**TARGET STUDENT:** This course is designed for experienced Outlook users who need to learn how to customize their environment, calendar, and mail messages to meet their specific needs and who wish to track, share, assign, and quickly locate various Outlook items.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: Tracking Work Activities Using the Journal*

Topic 1A: Record a Journal Entry Automatically

Topic 1B: Manually Record a Journal Entry

Topic 1C: Modify a Journal Entry

### *Lesson 2: Setting Calendar Options*

Topic 2A: Set Work Days and Times

Topic 2B: Display Other Time Zones

Topic 2C: Set Free/Busy Options

### *Lesson 3: Setting Message Options*

Topic 3A: Modify Message Settings

Topic 3B: Modify Delivery Options

Topic 3C: Modify Message Formats

Topic 3D: Notify Others that You will be Out of the Office

Topic 3E: Create and Modify a Distribution List

Topic 3F: Insert a Hyperlink

### *Lesson 4: Sharing Folder Information*

Topic 4A: Specify Folder Permissions

Topic 4B: Access Another User's Folder

Topic 4C: Delegate Access To Folders

### *Lesson 5: Managing Tasks*

Topic 5A: Assign a Task

Topic 5B: Reply to a Task Request

Topic 5C: Send a Task Update

Topic 5D: Track Assigned Tasks

### *Lesson 6: Customizing Outlook*

Topic 6A: Customize the Toolbar

Topic 6B: Create a New Toolbar

Topic 6C: Customize the Menu

Topic 6D: Create a Folder Home Page

### *Lesson 7: Locating Outlook Items*

Topic 7A: Sort Messages Using Multiple Criteria

Topic 7B: Find Messages

Topic 7C: Find Messages Using Multiple Criteria

Topic 7D: Filter Messages



Topic 7E: Organize Messages  
Topic 7F: Manage Junk Email

## Microsoft Outlook Level III

**COURSE DESCRIPTION:** It builds on the email and calendaring skills you've already obtained and will provide you with the skills needed to communicate in real time with other users, personalize mail, organize items, share and link contacts, create forms, and work offline and remotely.

**COURSE OBJECTIVE:** You will communicate using Instant Messaging, personalize and organize your mail, organize Outlook items, share and link contacts, create forms, and work offline and remotely.

**TARGET STUDENT:** Persons with an intermediate understanding of Outlook who need to use Outlook to communicate using Instant Messaging, personalize and organize their mail, organize Outlook items, share and link contacts, create forms, and work offline and remotely.

**PREREQUISITES:** This course assumes a working knowledge of Outlook Levels 1 & 2.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: Communicating Using MSN Messenger*

- Topic 1A: Obtain a Hotmail Account
- Topic 1B: Add Contacts
- Topic 1C: Send and Receive Instant Messages
- Topic 1D: Attach a File
- Topic 1E: Change MSN Messenger Status
- Topic 1F: Change MSN Messenger Options

### *Lesson 2: Personalizing Your Mail*

- Topic 2A: Use Stationery
- Topic 2B: Create Custom Stationery
- Topic 2C: Create Signatures
- Topic 2D: Modify Signatures

### *Lesson 3: Organizing Outlook Items*

- Topic 3A: Group Items
- Topic 3B: Create Search Folders
- Topic 3C: Create Rules
- Topic 3D: Apply Conditional Formatting

### *Lesson 4: Working with Contacts*

- Topic 4A: Forward Contacts
- Topic 4B: Create a vCard from a Contact
- Topic 4C: Export Contacts
- Topic 4D: Perform a Mail Merge
- Topic 4E: Link Items to a Contact

### *Lesson 5: Saving and Archiving Mail*

- Topic 5A: Save Messages in Alternate Formats

Topic 5B: Archive Messages

---

Topic 5C: Protect Personal Folders

*Lesson 6: Creating a Custom Form*

Topic 6A: Add Form Fields

Topic 6B: Save a Form

Topic 6C: Test a Form

*Lesson 7: Working Offline and Remotely*

Topic 7A: Create an Offline Folder File

Topic 7B: Make a Folder Available Offline

Topic 7C: Create a Send/Receive Group

Topic 7D: Download Messages





## Microsoft Outlook – 2007 New Features

---

**COURSE LENGTH:** 0.5 day(s)

After having worked with Microsoft® Office Outlook® 2003, you must also get to know the features present in the latest release of the application. Microsoft® Office Outlook® 2007 comes with new features for improving the management, organization, and distribution of your Outlook items. In this course, you will work with the new and enhanced features in Outlook 2007.

**Course Objective:** You will work with the new features of Microsoft® Office Outlook® 2007

**Target Student:** The course is designed for experienced Outlook users who need to learn about the new features 2007 has to offer versus the 2003 version.

**Prerequisites:** Prior knowledge of Microsoft® Office Outlook® 2003.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Exploring the Outlook Environment*

- Topic 1A: Explore the User Interface
- Topic 1B: Work with the Ribbon
- Topic 1C: Work with Contextual Tools
- Topic 1D: Customize the Calendar Views

#### *Lesson 2: Managing Your Daily Tasks in Outlook 2007*

- Topic 2A: Work with Mail Messages
- Topic 2B: Manage Tasks in the Calendar
- Topic 2C: Locate Information Quickly
- Topic 2D: Schedule a Meeting

#### *Lesson 3: Sharing Information with Other Users*

- Topic 3A: Share Your Calendar Information
- Topic 3B: Notify Others That You Will be Out Of Office
- Topic 3C: Share Information Using Electronic Business Card

#### *Lesson 4: Protecting Your Information*

- Topic 4A: Manage Junk Email
- Topic 4B: Authorize Users to Access Your Information
- Topic 4C: Recover Your Work

#### *Lesson 5: Integrating Outlook with Other Applications*

- Topic 5A: Integrate Outlook with Microsoft Office InfoPath 2007
- Topic 5B: Integrate Outlook with Windows SharePoint Services
- Topic 5C: Add RSS Feeds Through Outlook 2007
- Topic 5D: Publish the File in PDF or XPS File Format

## Microsoft PowerPoint Level I

---

**COURSE OBJECTIVE:** Create effective basic PowerPoint presentations for delivery in front of an audience.

### *Lesson 1: An Orientation to PowerPoint Topic*

- 1A: The PowerPoint Environment
- Topic 1B: Orientation to Views
- Topic 1C: Navigate Through a Presentation
- Topic 1D: Edit Slide Text
- Topic 1E: Save the Presentation
- Topic 1F: Run a Slide Show

### *Lesson 2: Beginning a Presentation*

- Topic 2A: Create a New Presentation
- Topic 2B: Change Background Color
- Topic 2C: Add Slides to a Presentation
- Topic 2D: Enter Text
- Topic 2E: Create a Presentation from a Microsoft Word Outline

### *Lesson 3: Formatting Text Slides*

- Topic 3A: Apply Character Formats
- Topic 3B: Align Text
- Topic 3C: Change Line Spacing
- Topic 3D: Change Indents

### *Lesson 4: Adding Tables to a Presentation*

- Topic 4A: Create a Table
- Topic 4B: Format Tables
- Topic 4C: Insert a Table from Microsoft Word

### *Lesson 5: Charting Data*

- Topic 5A: Create a Column Chart
- Topic 5B: Edit Chart Data
- Topic 5C: Change Chart Type
- Topic 5D: Insert a Chart from Microsoft Excel

### *Lesson 6: Modifying Objects*

- Topic 6A: Resize Objects
- Topic 6B: Copy and Duplicate Objects
- Topic 6C: Move Objects
- Topic 6D: Changing Object Orientation
- Topic 6E: Format Objects
- Topic 6F: Group and Ungroup Objects
- Topic 6G: Change the Order of Objects

### *Lesson 7: Adding Images to a Presentation Topic*

- 7A: Add Clip Art
- Topic 7B: Add a Picture from a File
- Topic 7C: Draw Lines and Shapes
- Topic 7D: Insert WordArt

### *Lesson 8: Preparing to Deliver a Presentation*



Topic 8A: Spell Check  
Topic 8B: Arrange Slides  
Topic 8C: Add Transitions  
Topic 8D: Create Speaker Notes  
Topic 8E: Send a Presentation to Microsoft Word  
Topic 8F: Print the Presentation  
Topic 8G: Package a Presentation for CD

## Microsoft PowerPoint Level II

---

**COURSE DESCRIPTION:** Enhance presentations with features that will transform basic presentations into those with a powerful means of communication.

**COURSE OBJECTIVE:** Draw, animate, and format presentations with professional-quality content such that they may be communicated to a wide variety of live, remote, and self-service audiences.

**TARGET STUDENT:** This course is designed for students who desire to gain the skills necessary to work with design templates, organizational charts, special effects, Web presentations, collaboration functionality, and advanced presentation delivery, or students who desire to prepare for the Microsoft Office Specialist exam in Microsoft® PowerPoint® and who already have knowledge of the basics of Microsoft® PowerPoint® 2003, including slide formatting, working with tables, images, and objects, charting data, and presentation preparation.

### *Lesson 1: Creating a Custom Design Template*

- Topic 1A: Define Design Template Characteristics
- Topic 1B: Create a Custom Color Scheme
- Topic 1C: Set Up a Slide Master
- Topic 1D: Format Custom Bullets
- Topic 1E: Add a Footer
- Topic 1F: Modify the Notes Master
- Topic 1G: Save a Custom Design Template

### *Lesson 2: Adding Organization Charts and Diagrams*

- Topic 2A: Working with Organization Charts
- Topic 2B: Update an Organization Chart
- Topic 2C: Applying a Chart Layout
- Topic 2D: Create a Diagram
- Topic 2E: Draw a Flowchart

### *Lesson 3: Adding Special Effects*

- Topic 3A: Add Sound and Movies
- Topic 3B: Add Animation
- Topic 3C: Emphasize Objects
- Topic 3D: Set a Motion Path
- Topic 3E: Set the Order of Effects

### *Lesson 4: Creating Web Presentations*

- Topic 4A: Create a Group Home Page with the AutoContent Wizard
- Topic 4B: Hyperlink to a Web Page
- Topic 4C: Publish as a Web Page

### *Lesson 5: Collaborating in PowerPoint*

- Topic 5A: Set Password Protection
- Topic 5B: Work with Comments
- Topic 5C: Send a Presentation for Review
- Topic 5D: Merge Revision Copies
- Topic 5E: Apply Reviewer Changes

### *Lesson 6: Delivering a Presentation*

- Topic 6A: Hyperlink Within PowerPoint
- Topic 6B: Add an Action Button



Topic 6C: Set Up a Custom Show

Topic 6D: Annotate a Presentation

Topic 6E: Working with Narrations and Slide Timings

Topic 6F: Set Up a Slide Show to Repeat Automatically

## Microsoft PowerPoint – 2007 New Features

---

**COURSE LENGTH:** 0.5 day(s)

**Course Description:** You have worked with Microsoft® Office PowerPoint® 2003 (or earlier) to create presentations. PowerPoint 2007, with its redesigned interface, enhanced features, and results-oriented authoring tools, improves the process of creating dynamic presentations. In this course, you will work with the new and enhanced features available in Microsoft® Office PowerPoint® 2007.

**Course Objective:** You will explore the components of the results-oriented interface of the PowerPoint environment and customize the interface to suit your requirements. You will identify and use the new and enhanced features of PowerPoint 2007 to create dynamic and visually appealing presentations. You will then finalize a presentation and secure it with a digital signature to authenticate its validity.

**Target Student:** This course is designed for experienced PowerPoint users who have worked with earlier versions of Microsoft® Office PowerPoint®, ideally Microsoft® Office PowerPoint® 2003, and who have upgraded to Microsoft® Office PowerPoint® 2007.

**Prerequisites:** Students enrolling in this course should understand how to use a version of PowerPoint, preferably 2003 or XP, and have some familiarity with the Internet. This course covers the commonly used new features for a typical user. Due to the nature of this course and the minimal prerequisites, there are other more advanced new features that are not covered in depth.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Exploring the PowerPoint Environment*

- Topic 1A: Explore the User Interface
- Topic 1B: Work with the Ribbon
- Topic 1C: Work with Contextual Tabs
- Topic 1D: Use the PowerPoint Galleries
- Topic 1E: Customize the PowerPoint Interface

#### *Lesson 2: Enhancing the Presentation Layouts*

- Topic 2A: Create Custom Slide Layouts
- Topic 2B: Work with Themes

#### *Lesson 3: Creating Dynamic Presentations*

- Topic 3A: Apply Rich Text and Typography Effects
- Topic 3B: Enhance Presentations with Graphic Effects
- Topic 3C: Enhance Table Layout
- Topic 3D: Work with Charts

#### *Lesson 4: Finalizing the Presentation*

- Topic 4A: Customize Slide Shows
- Topic 4B: Secure Presentations
- Topic 4C: Save a Presentation



## Microsoft Word Level I

**COURSE OBJECTIVE:** You will create, edit, and enhance standard business documents using Microsoft Office Word 2003.

**TARGET STUDENT:** Persons with a basic understanding of Microsoft Windows who need to learn how to use Microsoft Word to create, edit, format, lay out, and print standard business documents complete with tables and graphics.

### *Lesson 1: Creating a Basic Document*

#### *Lesson 2: Editing a Document*

- Topic 2A: Navigate in a Document
- Topic 2B: Insert Text
- Topic 2C: Select Text
- Topic 2D: Create an AutoText Entry
- Topic 2E: Move and Copy Text
- Topic 2F: Delete Blocks of Text
- Topic 2G: Undo Changes
- Topic 2H: Find and Replace Text

#### *Lesson 3: Formatting Text*

- Topic 3A: Change Font and Size
- Topic 3B: Apply Font Styles and Effects
- Topic 3C: Change Text Color
- Topic 3D: Highlight Text
- Topic 3E: Copy Formats
- Topic 3F: Clear Formatting
- Topic 3G: Find and Replace Text Formatting

#### *Lesson 4: Formatting Paragraphs*

- Topic 4A: Set Tabs
- Topic 4B: Change Paragraph Alignment
- Topic 4C: Indent Paragraphs
- Topic 4D: Add Borders and Shading
- Topic 4E: Apply Styles
- Topic 4F: Create Lists
- Topic 4G: Change Spacing Between Paragraphs and Lines

#### *Lesson 5: Proofing a Document*

- Topic 5A: Use the Thesaurus
- Topic 5B: Check Spelling and Grammar
- Topic 5C: Create a New Default Dictionary
- Topic 5D: Check Word Count
- Topic 5E: Modify a Document in Print Preview

#### *Lesson 6: Adding Tables*

- Topic 6A: Create a Table
- Topic 6B: Enter Data in a Table
- Topic 6C: AutoFormat a Table
- Topic 6D: Convert Text into a Table

---

## Microsoft Word Level I

### *Lesson 7: Inserting Graphic Elements*

Topic 7A: Insert Symbols and Special Characters

Topic 7B: Insert a Clip Art Picture

Topic 7C: Add a Watermark

### *Lesson 8: Controlling Page Appearance*

Topic 8A: Set Page Orientation

Topic 8B: Change Page Margins

Topic 8C: Apply a Page Border

Topic 8D: Add Headers and Footers - Topic 8E: Insert a Page Break





## Microsoft Word Level II

**COURSE DESCRIPTION:** Add components such as customized lists, tables, charts, and graphics. You will also create personalized Microsoft® Word efficiency tools.

**PREREQUISITES:** Students should be able to use Word to create, edit, format, save, and print basic business documents that contain text, basic tables, and simple graphics.

**DELIVERY METHOD:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### *Lesson 1: Managing Lists*

- Topic 1A: Sort a List
- Topic 1B: Restart a List
- Topic 1C: Create an Outline Numbered List
- Topic 1D: Customize List Appearance

### *Lesson 2: Customizing Tables and Charts*

- Topic 2A: Sort a Table
- Topic 2B: Modify Table Structure
- Topic 2C: Merge or Split Cells
- Topic 2D: Position Text in a Table Cell
- Topic 2E: Apply Borders and Shading
- Topic 2F: Perform Calculations in a Table
- Topic 2G: Create a Chart from a Word Table
- Topic 2H: Modify a Chart

### *Lesson 3: Customizing Formatting*

- Topic 3A: Modify Character Spacing
- Topic 3B: Add Text Effects
- Topic 3C: Control Paragraph Flow

### *Lesson 4: Working with Custom Styles*

- Topic 4A: Create a Character or Paragraph Style
- Topic 4B: Modify an Existing Style
- Topic 4C: Create a List Style
- Topic 4D: Create a Table Style

### *Lesson 5: Modifying Pictures*

- Topic 5A: Set Picture Contrast or Brightness
- Topic 5B: Crop a Picture
- Topic 5C: Wrap Text Around a Picture

### *Lesson 6: Creating Customized Graphic Elements*

- Topic 6A: Draw Shapes and Lines
- Topic 6B: Insert WordArt
- Topic 6C: Insert Text Boxes
- Topic 6D: Create Diagrams

---

## Microsoft Word Level I

### *Lesson 7: Controlling Text Flow*

Topic 7A: Insert Section Breaks

Topic 7B: Insert Columns

Topic 7C: Link Text Boxes

### *Lesson 8: Automating Common Tasks*

Topic 8A: Run a Macro

Topic 8B: Create a Macro

Topic 8C: Modify a Macro

Topic 8D: Customize Toolbars and Buttons

Topic 8E: Add Menu Items

### *Lesson 9: Automating Document Creation*

Topic 9A: Create a Document Based on a Template

Topic 9B: Create a Document by Using a Wizard

Topic 9C: Create or Modify a Template

Topic 9D: Change the Default Template Location

Topic 9E: Insert a MacroButton Field in a Template

### *Lesson 10: Performing Mail Merges*

Topic 10A: The Mail Merge Process

Topic 10B: Perform a Merge on Existing Documents

Topic 10C: Merge Envelopes and Labels

Topic 10D: Use Word to Create a Data Source



## Microsoft Word Level III

**COURSE OBJECTIVE:** You will create, manage, revise, and distribute long documents, forms, and Web pages.

**PREREQUISITES:** Students should be able to use Word to create, edit, format, save, and print business documents that contain text, tables, and graphics. Students should also be able to use a Web browser and an email program. A basic understanding of XML would also be helpful. In order to understand how Word interacts with other applications in the Microsoft Office System, students should have a basic understanding of how worksheets and presentations work.

### *Lesson 1: Using Microsoft Office Word with Other Programs*

- Topic 1A: Link to a Microsoft® Office Excel Worksheet
- Topic 1B: Link a Chart to Excel Data
- Topic 1C: Send a Document Outline to PowerPoint
- Topic 1D: Extract Text from a Fax
- Topic 1E: Save a Document as a Different File Format
- Topic 1F: Look Up Information Using Research Sites
- Topic 1G: Send a Document as an Email Attachment

### *Lesson 2: Collaborating on Documents*

- Topic 2A: Modify User Information
- Topic 2B: Create a New Version of a Document
- Topic 2C: Delete Old Versions
- Topic 2D: Send a Document for Review
- Topic 2E: Use Comments
- Topic 2F: Compare Document Changes
- Topic 2G: Merge Document Changes
- Topic 2H: Review a Document

### *Lesson 3: Adding Reference Marks and Notes*

- Topic 3A: Insert Bookmarks
- Topic 3B: Insert Footnotes and Endnotes
- Topic 3C: Add Captions
- Topic 3D: Insert Cross-references

### *Lesson 4: Making Long Documents Easier to Use*

- Topic 4A: Mark Text for Indexing
- Topic 4B: Insert an Index
- Topic 4C: Insert a Table of Figures
- Topic 4D: Mark Text for a Table of Authorities
- Topic 4E: Insert a Table of Authorities
- Topic 4F: Insert a Table of Contents
- Topic 4G: Create a Master Document
- Topic 4H: Automatically Summarize a Document

### *Lesson 5: Securing a Document*

- Topic 5A: Update a Document's Properties
- Topic 5B: Save a Document without Personal Information
- Topic 5C: Hide Text
- Topic 5D: Limit Formatting Choices in a Document
- Topic 5E: Select Regions of a Document that Can Be Modified
- Topic 5F: Add a Digital Signature to a Document



---

## Microsoft Word Level I

Topic 5G: Require a Password to Open a Document

### *Lesson 6: Creating Web Pages*

Topic 6A: Create a Web Page

Topic 6B: Insert Hyperlinks

Topic 6C: Insert a Movie Clip into a Web Page

Topic 6D: Apply a Theme to a Web Page

Topic 6E: Create a Framed Web Page

Topic 6F: Save a Web Page to a Web Server

### *Lesson 7: Creating Forms*

Topic 7A: Add Form Fields to a Document

Topic 7B: Protect a Form

Topic 7C: Save Form Data as Plain Text

Topic 7D: Automate a Form

### *Lesson 8: Using XML in Word* Topic 8A: Tag

an Existing Document

Topic 8B: Save a Document as XML

Topic 8C: Transform an XML Document



## Microsoft Word – 2007 New Features

**COURSE LENGTH:** 0.5 day(s)

**Course Description:** In the past, you have extensively used Microsoft® Office Word 2003 to author and format content and graphics within documents. Word 2007 with its new features, user-friendly formatting, design, and authoring tools, improves the process of document creation and distribution. In this course, you will be introduced to the new and enhanced features available in Microsoft Office Word 2007.

**Course Objective:** You will explore the components of the results-oriented interface of the Word environment and customize the interface to suit your requirements. You will then use the tools available in Word 2007 to create documents that look professional and also visually appealing. You will then compare different versions of a document, in addition to finalizing and securing your document before it reaches its target audience.

**Target Student:** This course is designed for experienced Word users who have worked with earlier versions of Microsoft® Office Word, ideally Microsoft® Office Word 2003, and who have upgraded to Microsoft Office Word 2007.

**Prerequisites:** Students enrolling in this course should understand how to use some version of Word, preferably 2003, and have some familiarity with the Internet. This course covers the commonly used new features for a typical user. Due to the nature of this course and the minimal prerequisites, there are other more advanced new features that are not covered in depth.

**Delivery Method:** Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

### Course Content:

#### *Lesson 1: Exploring the Word Environment*

- Topic 1A: Explore the User Interface
- Topic 1B: Work with the Ribbon
- Topic 1C: Work with Contextual Tabs
- Topic 1D: Use the Word Galleries
- Topic 1E: Customize the Word Interface

#### *Lesson 2: Creating Professional-Looking Documents*

- Topic 2A: Apply Styles
- Topic 2B: Apply Document Themes
- Topic 2C: Add Building Blocks
- Topic 2D: Work with Illustrations
- Topic 2E: Build an Equation
- Topic 2F: Add Citations and a Bibliography

#### *Lesson 3: Finalizing Documents*

- Topic 3A: Compare Reviewed Documents
- Topic 3B: Inspect Documents

## Microsoft XP Pro Level I

---

**COURSE DESCRIPTION:** This course provides a broad foundation for students so that they will have a greater awareness and confidence using personal computers. Students will gain practical information and skills, such as what a computer is, how to manage personal files and folders that they create, and how to use many of the programs that come with Windows XP.

**PERFORMANCE-BASED OBJECTIVES:**

- Use fundamental personal computing terminology.
- Use fundamental Windows XP skills.
- Use Windows Explorer to manage files and folders.
- Use common Windows XP program techniques by working with several programs at the same time.

*Lesson 1: Getting Started with Personal Computers*

Topic 1A: Uses of Personal Computers

Topic 1B: Types of Personal Computers

Topic 1C: Common Computer Components

Topic 1D: How Personal Computers Work

Topic 1E: Start the PC

*Lesson 2: Using a Personal Computer*

Topic 2A: Log On to a PC

Topic 2B: Explore the Desktop with the Mouse

Topic 2C: Manipulate Open Windows

Topic 2D: Use Help And Support

Topic 2E: Adjust the Mouse

*Lesson 3: Managing Folders and Files*

Topic 3A: Folder and File Organization

Topic 3B: Access the Windows Explorer

Topic 3C: Use the Search Companion

Topic 3D: Work with Folders

Topic 3E: Work with Files

Topic 3F: Create Shortcuts

Topic 3G: Use the Recycle Bin

*Lesson 4: Using Programs at the Same Time*

Topic 4A: Create a Document in WordPad

Topic 4B: Use the Address Book

Topic 4C: Format Text



Topic 4D: Use the Calculator  
Topic 4E: Customize a Logo in Paint  
Topic 4F: Turn Off the Computer

## **APPENDIX A: Windows XP Keyboard Shortcuts**

### **Microsoft XP Pro Level II**

**COURSE DESCRIPTION:** This course provides a broad foundation for students so that they will have a greater awareness and confidence using personal computers. Students will share files and resources with coworkers over a network. They will explore how Windows XP takes advantage of the Internet. Lastly, students will learn how to customize and maintain their computers to create the most efficient workspace possible. In general, this course may enable students to participate in conversations, make appropriate requests, and troubleshoot problems related to personal computers.

#### **PERFORMANCE-BASED OBJECTIVES:**

- Customize the Windows XP environment.
- Share files, folders, and resources over a network.
- Access the Internet using Windows XP programs.
- Use Windows XP tools to maintain the computer.

#### *Lesson 1: Customizing Windows XP Topic*

1A: Apply a Theme  
Topic 1B: Customize the Desktop  
Topic 1C: Select a Screen Saver  
Topic 1D: Modify Appearance and Effects  
Topic 1E: Control the Start Menu  
Topic 1F: Customize the Taskbar

#### *Lesson 2: Making Connections*

Topic 2A: An Overview of Networks  
Topic 2B: Add a Printer  
Topic 2C: Manage Print Jobs  
Topic 2D: Share Files  
Topic 2E: Work Remotely

#### *Lesson 3: Using Windows XP and the Internet*

Topic 3A: An Overview of the Internet  
Topic 3B: Search the Internet  
Topic 3C: Keep Windows XP Up-to-date  
Topic 3D: Communicate with Windows Messenger  
Topic 3E: Use Remote Assistance

#### *Lesson 4: Maintaining the Computer*

Topic 4A: Diagnose System Problems

---

Topic 4B: Clean Up the Hard Disk

Topic 4C: Defragment the Hard Disk

Topic 4D: Back Up and Restore Personal Files Topic

4E: Restore System Files

## Photography

---

Classes available for all aspects of photography from the mechanics of 35mm photography, composition & lighting, to post production in Photoshop.

Professional photo shoots for Vitas, promotional & marketing, or any other professional use is also available.







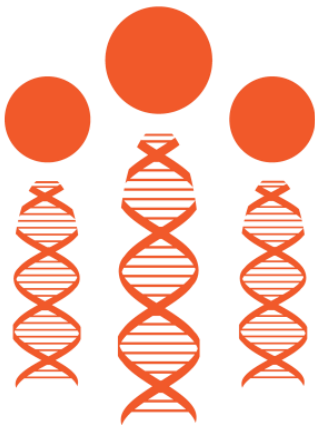
# Notes

---



# YOU. Only Better.® identity intelligence®

---



**YOUNGADULT**coaching

**YOU. Only Better.™**



**LEADERSHIP**coaching

**Unleash Your Potential.**



**ROUNDTABLE**coaching

**Business Success.  
Life Significance.**

