

2023

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# TRAINING WORKSHOPS CATALOG

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# DIRECTORY

<b>SALES &amp; MARKETING</b> .....	6
Call Center Training.....	7
Coaching Sales People .....	8
Customer Service Training .....	9
Creating a Great Webinar .....	10
Event Planning .....	11
High Performance Teams In Your Company.....	12
<b>IN-PERSON SALES</b> .....	13
Media & Public Relations .....	14
Motivating Your Sales Team.....	15
Multi-Level Marketing .....	16
Overcoming Sales Objections.....	17
Presentation Skills .....	18
Proposal Writing.....	19
Telephone & Cell Etiquette.....	20
Top 10 Sales Secrets.....	21
<b>ADMINISTRATIVE SKILLS</b> .....	22
Administrative Office Procedures.....	23
Administrative Support .....	24
Basic Accounting.....	25
Business Writing .....	26
Executive & Personal Assistants .....	27
Organizational Skills .....	28
Social Media in the Workplace.....	29
Supply Chain Management .....	30
<b>HUMAN RESOURCES</b> .....	31
Business Succession Planning.....	32
Contract Management.....	33
Crisis Management.....	34

Developing a Lunch & Learn .....	35
Health & Wellness at Work.....	36
Hiring Strategies.....	37
Human Resource Management.....	38
Measuring Results From Training.....	39
Millennial Onboarding.....	40
Talent Management.....	41
Train-The-Trainer .....	42
Universal Safety Practices .....	43
Workplace Diversity .....	44
Workplace Harassment .....	45
Workplace Violence.....	46
<b>WORKPLACE ESSENTIALS .....</b>	<b>47</b>
Appreciative Inquiry .....	48
Business Acumen.....	49
Business Ethics .....	50
Business Etiquette .....	51
Change Management .....	52
Civility In The Workplace.....	53
Conflict Resolution .....	54
Customer Service .....	55
Cyber Security .....	56
Delivering Constructive Criticism .....	57
Developing Corporate Behavior .....	58
Handling a Difficult Customer .....	59
Networking Outside the Company .....	60
Networking Within the Company.....	61
Risk Assessment & Management.....	62
Safety In The Workplace.....	63
Teamwork & Team Building .....	64

<b>SUPERVISORS &amp; MANAGERS</b> .....	65
Budgets & Financial Reports.....	66
Coaching & Mentoring.....	67
Conducting Annual Employee Reviews.....	68
Developing New Managers.....	69
Employee Motivation.....	70
Facilitation Skills.....	71
Knowledge Management.....	72
Leadership & Influence.....	73
Lean Process & Six Sigma.....	74
Manager Management.....	75
Middle Manager.....	76
Office Politics For Managers.....	77
Performance Management.....	78
Self-Leadership.....	79
Servant Leadership.....	80
Supervising Others.....	81
Team Building For Managers.....	82
Team Building Through Chemistry.....	83
Virtual Team Building & Management.....	84
<b>CAREER DEVELOPMENT</b> .....	85
10 Soft Skills You Need.....	86
Assertiveness & Self-Confidence.....	87
Communication Strategies.....	88
Creative Problem Solving.....	89
Developing Creativity.....	90
Digital Citizenship.....	91
Entrepreneurship.....	92
Interpersonal Skills.....	93
mLearning Essentials.....	94
Negotiation Skills.....	95
Personal Branding.....	96

Project Management .....	97
Telework & Telecommuting.....	98
The Cloud & Business.....	99
Time Management.....	100
Women in Leadership.....	101
<b>PERSONAL DEVELOPMENT .....</b>	<b>102</b>
Adult Learning - Mental Skills.....	103
Adult Learning - Physical Skills.....	104
Anger Management .....	105
Attention Management.....	106
Being A Likeable Boss .....	107
Critical Thinking.....	108
Emotional Intelligence .....	109
Goal Setting & Getting Things Done .....	110
Improving Mindfulness .....	111
Improving Self-Awareness .....	112
Increasing Your Happiness.....	113
Job Search Skills .....	114
Life Coaching Essentials.....	115
Managing Personal Finances .....	116
Managing Workplace Anxiety .....	117
Personal Productivity .....	118
Public Speaking.....	119
Social Intelligence.....	120
Social Learning.....	121
Stress Management.....	122
Taking Initiative .....	123
Work-Life Balance .....	124
Custom/On-demand training .....	125
<b>YOUR NEXT STEP .....</b>	<b>126</b>

YOU  
WILL  
LEARN

# SALES & MARKETING

**YOU  
WILL  
LEARN**

# CALL CENTER TRAINING

## MORE RESULTS AT LOWER COST

Phone skills are a highly valuable tool to have in an employee's skill-set, and Call Center Training will help provide those skills. This course will help you improve your phone skills which will make you more confident, improve sales, and help gain new customers while retaining your current clientele. A more confident employee is also one that is happier, and happier employees will produce happier customers.

Call Center Training will lower costs as it can reduce turnover. Participants will learn the skills to improve productivity and performance. This will produce a positive environment throughout your company and help influence the organization as a whole. Evaluating metrics and coaching are also used to make sure the participants are reaching their potential, and to keep their skill-set at a high level.

### Call Center Training - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Basics (I)

- Defining Buying Motives
- Establishing a Call Strategy
- Prospecting
- Qualifying
- Case Study

#### Module Three: The Basics (II)

- Getting Beyond The Gate Keeper
- Controlling The Call
- Difficult Customers
- Reporting
- Case Study

#### Module Four: Phone Etiquette

- Preparation
- Building Rapport
- Speaking Clearly - Tone of Voice
- Effective Listening
- Case Study

#### Module Five: Tools

- Self Assessments
- Utilizing Sales Scripts
- Making the Script Your Own
- The Sales Dashboard
- Case Study

#### Module Six: Speaking Like a Star

- S = Situation
- T= Task
- A= Action
- R = Result
- Case Study

#### Module Seven: Types of Questions

- Open Questions
- Closed Question
- Ignorant Redirection
- Positive Redirection
- Negative Redirection
- Multiple Choice Redirection
- Case Study

#### Module Eight: Benchmarking

- Benchmark Metrics
- Performance Breakdown
- Implementing Improvements
- Benefits
- Case Study

#### Module Nine: Goal Setting

- The Importance of Goals
- SMART Goals
- Staying Committed
- Motivation
- Overcoming Limitations
- Case Study

#### Module Ten: Key Steps

- Six Success Factors
- Staying Customer Focused
- The Art of Telephone Persuasion
- Telephone Selling Techniques
- Case Study

#### Module Eleven: Closing

- Knowing When it's Time to Close
- Closing Techniques
- Maintaining the Relationship
- After the Sale
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# COACHING SALES PEOPLE

## COACHING IS NOT JUST FOR ATHLETES

More and more organizations are choosing to include coaching as part of their instruction. Coaching salespeople, when done correctly, will not only increase sales, it will have a positive impact on the community and culture of a company. The benefits of coaching salespeople are numerous and worth exploring.

With our Coaching Salespeople workshop, you will discover the specifics of how to develop coaching skills. You will learn to understand the roles and responsibilities of coaching as well as the challenges that coaches face when it comes to working with salespeople.

### Coaching Sales People - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is a Coach?

- Be a Coach
- Roles
- Responsibilities
- Face Challenges
- Case Study

#### Module Three: Coaching

- Be Confident
- Build Connections
- Communicate
- Focus on the Process
- Case Study

#### Module Four: Process

- Define Effective Salespeople
- Coaching vs. Training
- How Coachable Is an Employee (A. G.R.O.W.T.H.)
- Avoid the Gap
- Case Study

#### Module Five: Inspiring

- Individualize
- Personalize Rewards
- Acknowledge Success
- Provide Opportunities Over Punishment
- Case Study

#### Module Six: Authentic Leadership

- Vulnerability
- Be Yourself and Encourage Individuality
- Listening
- Appreciate Effort
- Case Study

#### Module Seven: Best Practices

- SMART Goals
- Be Realistic
- Brainstorm Options
- Take Away
- Case Study

#### Module Eight: Competition

- Social Pressure
- Gamification
- Rewards
- Don't Go Overboard
- Case Study

#### Module Nine: Data

- Provide Clear Metrics
- Measurable Results
- Analyze Data
- Visualize Trends
- Case Study

#### Module Ten: Maintenance Strategies

- Benefits of Internal Program
- Choose a Method
- Create a Culture
- Train Coaches
- Case Study

#### Module Eleven: Avoid Common Mistakes

- Poor Leadership
- Ineffective Communication
- Incomplete Data
- Don't Be Afraid to Let Go
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



# CUSTOMER SERVICE TRAINING

## CUSTOMER SERVICE DEFINES YOUR BUSINESS

Customers want a well-educated agent when they contact a business. They want to know that the person answering their questions knows what they are talking about. Training your staff, and giving them the information that is needed to effectively assist your customer base is paramount.

With our Contact Center Training workshop you will gain the knowledge to provide a great customer experience, and teach it to others if needed. You will develop skills on how to deal with difficult costumers, build rapport, and great listening skills. All of these skills combined will provide an increase in overall customer satisfaction throughout your organization.

### Customer Service Training - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: It Starts at the Top**

- Create an Open Culture
- Understand Goals
- Understand Agents' Responsibilities
- Identify Education Opportunities
- Case Study

**Module Three: Peer Training**

- Top Performing Employees
- Discuss Role with Company
- Critique Previously Recorded Calls
- Cross Training
- Case Study

**Module Four: How to Build Rapport**

- Smile in Your Voice
- Engage in Small Talk
- Listen, Acknowledge, and Empathize
- Be Yourself
- Case Study

**Module Five: Learn to Listen**

- Allow Customer to Talk
- Avoid Judgment
- Take Notes
- Recap the Call
- Case Study

**Module Six: Manners Matter - Etiquette & Customer Service (I)**

- Scripting
- Dead Air
- Tone & Inflection
- Saying it the Right Way
- Case Study

**Module Seven: Manners Matter - Etiquette & Customer Service (II)**

- "Reading" Your Customers
- Properly Transferring Calls
- Going the Extra Mile
- Limit Information
- Case Study

**Module Eight: Handling Difficult Customers**

- Keep Calm
- Listen, Repeat, and
- Avoid Placing Blame
- Solve the Problem
- Case Study

**Module Nine: Getting the Necessary Information**

- Have a Checklist
- Linear Thinking
- Open-Ended Questions
- Close-Ended Questions
- Case Study

**Module Ten: Performance Evaluations**

- Consistent Service
- Abandoned Calls
- Speed of the Answer
- Length of Call
- Case Study

**Module Eleven: Training Doesn't Stop**

- Evaluate Progress
- Get Feedback on Training
- Kudos to Deserving Employees
- Have Monthly Meetings
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# CREATING A GREAT WEBINAR

## WEBINARS ARE GREAT TOOLS & ENVIRONMENT

Webinars are a great inexpensive way to reach a large number of people. Webinars are great tools if you want to market a new or improved product, train employees, demonstrate a new task, or have a meeting with employees located throughout the globe. Being an interactive form of media, Webinars provides a great environment for these activities and so much more.

Creating a Great Webinar is all about providing a great interaction between the presenter and the audience. You will develop the skills needed to promote, host, or facilitate a great Webinar for any specific goal in mind. Sharing your passion and knowledge with a Webinar is the best way to reach many with the power of one.

## Creating a Great Webinar - Course Outline

### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Action Plans and Evaluations

### Module Two: What Can a Webinar Do?

- Marketing to Prospective Customers
- Training or Teaching
- Demonstrations and Presentations
- Information Sharing
- Case Study

### Module Three: Successful Webinar Criteria

- Passion and Enthusiasm
- Value
- Knowing Your Target Audience
- Grab and Keep Attention
- Case Study

### Module Four: Find the Right Format

- Tailor It To Your Audience
- Pre-Recorded
- The Live Webinar
- Two Person Team
- Case Study

### Module Five: Marketing and Social Media

- Blog Posts and White Papers
- Email Marketing
- Offer an Exclusive Deal
- Hashtags
- Case Study

### Module Six: Drive Up Registration

- Avoiding SPAM Filter
- A Great Title
- Solicit Questions
- The Registration Page
- Case Study

### Module Seven: Leading up to Your Webinar

- Reminder Emails
- Practice and Rehearse
- Test Your Technology
- Insert Solicited Questions
- Case Study

### Module Eight: Presentation Tips

- Show, Don't Tell
- Sharing Your Desktop
- Strong Visuals
- Script It
- Case Study

### Module Nine: Interacting With Your Audience

- Polling and Surveys
- Answer Solicited Questions
- Activities
- Q&A Session
- Case Study

### Module Ten: Mistakes To Avoid

- Technical Issues
- Ignoring Your Audience
- Audience Not Participating?
- Timing
- Case Study

### Module Eleven: Post Event

- Contact No Shows
- Follow Up Email
- Call To Action
- Make it Easy to Share
- Case Study

### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# EVENT PLANNING

## PLANNING, CREATING AND RUNNING A SUCCESSFUL EVENT

Events do not just happen, they take time to plan, develop, and create. This workshop is designed to give participants the tools needed to host a great event. You will touch on planning and administrative techniques that will give you the confidence to run an engaging event that will leave a positive and lasting impression on each attendee.

With our Event Planning workshop you will explore ways to work with vendors, security, technicians, and wait staff. You will touch on different event types such as awards ceremonies, charity events, and business conferences. By utilizing the correct skill set you will be provided the details to pull off a successful event.

### Event Planning - Course Outline

**Module One: Getting Started**

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

**Module Two: Types of Events**

- Awards
- Charity
- Conferences and Seminar
- Holiday
- Case Study

**Module Three: Brainstorming**

- Determine the Event's Purpose
- Determine a Theme
- Write Down & Review Ideas
- Determine a Date
- Case Study

**Module Four: Types of Entertainment**

- Games
- Activities
- Speakers
- Performers
- Case Study

**Module Five: Support Staff**

- Security
- Valet
- Wait Staff
- Clean up Crew
- Case Study

**Module Six: Technical Staff**

- Visual Technician (lighting)
- Media Technician (website, Facebook, etc.)
- Audio Technician (Sound)
- Specialized Electrical Equipment Technician (for performers)
- Case Study

**Module Seven: Vendors**

- Food
- Equipment
- Decorations and Furnishing
- Photography/ Video
- Case Study

**Module Eight: Finalize the Plan**

- Venue
- Registration
- Entertainment
- Cuisine and Décor
- Case Study

**Module Nine: Administrative Tasks**

- Create a Budget
- Branding and Marketing
- Insurance and Permits
- Contracts (for event staff, entertainment, rentals, and vendors)
- Case Study

**Module Ten: Get Organized**

- Form a Team
- Timeline
- Checklists
- Backup Plans
- Case Study

**Module Eleven: Post Event Activities**

- Survey
- Share Media (photos and video)
- Send Thank you Notes
- Start planning the Next Event!
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations
- Recommended Reading

# HIGH PERFORMANCE TEAMS IN YOUR COMPANY

## UNCOVER & EMPOWER KEY PERSONNEL & PERFORMERS

High Performance Teams (Inside a Company) are organizations, teams or groups working inside an office environment that are focused on achieving the same goals. Bringing team members together can sometimes be a challenge task. This workshop identifies these challenges and helps you push through to success.

With this High-Performance Teams workshop, you will begin to see how important it is to develop a core set of high performance skills while working in an office locale. By knowing and managing the way people interact in an office setting, you will be positioning your high-performance teams to accomplish any task.

### High Performance Teams In Your Company -Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Benefits of High Performance Teams

- Creates Loyalty
- Optimum Productivity
- Collaboration
- Creates Visibility
- Case Study

#### Module Three: Challenges of High Performance Teams

- Can Create Competition
- High Turn-over Rate
- Negative Focus on Productivity
- Fear of Failure
- Case Study

#### Module Four: How to Build and Lead High Performance Teams

- Promote Understanding
- Provide Adequate Knowledge
- Facilitate Effective Interaction
- Conduct Effective Meetings
- Case Study

#### Module Five: Characteristics of High Performance Teams

- Understand the Big Picture
- Have Common Goals
- Work Collaboratively
- Produce Quality Results
- Case Study

#### Module Six: Roles of an Effective Team Leader

- Provides Adequate Training
- Timely, Constructive Feedback
- Views Mistakes as Opportunities
- Environment of Problem-solving
- Case Study

#### Module Seven: Traits of Great Leaders Leading High Performance Teams (I)

- Vision
- Patience
- Humility
- Humor
- Case Study

#### Module Eight: Traits of Great Leaders Leading High Performance Teams (II)

- Courage
- Compliance
- Tolerance
- Gratitude
- Case Study

#### Module Nine: Ideas for Motivating High Performance Teams

- Let Employees be Idealists
- No Negative Criticism
- Give Ample Praise
- Have Lunch with Each Employee
- Case Study

#### Module Ten: Steps to Retaining High Performers

- Give Them Visibility
- Keep Them Entertained
- Reward Them
- Provide Them with Mentors
- Case Study

#### Module Eleven: Augmenting Team Performance

- Authority
- Ask Questions
- Quickly Resolve Differences
- Practice Unanimity
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations
- Recommended Reading

# IN-PERSON SALES

## MOVING CUSTOMERS EASILY THROUGH THE SALES PROCESS

In the age of online shopping and technology, in-person sales can easily be ignored. Do not overlook the importance of personal contact. You never know when or where you will meet your next customer, and it is important to make a good impression. Everyone who is interested in sales must be confident in the art of in-person sales.

With our In-Person Sales workshop, you will discover the specifics of what it means to become an effective salesperson, and steps to success. You will learn how to connect with customers and move them through the sales process.

### IN-PERSON SALES - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: In-Person Sales

- Definition
- Benefits
- Cost
- Effectiveness
- Case Study

#### Module Three: Examples of In-Person Sales

- Sales Call
- Retail
- FaceTime
- Meetings
- Case Study

#### Module Four: Sales Funnel

- Generate Leads
- Nurture Leads
- Acquire Customer Base
- Expand Customer Base
- Case Study

#### Module Five: Prepare

- Effective Methods to Generate Leads
- Know Your Customer
- Practice Sales Conversation
- Set Goals
- Case Study

#### Module Six: Presentation

- Determine Venue
- Stay on Point
- Tie the Information to Customer Values
- Refer to Past Conversations
- Case Study

#### Module Seven: Engage

- Emotional Intelligence
- Allow Evaluation
- Overcome Objections
- Incentives
- Case Study

#### Module Eight: Commitment

- A Verbal "Yes"
- Maintain Connection
- Remind Customer of Value
- Call to Action
- Case Study

#### Module Nine: Sale

- It Isn't Over Till It's Over
- Make the Process Easy
- Close with Exceptional Service
- Thank and Reward
- Case Study

#### Module Ten: Loyalty

- Continuity Programs
- Special Rewards
- Handwritten Cards
- Case Study
- **Module Ten:** Review Questions
- **Module Eleven:** Expand
- Word of Mouth
- Networking
- Clubs
- Case Study

#### Module Eleven: Expand

- Word of Mouth
- Networking
- Clubs
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# MEDIA & PUBLIC RELATIONS

## EFFECTIVE EXPOSURE FOR ACCELERATED OPPORTUNITIES

In this workshop you, and your business, will get the knowledge you need to effectively manage your image and value by forming solid networks through strategic communication planning. Effective networking is essential for day-to-day business and for those times when you are actively pursuing work opportunities. This workshop is designed to provide practical and hands-on tools that will give you a skillset in dealing with the media and the public.

Media and Public Relations is the most successful method of communicating your value to those around you. Furthermore, good networking skills enable you to tap into those relationships you already have and increase the scope of your network. The larger the scope the more people knows you and offers you opportunities.

### Media & Public Relations - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Networking for Success (I)

- Creating an Effective Introduction
- Making a Great First Impression

#### Module Three: Networking For Success (II)

- Minimizing Nervousness
- Using Business Cards Effectively
- Remembering Names

#### Module Four: The Meet and Greet

- The Three-Step Process
- The Four Levels of Conversation
- Case Study (I)
- Case Study (II)

#### Module Five: Dressing for Success

- The Meaning of Colors
- Interpreting Common Dress Codes
- Deciding What to Wear

#### Module Six: Writing

- Business Letters
- Writing Proposals
- Reports
- Executive Summaries

#### Module Seven: Setting Goals

- Understanding Goals
- SMART Goals
- Helping Others with Goal Setting

#### Module Eight: Media Relations

- Television
- Print
- Web Presence, Blogs & the Internet

#### Module Nine: Issues and Crisis Communication Planning

- Gauging the Impending Crisis Level
- Providing Feedback and Insights
- How Information Will be Distributed
- Tracking the Overall Effect

#### Module Ten: Social Media (The PR Toolkit)

- Blogs
- Wikis
- Podcasts
- Social Bookmarks
- RSS Feeds

#### Module Eleven: Employee Communications

- Verbal Communication
- Non-Verbal Communication Skills
- Email Etiquette
- Negotiation Skills
- Making an Impact

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# MOTIVATING YOUR SALES TEAM

## THE RIGHT INCENTIVES FOR EXPANDING RESULTS

Everyone can always use some inspiration and motivation. This workshop will help you target the unique ways each of your team member is motivated. Finding the right incentive for each member of your sales team is important as motivation works best when it is developed internally. Harness this through better communication, mentoring, and developing the right incentives.

Motivating Your Sales Team will help you create the right motivating environment that will shape and develop your sales team with right attitude and healthy competition. Instilling that unique seed which grows the motivation in your team will ensure an increase in performance and productivity. Have the best sales team you can have through better motivation.

### Motivating Your Sales Team - Outline

**Module One: Getting Started**

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

**Module Two: Creating a Motivational Environment**

- Frequent Team Check-Ins
- Train Your Team
- Emulate Best Practices
- One Size Does Not Fit All!
- Case Study

**Module Three: Communicate to Motivate**

- Regular Group Meetings
- Regular One on One Meetings
- Focus on Strengths and Development Areas
- Ask for Feedback
- Case Study

**Module Four: Train Your Team**

- Focus on Training and Development
- Peer Training
- Mentoring
- Keep the Focus Positive!
- Case Study

**Module Five: Emulate Best Practices**

- Look to Industry Leaders
- Solicit Team Member Suggestions
- Take a Field Trip!
- Leverage Outside Expertise
- Case Study

**Module Six: Provide Tools**

- The Right Tools
- Ask Team Members What Tools They Need
- Provide High Quality Tools
- Allow for Training
- Case Study

**Module Seven: Find Out What Motivates Employees**

- One Size Does Not Fit All
- Find What Motivates Individuals
- Find What Motivates the Team
- Tailor Rewards to Employees
- Case Study

**Module Eight: Tailor Rewards to the Employee**

- Motivation is Personal!
- Choose 1-3 Motivators
- Employee's Personal Goals
- Reward Achievements
- Case Study

**Module Nine: Create Team Incentives**

- Incentives Foster Teamwork
- Team Goals
- Choose 1-3 Motivators
- Reward Achievements
- Case Study

**Module Ten: Implement Incentives**

- Regular Incentives
- Mark Milestones
- Encourage Friendly Competition
- Keep Value Reasonable
- Case Study

**Module Eleven: Recognize Achievements**

- Recognition Motivates!
- Recognize Achievements Regularly & Publicly
- Document Achievements
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# MULTI LEVEL MARKETING

## BETTER UNDERSTANDING OF THE MLM WORLD

Multi-level marketing, also known as MLM, is a business marketing strategy that many companies use in order to encourage current agents to perform while at the same time growing the team by recruiting and training new agents. This tactic of marketing helps boost the company's sales force not only from the sales of the primary agent, but also from the sales and profits of the agents they have recruited.

With our Multi-Level Marketing workshop, you will discover the specifics of how multi-level marketing works and how to effectively source agents. For many companies, it can prove to be a valuable tool for not only building revenue, but also for building their marketing and networking circles.

### Multi-Level Marketing - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: How Does Multi-Level Marketing Work**

- Networking Marketing
- Independent Agents
- Commission-Based
- Agents Recruit New Agents
- Case Study

**Module Three: Building a Contact List**

- Leverage Personal Networks
- Warm Lists
- Internet Lead Generation
- Purchasing Lead Lists
- Case Study

**Module Four: Recruiting New Agents (I)**

- Draw on Personal and Professional Network
- Recruit Satisfied Customers
- Recruit Those Who Seek Work Flexibility
- Stress Benefits of Being Agent
- Case Study

**Module Five: Recruiting New Agents (II)**

- Invitation to Marketing Presentation
- Focus Presentation on Benefits
- Showcase Success Stories
- Provide Several Presentation Media
- Case Study

**Module Six: Training MLM Agents**

- Sponsorship/Mentorship
- Provide Training in Marketing
- Provide Training in Recruitment
- Provide Ethics Training
- Case Study

**Module Seven:**
**Sponsorship/Mentorship**

- Pair New Agents with Mentors
- Benefits of Sponsorship & Mentorship to Mentee
- Benefits of Sponsorship & Mentorship to Mentor
- Best Mentorship Practices
- Case Study

**Module Eight: Provide Marketing Presentation Training**

- Provide Training in Presentations
- Provide Copies of Marketing Presentation
- New Recruits Practice Presentation
- Offer Marketing Resources
- Case Study

**Module Nine: Provide Social Media Training**

- Social Media is Key to Networking!
- Websites and Blogs
- Facebook and Twitter
- LinkedIn
- Case Study

**Module Ten: Provide Training in Recruitment**

- Building a Contact List
- Leveraging Personal and Professional Networks
- Provide Presentation/ 'Elevator speech' Training
- Discuss Follow-up
- Case Study

**Module Eleven: Provide Ethics Training**

- MLM and Bad Rap for Ethics
- Only Follow-up if Opted In
- Keeping the Sales Pitch Honest
- Keep Expectations Realistic
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations
- Recommended Reading



# OVERCOMING SALES OBJECTIONS

## TURNING A “NO” INTO MANY “YES”

Experiencing a sales objection can be a disheartening event. Through this course you will learn how to eliminate the objection and push through to get that sale. Even the best quality services or items can be turned down, and learning how to overcome these denials will be of great benefit.

Overcoming Sales Objections is an essential part of the sales process, as it will open up a whole new set of opportunities. It will produce new sales and provide an ongoing relationship with new clients. Objections will always occur no matter the item being sold or presented.

### Overcoming Sales Objections - Outline

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Action Plans and Evaluation Forms

**Module Two: Three Main Factors**

- Skepticism
- Misunderstanding
- Stalling

**Module Three: Seeing Objections as Opportunities**

- Translating the Objection to a Question
- Translating the Objection to a Reason to Buy
- Case Study

**Module Four: Getting to the Bottom**

- Asking Appropriate Questions
- Common Objections
- Basic Strategies
- Case Study

**Module Five: Finding a Point of Agreement**

- Outlining Features and Benefits
- Identifying Your Unique Selling Position
- Agreeing with the Objection to Make the Sale
- Case Study

**Module Six: Have the Client Answer Their Own Objection**

- Understand the Problem
- Render It Unobjectionable
- Case Study

**Module Seven: Deflating Objections**

- Bring up Common Objections First
- The Inner Workings of Objections
- Case Study

**Module Unvoiced Objections**

- How to Dig up the "Real Reason"
- Bringing Their Objections to Light
- Case Study

**Module Nine: The Five Steps**

- Expect Them
- Welcome Them
- Affirm Them
- Complete Answers
- Compensating Benefits

**Module Ten: Dos and Don'ts**

- Dos
- Don'ts

**Module Eleven: Sealing the Deal**

- Understanding When It's Time to Close
- Powerful Closing Techniques
- The Power of Reassurance
- Things to Remember

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
WILL  
LEARN

# PRESENTATION SKILLS

## PREPARE & EASILY DELIVER POWERFUL PRESENTATIONS

Many studies have found that public speaking is the number one fear amongst most people, outranking flying, snakes, insects, and even death. Ironically, it is also one of the skills that can make or break a person's career. You will be provided a strong set of skills that will complement your current presentation level and skill set.

This Presentation Skills workshop will give you some presentation skills that will make speaking in public less terrifying and more enjoyable. The workshop includes topics that you can look forward to including: creating a compelling program, using various types of visual aids, and engaging the audience. The workshop is adapted to the skill level of the participants when it comes to speaking in public.

### Presentation Skills - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: Creating the Program**

- Performing a Needs Analysis
- Writing the Basic Outline
- Researching, Writing, and Editing

**Module Three: Choosing Your Delivery Methods**

- Basic Methods
- Advanced Methods
- Basic Criteria to Consider

**Module Four: Verbal Communication Skills**

- Listening and Hearing: They Aren't the Same Thing
- Asking Questions
- Communicating with Power

**Module Five: Non-Verbal Communication Skills**

- Body Language
- It's Not What You Say, It's How You Say It

**Module Six: Overcoming Nervousness**

- Preparing Mentally
- Physical Relaxation Techniques

**Module Seven: Creating Fantastic Flip Charts**

- Required Tools
- The Advantages of Pre-Writing
- Using Colors Appropriately
- Creating a Plan B

**Module Eight: Creating Compelling PowerPoint Presentations**

- Required Tools
- Tips and Tricks
- Creating a Plan B

**Module Nine: Wow them with the Whiteboard**

- Traditional and Electronic Whiteboards
- Required Tools
- Using Colors Appropriately
- Creating a Plan B

**Module Ten: Vibrant Videos and Amazing Audio**

- Required Tools
- Tips and Tricks
- Creating a Plan B

**Module Eleven: Pumping it Up a Notch**

- Make Them Laugh a Little
- Encouraging Discussion
- Dealing with Questions

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# PROPOSAL WRITING

## MAKING YOUR PROPOSAL THE ONLY LOGICAL CHOICE

A good proposal doesn't just outline what product or service you would like to create or deliver. It does so in such a way that the reader feels it is the only logical choice. Here you will explore the proposal writing process including the most common types of proposals.

The Proposal Writing workshop will take you through each step of the proposal writing process, from understanding why you are writing a proposal, to gathering information, to writing and proofreading, through to creating the final, professional product.

### Proposal Writing - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Proposals

- What is a Proposal?
- The Proposal Writing Process
- Types of Proposals
- About Requests for Proposals

#### Module Three: Beginning the Proposal Writing Process

- Identifying Your Purpose and Your Audience
- Performing a Needs Analysis
- Writing the Goal Statement

#### Module Four: Preparing an Outline

- A General Format
- Special Sections
- Creating a Framework
- Getting Down to Details

#### Module Five: Finding Facts

- Identifying Resources
- Using the Internet as a Resource
- Organizing Your Information

#### Module Six: Writing Skills (I)

- Spelling and Grammar
- Working with Words
- Constructing Sentences
- Persuasive Writing
- Mastering Voice

#### Module Seven: Writing Skills (II)

- Creating Paragraphs
- Creating Strong Transitions
- Building to Conclusions

#### Module Eight: Writing the Proposal

- Educating the Evaluator
- Ghosting the Competition
- Using Illustrations

#### Module Nine: Readability

- Checking for Clarity
- Reading for Your Audience
- Using the Readability Index

#### Module Ten: Proofreading and Editing

- Proofreading Like a Pro
- Editing Techniques
- Checking the Facts
- The Power of Peer Review

#### Module Eleven: Adding the Final Touches

- Our Top Typesetting Tips
- Achieving a Professional Look and Feel
- Creating the Final Package

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# TELEPHONE & CELL ETIQUETTE

## A KEY CONNECTION WITH YOUR CLIENTELE

Phone etiquette is a highly valuable tool to have in an employee's skill-set, and this Telephone Etiquette workshop will help provide those skills. This course will help you improve your phone skills which will make you more confident, improve sales, and help gain new customers while retaining your current clientele. A more confident employee is also one that is happier, and happier employees will produce happier customers.

Through our Telephone Etiquette workshop you will learn the skills to increase productivity and improve performance. This will produce a positive environment throughout your business and influence the organization as a whole. Recognizing the different skills used between inbound and outbound calls along with knowledge on how to deal with rude or angry callers makes this workshop a great investment.

## Telephone & Cell Etiquette - Course Outline

### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

### Module Two: Aspects of Phone Etiquette

- Phrasing
- Tone of Voice
- Speaking Clearly
- Listen to the Caller
- Case Study

### Module Three: Using Proper Phone Language

- Please and Thank You
- Do Not Use Slang
- Avoid Using the Term "You"
- Emphasize What You Can Do, Not What You Can't
- Case Study

### Module Four: Eliminate Phone Distractions

- Avoid Eating or Drinking
- Minimize Multi-Tasking
- Remove Office Distractions
- Do Not Let Others Interrupt
- Case Study

### Module Five: Inbound Calls

- Avoid Long Greeting Messages
- Introduce Yourself
- Focus on Their Needs
- Be Patient
- Case Study

### Module Six: Outbound Calls

- Be Prepared
- Identify Yourself and Your Company
- Give Them the Reason for the Call
- Keep Caller Information Private
- Case Study

### Module Seven: Handling Rude or Angry Callers

- Stay Calm
- Listen to the Needs
- Never Interrupt
- Identify What You Can Do For Them
- Case Study

### Module Eight: Handling Interoffice Calls

- Transferring Calls
- Placing Callers on Hold
- Taking Messages
- End the Conversation
- Case Study

### Module Nine: Handling Voicemail Messages

- Ensure the Voice Mail Has a Proper Greeting
- Answer Important Messages Right Away
- Ensure Messages are Delivered to the Right Person
- When Leaving A Message for Others...
- Case Study

### Module Ten: Methods of Training Employees

- Group Training
- One-on-One Training
- Peer Training
- Job Shadowing
- Case Study

### Module Eleven: Correcting Poor Telephone Etiquette

- Screening Calls
- Employee Evaluations
- Peer Monitoring
- Customer Surveys
- Case Study

### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# TOP 10 SALES SECRETS

## OBSERVING RESULTS TO MULTIPLY SUCCESS

No one is born a sales person. No one has a special gift that makes customers buy products/services. Everyone can however, learn how to sell successfully. By learning to communicate with customers, build lead lists, and sell the company's services with authority, anyone can be a successful sales person.

With our Top 10 Sales Secrets workshop, you will discover the specifics of how to develop the traits that will make you successful sales people and how to build positive, long lasting relationships with your customers.

### Top 10 Sales Secrets - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Effective Traits

- Assertiveness
- Emotional Intelligence
- Solve Problems
- Close
- Case Study

#### Module Three: Know Clients

- Research
- Customer Values
- Customer Needs
- Anticipate Needs
- Case Study

#### Module Four: Product

- Know Your Product
- Believe in the Company/Product
- Be Enthusiastic
- Link Product to Customer's Values
- Case Study

#### Module Five: Leads

- Sift Leads
- Time vs. Cost of Pursuing Leads
- Let Go of Leads Going Nowhere
- Focus on Positive Leads
- Case Study

#### Module Six: Authority

- Develop Expertise
- Know Your Competition
- Continue Education
- Solve Customer Problems Using Authority
- Case Study

#### Module Seven: Build Trust

- Testimonials
- Be Transparent
- Be Genuine
- Take on Customers' Point of View
- Case Study

#### Module Eight: Relationships

- Listen Actively
- Communicate Often
- Rewards
- Build New Relationships
- Case Study

#### Module Nine: Communication

- Be Prepared, Not Scripted
- Use Humor
- Be Yourself
- Thank and Reward
- Case Study

#### Module Ten: Self-Motivation

- Value Your Work
- Reward Achievements
- Focus on Success
- Do Not Procrastinate
- Case Study

#### Module Eleven: Goals

- SMART Goals
- Long-Term Goals
- Short-Term Goals
- Track and Modify
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

Note: This class is normally more effective when bundled with our Tradeshow Success workshop

# ADMINISTRATIVE SKILLS

**YOU  
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# ADMINISTRATIVE OFFICE PROCEDURES

## NOT GLAMOROUS, BUT ESSENTIAL!

Administrative office procedures may not be glamorous, but they are essential to the success of any enterprise. A well-run office reduces miscommunications and helps to eliminate common errors. By making the administrative office a priority, you will establish clear policies and procedures with employee understanding and buy-in, which ensures that your work environment runs smoothly.

With our Administrative Office Procedures workshop, your participants will understand how an Administrative Office Procedure binder demonstrates professionalism and efficiency in an organization or office setting. It is also a marvelous instrument for quick reference and utilization. Strategies and procedures are a vital connection between the company's vision and its everyday operations.

### Administrative Office Procedures - Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Why Your Office

- Needs Administrative Procedures
- Business Continuity
- Succession Planning
- Internal and External Audit Requirements
- Recovery Planning
- Case Study

#### Module Three: Gathering the Right

- Tools
- Binder
- Section Divider
- Sheet Protectors
- Cover to Cover Binders
- Case Study

#### Module Four: Identifying Procedures to Include

- Tracking Tasks for Some Days
- Reach Out to Other Employees for Feedback/Ideas
- Write Down Daily Tasks
- Keep Track Using a Spreadsheet
- Case Study

#### Module Five: Top Five Procedures to Record

- Use a Template to Stay Consistent from Track to Track
- Be as Detailed as Possible
- Use Bullet Points Instead of Paragraphs
- Ask Someone to Execute the Procedure
- Case Study

#### Module Six: What to Include in Your Binder #1

- Phone Etiquette
- Business Writing
- Effective Time Management
- Creating Meeting Arrangements
- Case Study

#### Module Seven: What to Include in Your Binder #2

- Policy on Absences
- Breaks
- Salaries
- Benefits
- Case Study

#### Module Eight: Organizing Your Binder

- Create a Table of Contents
- List Each Section (e.g. Accounting)
- List Procedures in that Section
- Keep Binder Updated with any New Changes
- Case Study

#### Module Nine: What Not to Include in the Procedure Guide

- Passwords
- Identify Other Confidential Information Via Your Employer
- Store Information in a Separate Folder Outside of the Guide
- Find a Secure Location to Store
- Case Study

#### Module Ten: Share Office Procedure Guide

- Give Guide to Boss/Executive to Review
- Inform Office Personnel of Procedure Guide
- Place Guide in a Visible Area
- Allow Office Personnel to Express Improvements/Updates if Needed
- Case Study

#### Module Eleven: Successfully Executing the Guide

- Create a One Hour Meeting/Seminar for Employees
- Stay Consistent with Procedures
- Make Employees Aware of any Updated Changes
- Keep Open to Improvements
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

**YOU  
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# ADMIN SUPPORT

## SPECIAL TRAINING FOR ADMIN ASSISTANTS

Administrative assistants are a key part of most office environments. They work quietly in the background, ensuring that the business runs smoothly and efficiently. This workshop will give new administrative assistants tools that will make them that person that the office can't live without. Experienced administrative assistants will learn new tools that will make them more efficient and valuable than ever.

In the Administrative Support course, participants will learn the core skills that will help them use their resources efficiently, manage their time wisely, communicate effectively, and collaborate with others skillfully. The practices presented in this course may take time to be a part of their daily work routine. However, making the commitment to consistently apply the concepts every day is the key to changing and adopting new behaviors in a short amount of time.

### Administrative Support - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Getting Organized, Part One

- Dealing with E-Mail
- Managing Electronic Files
- Keeping Track of the Paper Trail
- Making the Most of Voice Mail

#### Module Three: Getting Organized, Part Two

- Keeping Your Workspace Organized
- Using a To-Do Book
- The Extra Mile: Adding Project Management Techniques to Your Toolbox

#### Module Four: Managing Time

- Managing Your Time
- Keeping Others on Track
- Maintaining Schedules

#### Module Five: Getting It All Done On Time

- Prioritizing
- The Secret to Staying on Track
- Goal Setting

#### Module Six: Special Tasks

- Planning Small Meetings
- Planning Large Meetings
- Organizing Travel

#### Module Seven: Verbal Communication Skills

- Listening and Hearing: They Aren't the Same Thing
- Asking Questions
- Communicating with Power

#### Module Eight: Non-Verbal Communication Skills

- Body Language
- The Signals You Send to Others
- It's Not What You Say, It's How You Say It

#### Module Nine: Empowering Yourself

- Being Assertive
- Resolving Conflict
- Building Consensus
- Making Decisions

#### Module Ten: The Team of Two

- Working with Your Manager
- Influencing Skills
- What to Do in Sticky Situations

#### Module Eleven: Taking Care of Yourself

- Ergonomics
- Stress Management
- Dealing with a Heavy Workload

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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# BASIC ACCOUNTING

## GOOD UNDERSTANDING LEADS TO PROPER BOOKKEEPING

Numbers! Numbers! Numbers! Wherever you go, you are bound to see them. On addresses, license plates, phones, prices, and of course, spreadsheets & financial statements. Numbers connect us all to each other in many more ways than we might imagine. Essentially, our world revolves around numbers.

Some of us enjoy dealing with numbers while others may have a fear of them, or even a phobia. This workshop will help you understand what business accounting is all about, while reviewing the key financial statements necessary to the survival as well as to the growth of a business.

### Basic Accounting - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Basic Terminology (I)

- Balance Sheet
- Assets
- Liabilities
- Equity
- Income Statement
- Revenue
- Cost of Goods Sold
- Expenses
- Accounting Period

#### Module Three: Basic Terminology (II)

- Accounts Receivable
- Accounts Payable
- Depreciation
- General Ledger
- Interest
- Inventory
- Journals
- Payroll
- Trial Balance

#### Module Four: Accounting Methods

- Cash Method
- Accrual Method
- Differences between Cash and Accrual

#### Module Five: Keeping Track of Your Business

- Accounts Payable
- Accounts Receivable
- The Journal
- The General Ledger
- Cash Management

#### Module Six: Understanding the Balance Sheet

- The Accounting Equation
- Double-Entry Accounting
- Types of Assets
- Types of Liabilities
- Equity

#### Module Seven: Other Financial Statements

- Income Statement
- Cash Flow Statement
- Capital Statement
- Budget vs. Actual

#### Module Eight: Payroll Accounting / Terminology

- Gross Wages
- Net Wages
- Employee Tax Withholdings
- Employer Tax Expenses
- Salary Deferrals
- Employee Payroll
- Employee Benefits
- Tracking Accrued Leave
- Government Payroll Returns/Reports

#### Module Nine: End of Period Procedures

- Depreciating Your Assets
- Reconciling Cash
- Reconciling Investments
- Working with the Trial Balance
- Bad Debt
- Posting Adjustments and Corrections

#### Module Ten: Financial Planning, Budgeting and Control

- Reasons for Budgeting
- Creating a Budget
- Comparing Budget to Actual Expenses

#### Module Eleven: Auditing

- What is an Audit?
- When and Why Would You Audit?
- Internal
- External

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# BUSINESS WRITING

## EVERY WRITTEN WORD IS A REFLECTION OF YOUR BUSINESS

Writing is a key method of communication for most people, and it's one that many people struggle with. Writing and communication skills have degraded with more and more people communicating through email and text messaging. Developing writing skills is still important in the business world as creating proper documents (such as proposals, reports, and agendas), giving you that extra edge in the workplace.

The Business Writing workshop will give you a refresher on basic writing concepts (such as spelling, grammar, and punctuation), and an overview of the most common business documents. These basic skills will provide you with that extra benefit in the business world that a lot of people are losing.

### Business Writing - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Working with Words

- Spelling
- Grammar
- Creating a Cheat Sheet

#### Module Three: Constructing Sentences

- Parts of a Sentence
- Punctuation
- Types of Sentences

#### Module Four: Creating Paragraphs

- The Basic Parts
- Organization Methods

#### Module Five: Writing Meeting Agendas

- The Basic Structure
- Choosing a Format
- Writing the Agenda

#### Module Six: Writing E-mails

- Addressing Your Message
- Grammar and Acronyms

#### Module Seven: Writing Business Letters

- The Basic Structure
- Choosing a Format
- Writing the Letter

#### Module Eight: Writing Proposals

- The Basic Structure
- Choosing a Format
- Writing the Proposal

#### Module Nine: Writing Reports

- The Basic Structure
- Choosing a Format
- Writing the Report

#### Module Ten: Other Types of Documents

- Requests for Proposals
- Projections
- Executive Summaries
- Business Cases

#### Module Eleven: Proofreading and Finishing

- A Proofreading Primer
- How Peer Review Can Help
- Printing and Publishing

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# EXECUTIVE & PERSONAL ASSISTANTS

## FROM SCHEDULER TO GATEKEEPER & BEYOND

Being an Executive or Personal Assistant is a unique position that requires a variety of skills. Whether you are updating schedules, making travel arrangements, minute taking, or creating important documents all must be done with a high degree of confidentiality. Confidentiality is one of the most important characteristics for every assistant.

Our Executive and Personal Assistants workshop will show participants what it takes to be a successful assistant. Participants will learn what it takes to effectively manage a schedule, organize a meeting, and even how to be a successful gatekeeper. Being an Executive or Personal Assistant takes a special skill set and this workshop will provide participants with the necessary tools.

### Executive & Personal Assistants - Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Working with Your Manager

- Adapting to Their Style
- Anticipate Their Needs
- Getting Your Responsibilities Defined
- When to Take the Initiative
- Case Study

#### Module Three: Administrative Soft Skills

- Social Intelligence
- Basic Business Acumen
- Office Management
- Active Listening
- Case Study

#### Module Four: Effective Time Management

- Calendar Management
- Prepare for Changes and Surprises
- Keeping Others On Track
- Urgent/Important Matrix
- Case Study

#### Module Five: Meeting Management

- Creating An Agenda
- Keeping Minutes
- Keeping the Meeting On Time
- Variations for Large and Small Meetings
- Case Study

#### Module Six: Tools of the Trade (I)

- Email Protocol
- Office Machinery
- Computer and Software Skills
- Communication Skills
- Case Study

#### Module Seven: Tools of the Trade (II)

- Phone and Voicemail Etiquette
- Word Processing
- Business Writing
- Internet Research
- Case Study

#### Module Eight: Being an Effective Gatekeeper

- Filtering Data and Information
- Learn to Say No
- Dealing With Difficult People
- Recognize the Tricks
- Case Study

#### Module Nine: Organizational Skills

- Prioritizing Your Workload
- Goal Setting
- Plan for Tomorrow, Today
- Staying on Track
- Case Study

#### Module Ten: Confidentiality Guidelines

- Your Confidentiality Duty
- Be Diplomatic and Discreet
- Keeping Data Secure
- What To Do in Sticky Situations
- Case Study

#### Module Eleven: Special Tasks

- Project Management
- Trade Shows
- Interacting with Clients
- Social Media Management
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# ORGANIZATIONAL SKILLS

## BETTER MANAGEMENT LEADS TO IMPROVED PRODUCTIVITY

Developing good Organizational Skill is an investment that will provide benefits for years. To be successful means to be organized in some ways. These skills will filter through all aspects of your professional and personal life. Throughout this workshop you will be given the tools necessary in developing better Organizational Skills.

Through this Organizational Skills workshop you will encounter improved productivity, better management, and an overall increase in professional growth. Every day people waste large amounts of time looking for things. So stop looking for those important items, and start knowing where they are by getting organized.

### Organizational Skills - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Remove the Clutter

- Just Do It
- You Don't Have to Keep Everything
- Three Boxes: Keep, Donate, and Trash
- A Place For Everything And Everything In Its Place
- Case Study

#### Module Three: Prioritize

- Write It Down
- Urgent/Important Matrix
- Divide Tasks
- 80/20 Rule
- Case Study

#### Module Four: Scheduling Your Time

- Have a Master Calendar
- Setting Deadlines
- Remove or Limit the Time Wasters
- Coping With Things Outside of Our Control
- Case Study

#### Module Five: To Do Lists

- Use a Day Planner
- Finish What You Start
- Focus on the Important
- Do Quick Tasks Immediately
- Case Study

#### Module Six: Paper and Paperless Storage

- Find a System that Works for You
- Make it Consistent
- Make it Time Sensitive
- Setting up Archives
- Case Study

#### Module Seven: Organization Your Work Area

- Keeping Items Within Arm's Reach
- Only Have Current Projects on Your Desk
- Arranging Your Drawers
- Organize to Match Your Workflow
- Case Study

#### Module Eight: Tools to Fight Procrastination

- Eat That Frog!
- Remove Distractions
- Give Yourself a Reward
- Break Up Large Tasks
- Case Study

#### Module Nine: Organizing your Inbox

- Setting up Delivery Rules
- Folder and Message Hierarchy
- Deal with Email Right Away
- Flag and Highlight Important Items
- Case Study

#### Module Ten: Avoid the Causes of Disorganization

- Keeping Everything
- Not Being Consistent
- Not Following a Schedule
- Bad Habits
- Case Study

#### Module Eleven: Discipline is the Key to Stay Organized

- Stay Within Your Systems
- Learn to Say No
- Have Organization Be Part of Your Life
- Plan for Tomorrow, Today
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
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# SOCIAL MEDIA IN THE WORKPLACE

## LEARN HOW TO GET SOCIAL MEDIA & YOUR WORKPLACE WORK TOGETHER

We are being flooded with Social Media invitations and updates. Web-based communication icons like Twitter, Facebook, YouTube, and LinkedIn are dominating the way we interact with each other. People are feeling the need to be updated at all times. It has become a time eater, and businesses are quickly becoming aware of the drain it can have on productivity. People love to share, but they need to know what is alright to share and what should not be sent out.

The Understanding Social Media workshop is about communicating the right way. We are beginning to communicate more through electronic means than face to face. Talking on a phone has been replaced more and more with SMS (texting.) Social media channels are becoming the main form of communication and you will realize how Social media and the Workplace can work together.

### Social Media in the Workplace - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is Social Media?

- Online Communities
- User Created Content
- Information Sharing
- Communication Tools
- Case Study

#### Module Three: Defining Your Social Media Policy (I)

- It Should be a Living Document
- Choosing an Information Officer
- What Can and Cannot Be Shared
- Legal and Ethic Specifications
- Case Study

#### Module Four: Defining Your Social Media Policy (II)

- New Hire Orientation
- Let Common Sense Guide You
- Nothing Offensive
- Rules on Soliciting and Personal Posts
- Case Study

#### Module Five: Creating a Living Document

- What is a Living Document?
- How Often is it Revised?
- Who Will be in Charge
- Change Management
- Case Study

#### Module Six: Keeping an Eye on Security

- Password Rules
- Needs Constant Monitoring
- Keeping Information Confidential
- Protecting Intellectual Property
- Case Study

#### Module Seven: Rules to Follow When Posting (I)

- Always Show Respect
- Stop and Think Before You Post
- Always be Honest
- Never Discredit or Talk Ill of Competitors
- Case Study

#### Module Eight: Rules to Follow When Posting (II)

- Eat That Frog!
- Remove Distractions
- Give Yourself a Reward
- Break Up Large Tasks
- Case Study

#### Module Nine: Benefits of Social media

- From Audience to Author
- Builds Customer Loyalty
- Speed and Flexibility in Communication
- Two Way Communications
- Case Study

#### Module Ten: The Pitfalls of Social Media

- Bullying
- Group Think
- Trolling
- Remember, It Is Out There Forever
- Case Study

#### Module Eleven: Listen to Your Customers

- They Provide Great Feedback
- It Makes Them Happy
- Improves Your Brand
- Improves Product Development
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
WILL  
LEARN

# SUPPLY CHAIN MANAGEMENT

## GOOD UNDERSTANDING LEADS TO PROPER BOOKKEEPING

The Supply Chain Management workshop improves the coordination and relationship between Suppliers, Producers, and Customers. It must be kept at a high level of organization to be successful in today's global economy. Goods and services are now pieced together from all over the world, and this process can be hectic and complicated if not managed correctly.

With this Supply Chain Management workshop you, your company and employees will be on target to lower costs, improving efficiency, and increase customer satisfaction. This course will provide you with the understanding of how Supply Chain Management can improve and help almost any type of business.

### Supply Chain Management - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Why Supply Chain Management?

- Customer Satisfaction
- Improving Performance
- Lowering Costs
- Product Development
- Case Study

#### Module Three: Key Terms (I)

- Procurement
- Upstream and Downstream
- Raw Material
- Forecasting
- Carrying Cost
- Case Study

#### Module Four: Key Terms (II)

- Inventory
- Order Generation
- Order Taking
- Order Fulfillment
- Returns Management
- Case Study

#### Module Five: Three Levels of Supply Chain Management

- Strategic level
- Tactical level
- Operational Level
- Bullwhip Effect
- Case Study

#### Module Six: Five Stages of Supply Chain Management

- Plan
- Source
- Make
- Deliver
- Return
- Case Study

#### Module Seven: The Flows of Supply Chain Management

- The Product Flow
- The Information Flow
- The Finances Flow
- Data Warehouses
- Case Study

#### Module Eight: Inventory Management

- Levels of Inventory
- Just-In-Time Inventory
- Keeping Accurate Records
- Inventory Calculator
- Case Study

#### Module Nine: Supply Chain Groups

- The Suppliers
- The Producers
- The Customers
- The Customer's Customers
- Case Study

#### Module Ten: Tracking and Monitoring

- Dashboard
- RFID's
- Alert Generation
- Stock Keeping Unit (SKU)
- Case Study

#### Module Eleven: Supply Chain Event Management

- Inventory Alerts
- Supplier Alerts
- Bottlenecking
- Being Proactive
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# HUMAN RESOURCES

# BUSINESS SUCCESSION PLANNING

## ESSENTIAL FOR THE SURVIVAL & LEGACY OF A BUSINESS

Business succession planning is all about being prepared. The loss of valuable leadership can cripple even the strongest of companies. Succession planning is an essential component to the survival and growth of any business. Whether it is grooming employees to become leaders, or preparing for an employee's retirement, you will identify common obstacles and how to overcome them.

Our Business Succession Planning workshop will show you the differences between succession planning and mere replacement planning. How you prepare people to take on leadership responsibilities is just as important as hiring the right person for the job. Every company, of any size, should have a form of succession planning in its portfolio.

### Business Succession Planning - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Succession Planning Vs. Replacement Planning

- What is Business Succession Planning?
- What Is Replacement Planning?
- Differences Between
- Deciding What You Need

#### Module Three: Preparing for the Planning Process

- How to Set Parameters for the Planning Process
- Should You Establish a Committee?
- How to Gather Operational Data

#### Module Four: Initiating Process

- Develop a Mission Statement
- Develop a Vision Statement
- Choosing to Be a Mentor

#### Module Five: The SWOT Analysis

- Identifying Strengths
- Identifying Weaknesses
- Identifying Opportunities
- Identifying Threats

#### Module Six: Developing the Succession Plan

- Prioritize What the Succession Plan Will Address
- Set Goals and Objectives
- Develop a Strategy for Achieving Goals
- Draft the Plan

#### Module Seven: Executing the Plan

- Assign Responsibility and Authority
- Establish a Monitoring System
- Identifying Paths
- Choosing Your Final Approach

#### Module Eight: Gaining Support

- Gathering Data
- Addressing Concerns and Issues
- Evaluating and Adapting

#### Module Nine: Managing the Change

- Developing a Change Management Plan
- Developing a Communication Plan
- Implementing the Plans
- Providing Constructive Criticism
- Encouraging Growth and Development

#### Module Ten: Overcoming Road Blocks

- Common Obstacles
- Re-Evaluating Goals
- Focusing on Progress

#### Module Eleven: Reaching the End

- How to Know When You've Achieved Success
- Transitioning
- Wrapping it All Up

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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# CONTRACT MANAGEMENT

## THE SUCCESS OF A CONTRACT IS IN THE DETAILS

It is easy to overlook the importance of contract management because it seems to be a boring, mundane topic. Contracts, however, are the basis of most business relationships. If contracts are managed well, business relationships will flourish. If they are not, companies as well as individuals face financial loss, relationship harm, and damaged reputations.

With this workshop you will learn the insides and outs of Contract Management. Contracts are made with vendors, employees, customers, partnerships, and these agreements must be managed carefully. In order to effectively implement Contract Management it is necessary to understand all the small details, and that is what you get with this workshop.

### Contract Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Defining Contract Management

- What is Contract Management?
- Contract Types
- Contract Elements
- Risks of Poor Contract Management
- Case Study

#### Module Three: Legal and Ethical Contract Management

- Contract Law I
- Contract Law II
- Defining Ethical Contract Management
- Ethical Breaches
- Case Study

#### Module Four: Contract Management Requests

- Choosing Potential Bidders
- RFPs and Technology
- Calculating Value
- Making a Choice
- Case Study

#### Module Five: How to Create a Contract

- Templates and Software
- Compliance
- Wordings
- Risks of Noncompliance
- Case Study

#### Module Six: Contract Negotiations

- Be Prepared
- Prioritize Terms
- Remain Professional
- Execute the Contract
- Case Study

#### Module Seven: Assess Performance

- What Performance Can Be Assessed
- Creating Metrics
- Measuring Performance
- Improving Performance
- Case Study

#### Module Eight: Relationships

- Qualities of Effective Relationships
- Relationship Pitfalls
- Building Trust
- Maintaining Relationships
- Case Study

#### Module Nine: Amending Contracts

- Redlines and Strikeouts
- Replacing Clauses
- Describing Amendments
- Amendment Status
- Case Study

#### Module Ten: Conducting Audits

- Why Audit?
- Plan
- Establishing Procedures
- Investigate and Report
- Case Study

#### Module Eleven: Renewing Contracts

- Involve Stakeholders
- Review
- Check for Accuracy and Changes
- Update or Cancel
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# CRISIS MANAGEMENT

## WHEN ALL IS WELL, IT'S ALL GOOD, BUT WHAT IF...

Crisis management is as important as finance management, personnel management, etc. Having a clear and effective program and plan for an event is critical not only to your survival, but critical to the profitability and possibly the survival of the company. Being able to identify risk, assess the situation and respond appropriately is important, and requires not only training, but practice.

With this Crisis Management workshop you will understand that a crisis can occur any time. You will develop skills needed for certain negative events. Also, you will be able to recognize warning signs to help avoid negative situations completely, or, if the situation occurs, better manage the crisis.

### Crisis Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Crisis

- Internal Risks
- External Risks
- Aggression
- Violence
- Case Study

#### Module Three: Workplace Violence

- Threats
- Damage
- Psychological Acts
- Physical Acts
- Case Study

#### Module Four: Myths

- Violence Just Happens
- It Is Uncommon
- Problems Will Solve Themselves
- It Is Not Possible to Prevent Violence
- Case Study

#### Module Five: Escalation

- Threats
- Stalking and Bullying
- Injury
- Death
- Case Study

#### Module Six: Concerning Behaviors

- Disruptive
- Emotional Abuse
- Causes Anxiety
- Examples of Behavior
- Case Study

#### Module Seven: Domestic Violence Indicators

- Disruptive Calls
- Poor Concentration
- Bruising
- Absences
- Case Study

#### Module Eight: Triggers of Workplace Violence

- Reprimands and Terminations
- Financial Strain
- Loss of Loved One
- Perceived Slights
- Case Study

#### Module Nine: Conflict Dangers

- Triggers
- Action Point
- Flashpoint
- Identify
- Case Study

#### Module Ten: Response

- Note Areas of Concern
- Discuss It
- Report It
- Report Extreme Cases to HR/Tip Line
- Case Study

#### Module Eleven: Strategies

- Policies
- Programs
- Emergency Procedures
- Train Employees
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# DEVELOPING A LUNCH & LEARN

## CREATING LOW COST TRAINING OPTIONS

Hosting a Lunch and Learn session is a low cost training option. It is a great way to introduce a topic or give a small demonstration on a new product or service. They are usually voluntary, thus attendance can sometimes be an issue, but with this workshop you will be given the knowledge to work through this issue and others.

Our Lunch and Learn workshop will give your organization a quick and useful tool to add to its training department. You can also use it as a follow-up or refresher to previous training sessions. It doesn't have to be just about a learning event, it can also involve collaboration, networking, or sharing best practices between employees.

### Developing a Lunch & Learn - Outline

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Action Plans and Evaluations

**Module Two: The Prep Work**

- Finding the Best the Location
- Setting up the Location
- Focus Group
- Practice
- Case Study

**Module Three: Creating the Content (I)**

- Picking the Right Topic
- Hands on Works Great
- Stay Focused
- Keep it Informal
- Case Study

**Module Four: Creating the Content (II)**

- Make It Interactive
- Review it Thoroughly
- Creating a Customized Presentation
- Back It Up!
- Case Study

**Module Five: During the Session**

- Ground Rules
- Quick Opening
- Parking Lot
- Adjusting on the Fly
- Case Study

**Module Six: Food and Facilities**

- Providing Food?
- People Bringing Their Own
- Eat During or After?
- Clean Up and Tear Down
- Case Study

**Module Seven: Take Away Material**

- Handouts and Take Away Material
- Quizzes or Self-Tests
- Website with Minutes and Session Notes
- Reference Material or White Paper
- Case Study

**Module Eight: Difficult Situations or People**

- Disruptions
- Food Issues
- Senior Management Buy In
- People Not Participating?
- Case Study

**Module Nine: What A Lunch and Learn is Not**

- Heavy or Serious Topics
- Required Training
- Replacement for Traditional Training
- Just a Free Lunch
- Case Study

**Module Ten: Best Practices (I)**

- Obtain Feedback and Tweak
- Utilize Star Employees
- Provide an Agenda Ahead of Time
- Keep the Session Casual and Loose
- Case Study

**Module Eleven: Best Practices (II)**

- Use it as a Refresher
- Networking Opportunity
- Upper Management Q&A Session
- Put it on a Regular Schedule
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
WILL  
LEARN

# HEALTH & WELLNESS AT WORK

## HEALTH & WELLNESS IS EVERYONE'S RESPONSIBILITY

A healthy employee is a happy and productive employee, which should be a goal for every organization. Through our Health and Wellness at Work program participants will experience the benefits of a healthier lifestyle and workplace.

Our Health and Wellness at Work course will be instrumental in creating a "Culture of Wellness" within your organization. We will touch on common issues such as smoking cessation, nutrition, weight loss, and preventative care. Health and Wellness is the responsibility of everyone in an organization so take the positive step and create a program within your organization.

### Health & Wellness at Work - Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: Meaning and Definition of a Health and Wellness Program**

- What is a Health and Wellness Program?
- Productivity
- Cost of Health Care
- Costs of Absenteeism
- Case Study

**Module Three: Types of Health Behavior Programs**

- Health Behaviors
- Health Screenings and Maintenance
- Mental Health
- Physical Injuries
- Case Study

**Module Four: Health Behavior Programs**

- Increasing Physical Activity
- Nutrition & Weight Loss
- Tobacco Cessation
- Substance Abuse Treatment
- Case Study

**Module Five: Health Screenings and Maintenance Programs**

- Preventative Care Screenings
- Cancer Screenings
- Annual Examinations
- Maintenance Programs
- Case Study

**Module Six: Mental Health Programs**

- Stress Management
- Support Groups
- Counseling
- Awareness & Education
- Case Study

**Module Seven: Evaluate the Need**

- Review Current Health and Wellness Programs
- Environmental Factors
- Identify Common Health Conditions and Procedures
- Review Company Information Pertaining to Employee Health
- Case Study

**Module Eight: Planning Process**

- Form a Health and Wellness Team or Committee
- Budget
- Define Goals
- Programs and Policies
- Case Study

**Module Nine: Implementation**

- Get Management Support
- Test It
- Get the Word Out
- Incentives
- Case Study

**Module Ten: Create a "Culture of Wellness"**

- Accessible Healthy Eating Options
- Give Them a Break
- Alcohol, Drug, and Smoke Free Work environment
- Eliminate Hazards
- Case Study

**Module Eleven: Evaluate Results**

- Check the Results
- Employee Satisfaction
- Share Achievements
- Revise Plans as Necessary
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# HIRING STRATEGIES

## HELP FINDING THAT DIAMOND IN THE ROUGH

Successful companies are made up of great employees, so why not hire great employees? Hiring and training employees is an expensive venture. Hiring the right person is more about skills and abilities; it is about finding the right combination of skills, attitude, and fit for your organization's culture.

Hiring Strategies will save your company time and money as you will be recruiting and hiring the right candidates. Your hiring department will benefit from this workshop as it prepares them to seek out that great candidate and make sure they are a fit for your company. You will obtain the necessary tools required in finding that diamond in the rough.

### Hiring Strategies - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Defining and Knowing the Position

- Know the Position
- Needs Analysis
- Job Analysis
- Task Analysis
- Case Study

#### Module Three: Hiring Strategy

- Company Information
- Salary Range
- Top Performers
- Be Prepared
- Case Study

#### Module Four: Lure in Great Candidates

- Advertise Where Candidates Visit
- Develop Corporate Citizenship
- Treat Your Candidates Well
- Look at the Competition
- Case Study

#### Module Five: Filtering Applicants to Interview

- Put Lots of Weight on Cover Letters
- Grading Resumes
- Internet Search
- Initial Phone Interview
- Case Study

#### Module Six: The Interview (I)

- Introduce Everyone
- Use a Panel
- Match the Interview to the Job
- Types of Questions
- Case Study

#### Module Seven: The Interview (II)

- Tell Me About My Company
- Distractions
- Interview More Than Once
- Wrap Up
- Case Study

#### Module Eight: Selection Process (I)

- Testing
- Look for Passion and Enthusiasm
- Background Checks
- Trust Your Instincts
- Case Study

#### Module Nine: Selection Process (II)

- Education Level Vs. Experience
- Have a Consensus
- Keep Non-Hires on File
- Checking References
- Case Study

#### Module Ten: Making an Offer

- Do it Quickly
- Employment Details
- Notify Rejected Candidates
- Be Creative
- Case Study

#### Module Eleven: Onboarding

- Training and Orientation
- Mentoring
- 30 60 90 Day Reviews
- Make Them Feel Welcome
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# HUMAN RESOURCES MANAGEMENT

## KEY UNDERSTANDING OF HUMAN RESOURCES, WITH OR WITHOUT A HR DEPARTMENT

Recently tasks that were originally thought to fall under the responsibility of the human resources department have become a part of many managers' job descriptions. The sharing and diffusion of these tasks throughout the organization has had an impact particularly on those that are not equipped with the skills or knowledge to deal with these issues.

The Human Resource Management workshop will give managers the basic tools to handle numerous human resource situations such as interviewing, orientation, safety, harassment, discrimination, violence, discipline, and termination. This workshop will provide participants those skills and assist them with many Human Resource situations.

### Human Resource Management - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: A History of Human Resources

- A Brief History
- What is Human Resources Today?

#### Module Three: The Interview Process

- The General Format
- Types of Questions
- Do's and Don'ts

#### Module Four: Employee Orientation

- The Orientation Process
- The Role of Management and the Role of Human Resources
- Tips and Tricks

#### Module Five: Following Up with New Employees

- Daily Checklist for the First Week
- Following Up at the End of the Week
- Weeks and Months Later

#### Module Six: Workplace Safety

- Understanding Your Role and Responsibilities
- Understanding Local Rules
- Understanding Industry-Specific Rules

#### Module Seven: Dealing with Harassment And Discrimination

- Defining Harassment
- Types of Workplace Discrimination
- A Manager's Responsibility
- An Employer's Responsibility

#### Module Eight: Workplace Violence

- Defining Violence
- A Manager's Responsibility
- An Employer's Responsibility

#### Module Nine: Managing Employee Performance

- Choosing the Time and Place For Feedback
- Types of Employee Appraisals
- Using the Feedback Sandwich
- Encouraging Growth and Development

#### Module Ten: Disciplining Employees

- Understanding Your Role
- Understanding Your Choices
- Having the Meeting
- Following Up

#### Module Eleven: Terminating Employees

- Documenting Events
- Preparing for the Decision
- Making the Decision
- Communicating the Decision

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# MEASURING RESULTS FROM TRAINING

## YOU CAN'T PUT A DOLLAR VALUE ON SOME TOPICS & THEIR BENEFITS

Although we all know that training can have many amazing benefits, sometimes it can be hard to prove those benefits with a dollar value to training. Some topics, like sales training or time management, might have direct, tangible benefits. Other topics, like communication or leadership, might have benefits that you can't put a dollar value on.

With this Measuring Results From Training course, you will learn about the different ways to evaluate training progress, and how to use those results to demonstrate the results that training brings. Then, once you have evaluated your own training, the next step is to modify and update the curriculum to create content better suited for your needs.

### Measuring Results From Training - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Kolb's Learning Styles

- The Four-Stage Process
- Accommodators
- Divergers
- Convergers
- Assimilators

#### Module Three: Kirkpatrick's Levels of Evaluation Overview

- Level One: Reactions
- Level Two: Learning
- Level Three: Behavior
- Level Four: Results

#### Module Four: Types of Measurement Tools

- Goal Setting
- Self-Evaluations
- Peer Evaluations
- Supervisor Evaluations
- High-Level Evaluations

#### Module Five: Focusing the Training

- Performing a Needs Assessment
- Creating Learning Objectives
- Drilling Down Into Content

#### Module Six: Creating an Evaluation Plan

- What Will We Evaluate?
- When Will the Evaluation be Completed?
- How Will We Evaluate It?
- Who Will Perform the Evaluation?

#### Module Seven: Assessing Learning before Training

- Workplace Observation
- Objectives Assessment
- Pre-Assignments and Pre-Tests

#### Module Eight: Assessing Learning during Training

- Reviewing Learning Objectives
- Performing Hip-Pocket Assessments
- Quizzes and Tests
- Skill Assessments

#### Module Nine: Assessing Learning after Training

- Evaluation Timelines
- Learning Journal
- Goal Setting
- Additional Methods of Evaluation

#### Module Ten: The Long Term View

- Creating a Long Term Evaluation Plan
- Methods of Evaluation
- Documenting Lessons Learned

#### Module Eleven: Calculating the Return on Investment (ROI)

- A Basic ROI Formula
- Identifying and Measuring Tangible Benefits
- Identifying and Measuring Intangible Benefits
- Calculating Total Costs
- Making a Business Case

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# MILLENNIAL ONBOARDING

## PREPARING FOR A PRODUCTIVE, HAPPY & SKILLED WORKFORCE

Onboarding new employees is a secure investment that will assist newly hired employees in developing their skills, knowledge, and value within the company. It will help match the technically skilled Millennial workforce with new and emerging needs of your company, which gives your company an advantage within the market.

Millennial Onboarding is a specialized type of employee onboarding. With Millennials we are seeing a need to tweak the onboarding process to better suit the needs of the company and new hires. It will increase productivity and produce a happier and more skilled workforce. The new hire phase is a critical time for the employee and company and having a structured set of procedures will make this time run smoother and produce a greater chance of success.

### Millennial Onboarding - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: Purpose Of Onboarding

- Start-Up Costs
- Employee Anxiety
- Employee Turnover
- Realistic Expectations
- Case Study

#### Module Three: Introduction

- Why Onboarding?
- Importance Of Onboarding
- Making Employees Feel Welcome
- First Day Checklist
- Case Study

#### Module Four: Millennia's And Onboarding

- Who Are Millennials?
- How Do Millennials Differ From Other Employees?
- Investiture Socialization – Let Them Be Themselves
- Informal Rather Than Formal Onboarding Processes
- Case Study

#### Module Five: Onboarding Checklist

- Pre-Arrival
- Arrival
- First Day
- First Week
- First Month
- Case Study

#### Module Six: Engaging the Millennial Employee

- Create An Informal Program Rather Than A Formal One
- Engage Employees One On One
- Role of Human Resources
- Role of Managers
- Case Study

#### Module Seven: Following Up with the Millennial Employee

- Initial Check In – One on One
- Following Up – Regular, Informal Follow Ups
- Setting Schedules – Millennials and Work/Life
- Mentoring the Millennial
- Case Study

#### Module Eight: Setting Expectations with the Millennial Employee

- Define Requirements – Provide Specific Instructions
- Identify Opportunities for Improvement and Growth
- Set Verbal Expectations – Specific, Clear, Systematic
- Put It In Writing – Specific, Clear, Systematic
- Case Study

#### Module Nine: Mentoring the Millennial Employee

- Be Hands-On and Involved
- Serial Mentoring
- Be a Mentor, Not an Authority Figure
- Focus Millennials' Exploratory Drive on Work
- Case Study

#### Module Ten: Assigning Work to the Millennial Employee

- Provide Clear Structure and Guidelines
- Provide Specific Benchmarks
- Set Boundaries and Provide Reality Checks
- Guide, Don't Dictate
- Case Study

#### Module Eleven: Providing Feedback

- Millennials Thrive on Feedback
- Characteristics of Good Feedback
- Informal Feedback
- Formal Feedback
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations



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# TALENT MANAGEMENT

## UNDERSTANDING, HIRING & MANAGING THE BEST EMPLOYEES

Every company wants to have the best and brightest employees, and with Talent Management that can be achieved. With a company's workforce generally being its highest cost, does it not make sense to invest in it? With Talent Management you are developing a more skilled workforce, and attracting better and more skilled new hires.

We all know that training and retraining is expensive, and our Talent Management workshop will reduce these costs. Recruiting the correct people, and keeping a talented workforce is a priority. Having a talented group of employees has always been a key to success; it will translate into better performance and higher productivity. Talent Management is the investment that will pay dividends for years to come.

### Talent Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Defining Talent

- What is Talent Management
- Types of Talent
- Skills and Knowledge Defined

#### Module Three: Understanding Talent Management

- Guidelines
- Importance & Benefits
- Challenges
- Key Elements to Developing a Winning Strategy

#### Module Four: Performance Management

- Performance Management Defined
- Benefits
- How to Keep Your Employees Motivated
- Case Study

#### Module Five: Talent Reviews

- 360 Degree Feedback
- Talent Calibration
- Maintaining an Effective Work Force
- Looking to the Future

#### Module Six: Succession & Career Planning

- What is Succession Planning?
- Developing a Plan
- Executing the Plan
- Overcoming Roadblocks
- Case Study

#### Module Seven: Engagement

- Employee Engagement
- Generating Engagement
- Influences
- Case Study

#### Module Eight: Competency Assessments

- Competency Assessment Defined
- Implementation
- Final Destination
- Case Study

#### Module Nine: Training & Development

- Setting Goals
- Developing Options
- Providing Feedback
- Wrapping Up

#### Module Ten: Do's and Don'ts

- o's & Don'ts
- Tips for Talent Management
- Case Study

#### Module Eleven: Employee Retention

- Goals and Motivation
- The Expectancy Theory
- Object Oriented Theory
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# TRAIN THE TRAINER

## APPLYING SKILLS, KNOWLEDGE & ATTITUDES

Whether you are preparing to be a professional trainer, or you are someone who does a bit of training as a part of your job, you always want to be prepared. You must understand that training is a process where skills, knowledge, and attitudes are applied in a unique way.

Our Train-The-Trainer workshop will provide you the skills to help you deliver engaging and compelling workshops. Skills such as facilitating, needs analysis, and managing tough topics will give you what you require to become a trainer yourself, and train others if wanted.

### Train-The-Trainer - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Training and Facilitation

- What is Training?
- What is Facilitation?
- Identifying Appropriate Situations for Each

#### Module Three: Gathering Materials

- Identifying Participants' Needs
- Reviewing the Materials
- Identifying and Resolving Gaps

#### Module Four: Creating a Lesson Plan

- Planning for the Basics
- Adding Slack Time
- Creating a Plan B
- A Take-Home Template

#### Module Five: Choosing Activities

- Types of Activities
- Creating a Tickle Trunk
- What To Do When Games Go Wrong

#### Module Six: Preparing for the Workshop

- Creating a Materials List
- Gathering Participant Information
- Setting up the Physical Location

#### Module Seven: Getting off on the Right Foot

- Greeting Participants
- Being Prepared
- Using Icebreakers

#### Module Eight: Delivery Tips and Tricks

- Using Visual Aids
- Creating Supporting Materials
- Gauging When It's Time For A Break

#### Module Nine: Keeping it Interactive

- Encouraging Discussion
- Using Group Work
- The Power of Post-It Notes

#### Module Ten: Dealing with Difficult Participants

- The Ground Rules
- Challenges and Solutions
- Handling Interruptions

#### Module Eleven: Tackling Tough Topics

- Tough Stuff to Watch Out For
- Adjusting Your Material for a Sensitive Issue
- Dealing with Sensitive Issues in the Workshop

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
WILL  
LEARN

# UNIVERSAL SAFETY PRACTICES

## IT JUST CANNOT BE IGNORED

The importance of safety cannot be overstated. Every organization is responsible for the safety of employees while they are working. Understanding universal safety practices and how to implement them will help keep everyone protected while ensuring the company's financial security.

With our Universal Safety Practices workshop, you and your team members will discover how safety affects employee engagement and the bottom line. Safety may seem like a boring topic, but an unsafe work environment cannot be ignored.

### Universal Safety Practices - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: The Importance of Safety**

- Legal Responsibilities
- Risks
- Benefits
- Setting the Example
- Case Study

**Module Three: Fire Risk**

- Causes and Types
- Assessment
- Prevention
- Communication
- Case Study

**Module Four: Sound**

- Levels of Noise
- Assessment
- Risks
- Personal Protective Equipment (PPE) & Environmental Changes
- Case Study

**Module Five: Chemical and Electrical Hazards**

- Assess Chemicals Used
- Inform
- Control Exposure
- Electrical Dangers
- Policies and Controls
- Case Study

**Module Six: Ergonomics**

- Common Ergonomic Related Injuries
- Assess Risks
- Equipment Changes
- Training
- Case Study

**Module Seven: Workplace Violence**

- Identify Stressors and Triggers
- Substance Abuse
- Report Policies
- Training and Emergency Plans
- Case Study

**Module Eight: Transportation**

- Assess Transportation
- Onsite
- Off-site
- Policies to Prevent Injury
- Case Study

**Module Nine: Machinery**

- Identify Machines and Their Risks
- Establish Safeguards
- Limit Use
- Care and Maintenance
- Case Study

**Module Ten: Safety Program**

- Risk Assessment
- Establish Goals and Objectives
- Develop Policies and Procedures
- Training
- Case Study

**Module Eleven: Monitoring**

- Establish Target KPIs
- Audits and Inspections
- Reports of Incidents
- Assess Data
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# WORKPLACE DIVERSITY

## STRATEGIES TO BE PROACTIVE & REMOVE BARRIERS

Improving diversity knowledge is a required component of every company. With more and more businesses having global presence workplace diversity is a forgone conclusion. You will be able to use strategies to be proactive and remove barriers. You will be shown how to build and encourage diversity in your workplace and community.

Our Workshop Diversity course will help you better understand what diversity is, and how you can create a more diverse environment. You will be instructed on how to use active listening and employ effective questioning techniques. By learning the right complaint resolution skills and choosing the right course of action communication throughout your business will be strengthened.

### Workplace Diversity - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: Understanding Diversity**

- What is Diversity?
- Related Terms and Concepts
- A Brief History
- A Legal Overview

**Module Three: Understanding Stereotypes**

- Stereotypes vs. Biases
- Identifying Your Baggage
- Understanding What This Means

**Module Four: Breaking Down the Barriers**

- Changing Your Personal Approach
- Encouraging Workplace Changes
- Encouraging Social Changes

**Module Five: Verbal Communication Skills**

- Listening and Hearing: They Aren't the Same Thing
- Asking Questions
- Communicating with Power

**Module Six: Non-Verbal Communication Skills**

- Body Language
- The Signals You Send to Others
- It's Not What You Say, It's How You Say It

**Module Seven: Being Proactive**

- Encouraging Diversity in the Workplace
- Preventing Discrimination

**Module Eight: Coping with Discrimination**

- Identifying if You Have Been Discriminated Against
- Methods of Reprisal
- Choosing a Course of Action

**Module Nine: Dealing with Diversity Complaints as a Person**

- What To Do If You're Involved In A Complaint
- Understanding Your Role
- Creating a Support System

**Module Ten: Dealing with Diversity Complaints as a Manager**

- Recording the Complaint
- Identifying Appropriate Actions
- Choosing a Path

**Module Eleven: Dealing with Diversity Complaints as an Organization**

- Receiving a Complaint
- Choosing a Response
- Learning from the Complaint

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# WORKPLACE HARASSMENT

## HOW TO MANAGE, PREVENT AND STOP HARASSMENT

Harassment can be based on a variety of factors such as race, sex, and disability. Experiencing an uncomfortable situation in the workplace may be more than an unpleasant event: it may be against the law. This alone is what makes this topic very important for every organization.

Our Workplace Harassment workshop will give participants the tools to recognize harassment when it occurs. It will help them understand their rights and responsibilities, and create a safe environment for all. Through this workshop you will recognize that it is necessary for everyone to identify harassment and exercise anti-harassment policies.

### Workplace Harassment - Course Outline

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: The Background**

- The Law
- Identifying Harassment
- Anti-Harassment Policies

**Module Three: Developing an Anti-Harassment Policy**

- An Anti-Harassment Policy: What Should Be Covered
- How Model Policies Work
- Steps to a Healthy Work Place
- Educating Employees

**Module Four: Policies in the Workplace**

- Anti-Harassment Policy Statements
- Employee's Rights and Responsibilities
- Employer's Rights and Responsibilities

**Module Five: Proper Procedures in the Workplace**

- If You are Being Harassed
- If You are Accused of Harassing
- The Investigation
- Remedies

**Module Six: False Allegations**

- How to Address the Situation
- Confidentiality
- Monitoring the Situation
- Retaliation
- Appeals

**Module Seven: Other Options**

- Union Grievance Procedures
- Mediation: Getting Help from Outside Organization

**Module Eight: Sexual Harassment**

- Defining Sexual Harassment
- Elements of Harassment
- Common Scenarios

**Module Nine: Mediation**

- What is Mediation
- Deciding if it is Right
- How to Implement

**Module Ten: Conflict Resolution**

- How to Resolve the Situation
- Seeing Both Sides
- Deciding the Consequence

**Module Eleven: The Aftermath**

- How to Move On
- Monitoring the Situation
- Learning from Mistakes

**Module Twelve: Wrapping Up**

- Words from the Wise
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- Completion of Action Plans and Evaluations

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# WORKPLACE VIOLENCE

## APPROPRIATE TRAINING IS ESSENTIAL TO THE SAFETY OF ALL EMPLOYEES

Workplace harassment must be identified, discouraged, and prevented in order to keep a hostile work environment from developing. Left unchecked, harassment can escalate into violence. Workplace violence and harassment training is essential to the safety of all employees.

In order to prevent Workplace Violence, it is essential that everyone is able to identify individuals who may be prone to violence. Our workshop will help participants recognize certain behaviors, and lower the risk of escalated situations. This workshop will help you identify the warning signs, as well as give you coping and response tools.

### Workplace Violence - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is Workplace harassment?

- How to Identify
- Costs to your business

#### Module Three: Identifying The Bully

- Abusive Workplace Behaviors
- Bullying and Personality Disorders
- Narcissism

#### Module Four: How to Handle Workplace Violence

- Types of Behavior
- Target the Behavior, Not the Person
- Implement an Action Plan

#### Module Five: Risk Assessment (I)

- Understanding Anger and Aggression
- Defusing & De-escalating Strategies
- Communication Skills
- Tactical Options

#### Module Six: Risk Assessment (II)

- Identifying the Hazard
- Assessing the Risk
- Controlling the Risk
- Evaluating & Review

#### Module Seven: Being the Victim

- What Is Not Considered Bullying
- Steps to take

#### Module Eight: Checklist for Employers

- 4 Step Process
- Addressing all Employees
- Code of Ethics
- Policy and Procedures

#### Module Nine: Interview Process

- Identify a Bully in the Interview Process
- Warning Signs
- Role Play
- Case Study

#### Module Ten: Investigation Process

- Advising your Supervisor
- Lodging the Complaint
- Initial Response
- The Investigation
- The Findings
- Review & Closure

#### Module Eleven: Developing a Workplace Harassment Policy

- Scope
- Philosophy
- Principles
- Intent
- Options
- Informal Complaint Process
- Formal Investigation process

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# WORKPLACE ESSENTIALS

# APPRECIATIVE INQUIRY

## A TOOL FOR CHANGE, ABLE TO TRANSFORM

Organizations can be thought of as a living being made up of the individuals working within it. Appreciative Inquiry has the ability to change the whole organization by changing the people. Through positive questioning employees will be directed to move in a positive direction. Recognizing the strengths and values of what works, as opposed to what's wrong will transform the individuals and in turn transform the organization.

Appreciative Inquiry is a shift from looking at problems and deficiencies and instead focusing on strengths and successes. It is a tool for change, and it will strengthen relationships throughout your business. Through best practices and positive stories you will transform your organization.

### Appreciative Inquiry - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Introducing Appreciative Inquiry

- What is Appreciative Inquiry?
- Generating a Better Future
- Engaging People in Positive Thought
- Change the Person, Change the Organization
- Case Study

#### Module Three: Changing the Way You Think

- Shifting from "What's Wrong?" to "What's Right"?
- It's Not Eliminating Mistakes, It's Holding Up Successes
- Positive Language Will Affect Peoples Thinking
- Limit or Remove Negative Phrasing
- Case Study

#### Module Four: Four D model

- Discovery
- Dream
- Design
- Delivery
- Case Study

#### Module Five: The Four I Model

- Initiate
- Inquire
- Imagine
- Innovate
- Case Study

#### Module Six: Appreciative Inquiry Interview Style

- Framing Positive Questions
- Solicit Positive Stories
- Finding Out What Works
- Recognize the Reoccurring Themes
- Case Study

#### Module Seven: Anticipatory Reality

- Imagining a Successful Future Will Affect the Present
- Controlling Negative Anticipation
- Current Decisions Will Be Influenced Positively
- Base It on Data and Real Examples
- Case Study

#### Module Eight: The Power of Positive Imagery

- Shaping Performance with Positive Imagery
- Being Better Prepared for Adversity
- People are More Flexible and Creative
- Think of the Perfect Situation
- Case Study

#### Module Nine: Influencing Change Through Appreciative Inquiry (AI)

- Using Strengths to Solve Challenges
- Confidence Will Promote Positive Change
- Inquiry is a Seed of Change
- People Will Gravitate Towards What is Expected of Them
- Case Study

#### Module Ten: Coaching and Managing With AI

- Build Around What Works
- Focus on Increases
- Recognize the Best in People
- Limit or Remove Negative Comments
- Case Study

#### Module Eleven: Creating a Positive Core

- Strengths
- Best Practices
- Peak Experiences
- Successes
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
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- Lessons Learned
- Completion of Action Plans and Evaluations



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# BUSINESS ACUMEN

(CLEVERNESS)

## SAVYNESS & QUICKNESS IN UNDERSTANDING AND DEALING WITH ANY BUSINESS SITUATION

Through this powerful Business Acumen workshop you will improve your judgment and decisiveness skills. Business Acumen is all about seeing the big picture and recognizing that all decisions no matter how small can have an effect on the bottom line. You and your teammates will increase your financial literacy and improve your business sense.

Business Acumen will give you and your team an advantage everyone wishes they had. The workshop will help you recognize learning events, manage risk better, and increase your critical thinking. Business Acumen has the ability to influence your whole organization, and provide that additional edge that will lead to success.

### Business Acumen - Course Outline

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

**Module Two: Seeing the Big Picture**

- Short and Long Term Interactions
- Recognize Growth Opportunities
- Mindfulness of Decisions
- Everything is Related
- Case Study

**Module Three: KPI's (Key Performance Indicators)**

- Decisiveness
- Flexible
- Strong Initiative
- Intuitive
- Case Study

**Module Four: Risk Management Strategies**

- Continuous Assessment
- Internal and External Factors
- Making Adjustments and Corrections
- Knowing When to Pull the Trigger or Plug
- Case Study

**Module Five: Recognizing Learning Events**

- Develop a Sense of Always Learning
- Evaluate Past Decisions
- Problems are Learning Opportunities
- Recognize Your Blind Spots
- Case Study

**Module Six: You Need to Know These Answers and More**

- What Makes My Company Money?
- What Were Sales Last Year?
- What is our Profit Margin?
- What Were Our Costs?
- Case Study

**Module Seven: Financial Literacy (I)**

- Assets
- Financial Ratios
- Liabilities
- Equity
- Case Study

**Module Eight: Financial Literacy (II)**

- Income Statement
- Balance Sheet
- Cash Flow Statement
- Read, Read, and Read
- Case Study

**Module Nine: Business Acumen in Management**

- Talent Management
- Change Management
- Asset Management
- Organizational Management
- Case Study

**Module Ten: Critical Thinking in Business**

- Ask the Right Questions
- Organize the Data
- Evaluate the Information
- Make the Decision
- Case Study

**Module Eleven: Key Financial Levers**

- Investing in People
- Effective Communication
- Process Improvement
- Goal Alignment
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
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- Lessons Learned
- Completion of Action Plans and Evaluations

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# BUSINESS ETHICS

## PROPER ETHICS FOSTER SUCCESS & PROFITABILITY

A company's ethics will determine its reputation. Good business ethics are essential for the long-term success of an organization. Implementing an ethical program will foster a successful company culture and increase profitability. Developing a Business Ethics program takes time and effort, but doing so will do more than improve business, it will change lives.

A company's ethics will have an influence on all levels of business. It will influence all who interact with the company including customers, employees, suppliers, competitors, etc. All of these groups will have an effect on the way a company's ethics are developed. It is a two-way street; the influence goes both ways, which makes understanding ethics a very important part of doing business today. Ethics is very important, as news can now spread faster and farther than ever before.

### Business Ethics - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is Ethics?

- What is Business Ethics
- 10 Benefits of Managing Ethics
- Case Study

#### Module Three: Implementing Ethics in the Workplace

- Benefits
- Guidelines for Managing Ethics in the Workplace
- Roles and Responsibilities

#### Module Four: Employer / Employee Rights

- Privacy Policies
- Harassment Issues
- Technology

#### Module Five: Business and Social Responsibilities

- Identifying Types of Responsibilities
- Case Study
- Handling Conflicting Social and Business Responsibilities
- Case Study

#### Module Six: Ethical Decisions

- The Basics
- Balancing Personal and Organizational Ethics
- Common Dilemmas
- Making Ethical Decisions
- Overcoming Obstacles

#### Module Seven: Whistle Blowing

- Criteria and Risk
- The Process
- When You Should "Blow the Whistle"

#### Module Eight: Managerial Ethics

- Ethical Management
- Identifying the Characteristics
- Ensuring Ethical Behavior

#### Module Nine: Unethical Behavior

- Recognize and Identify
- Preventing
- Addressing
- Interventions

#### Module Ten: Ethics in Business (I)

- Organization Basics
- Addressing the Needs
- Ethical Principles

#### Module Eleven: Ethics in Business (II)

- Ethical Safeguards
- Developing a Code of Ethics
- Performing an Internal Ethics Audit
- Upholding the Ethics Program

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# BUSINESS ETIQUETTE

## KNOW WHAT TO DO, IN ANY OCCASION AND ANYWHERE YOU MAY BE

This course examines the basics, most importantly to be considerate of others, dress/appearance, the workplace versus social situations, business meetings, proper introductions and “the handshake”, conversation skills/small talk, cultural differences affecting international business opportunities, dealing with interruptions, and proper business email and telephone etiquette.

Have you ever been in a situation where:

- *You met someone important and had no idea what to say or do?*
- *You spilled soup all over yourself at an important business event?*
- *You showed up at an important meeting under or overdressed?*

Let's face it: we've all had those embarrassing etiquette gaffes. Our Business Etiquette workshop will help your participants look and sound their best no matter what the situation.

### Business Etiquette - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Etiquette

- Etiquette Defined
- The Importance of Business Etiquette

#### Module Three: Networking for Success

- Creating an Effective Introduction
- Making a Great First Impression
- Minimizing Nervousness
- Using Business Cards Effectively
- Remembering Names

#### Module Four: The Meet and Greet

- The Three-Step Process
- The Four Levels of Conversation

#### Module Five: The Dining in Style

- Understanding Your Place Setting
- Using Your Napkin
- Eating Your Meal
- Sticky Situations and Possible Solutions

#### Module Six: Eating Out

- Ordering in a Restaurant
- About Alcoholic Beverages
- Paying the Bill
- Tipping

#### Module Seven: Business Email Etiquette

- Addressing Your Message
- Grammar and Acronyms
- Top 5 Technology Tips

#### Module Eight: Telephone Etiquette

- Developing an Appropriate Greeting
- Dealing with Voicemail
- Cell phone Do's and Don'ts

#### Module Nine: The Written Letter

- Thank You Notes
- Formal Letters
- Informal Letters

#### Module Ten: Dressing for Success

- The Meaning of Colors
- Interpreting Common Dress Codes
- Deciding What to Wear

#### Module Eleven: International Etiquette

- General Rules
- Important Points
- Preparation Tips

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# CHANGE MANAGEMENT

## CHANGES ARE A FACT OF LIFE. LEARN TO BETTER HANDLE THEM & BENEFIT FROM THEM

Change is a constant in our lives and work. All around us, technologies, processes, people, ideas, and methods often change, affecting the way we perform daily tasks and live our lives. Having a smooth transition when change occurs is important in any situation and you will gain some valuable skills through this workshop.

The Change Management workshop will give any leader tools to implement changes more smoothly and to have those changes better accepted. This workshop will also give all participants an understanding of how change is implemented and some tools for managing their reactions to change.

### Change Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Preparing for Change

- Defining Your Strategy
- Building the Team

#### Module Three: Identifying the WIIFM

- What's In It For Me?
- Building Support

#### Module Four: Understanding Change on an Individual Level

- Clearing
- Programming
- Processing

#### Module Five: Leading and Managing the Change

- Preparing and Planning
- Delegating
- Keeping the Lines of Communication Open
- Coping with Pushback

#### Module Six: Gaining Support

- Gathering Data
- Addressing Concerns and Issues
- Evaluating and Adapting

#### Module Seven: Making it all Worthwhile

- Leading Status Meetings
- Celebrating Successes
- Sharing the Results and Benefits

#### Module Eight: Using Appreciative Inquiry

- The Four Stages
- The Purpose of AI
- Examples and Case Studies

#### Module Nine: Bringing People to Your Side

- A Dash of Emotion
- Plenty of Facts
- Bringing it All Together

#### Module Ten: Building Resiliency

- What is Resiliency?
- Why is it Important?

#### Module Eleven: Building Flexibility

- What is Flexibility?
- Why is it Important?
- Five Easy Steps for the Leader and the Individual

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# CIVILITY IN THE WORKPLACE

## PROTECT YOUR BOTTOM LINE WITH BASIC SOCIAL VALUES

While a training program on workplace manners and courtesy may seem like overkill, the reality is: rudeness is an epidemic costing industry millions a year. Indeed, what society seems to be gaining in terms of both knowledge and technological advancement, it's losing out on basic social values that directly impact the bottom line.

To address the growing problem of incivility in the work setting, this workshop introduces the concept of civility, its importance to a company, as well as its typical causes and effects. Skills needed to effectively practice civil behavior, as well as different ways organizations can systematize civility in the workplace will also be discussed. The benefits to Civility In The Workplace are countless and will pay off immensely in every aspect of your work.

### Civility In The Workplace - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Introduction

- What is Uncivil Behavior?
- Three Reasons Why You Should be Civil
- Dealing with Difficult Personalities
- Costs and Rewards
- Case Study

#### Module Three: Effective Work Etiquette

- Greetings
- Respect
- Involvement
- Being Politically Correct
- Case Study

#### Module Four: Costs and Rewards

- Incivility and the Costs
- Civility and the Rewards
- Four Causes of Incivility
- How to Overcome It
- Case Study

#### Module Five: Conflict Resolution

- Collaborating
- Competing
- Compromising
- Accommodating
- Avoiding
- Case Study

#### Module Six: Getting to the Cause

- Examining the Root Cause
- Creating a Cause and Effect Diagram
- Forgiveness
- Benefits of Resolution
- Case Study

#### Module Seven: Communication

- Para-verbal Communication
- Non-Verbal Communication
- Listening Skills
- Appreciative Inquiry
- Case Study

#### Module Eight: Negotiation

- Three Sides to Incivility
- Mediation
- Arbitration
- Creative Problem Solving
- Case Study

#### Module Nine: Identifying Your Need

- Completing a Needs Analysis
- Focus Groups
- Observations
- Anonymous Surveys
- Case Study

#### Module Ten: Writing a Civility Policy

- Designating the Core Group
- Defining What is Unacceptable Behavior
- Defining the Consequence
- Writing the Policy
- Case Study

#### Module Eleven: Implementing the Policy

- The First Steps
- Training
- Addressing Complaints
- Enforcing Violators
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# CONFLICT RESOLUTION

## Conflict Resolution - Course Outline

### UN-RESOLVED CONFLICT MAY LEAD TO LOST PRODUCTION, REVENUE, AND EVEN LAWSUITS

Wherever two or more people come together, there is bound to be conflict. This course will give you a seven-step conflict resolution process that they can use and modify to resolve conflict disputes of any size. You will also be provided a set of skills in solution building and finding common ground.

In this Conflict Resolution workshop, you will learn crucial conflict management skills, including dealing with anger and using the Agreement Frame. Dealing with conflict is important for every organization no matter the size. If it is left unchecked or not resolved it can lead to lost production, absences, attrition, and even law suits.

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: An Introduction to Conflict Resolution

- What is Conflict?
- What is Conflict Resolution?
- Understanding the Conflict Resolution Process

#### Module Three: The Thomas-Kilmann Instrument

- Collaborating
- Competing
- Compromising
- Accommodating
- Avoiding

#### Module Four: Creating an Effective Atmosphere

- Neutralizing Emotions
- Setting Ground Rules
- Choosing the Time and Place

#### Module Five: Creating Mutual Understanding

- What Do I Want?
- What Do They Want?
- What Do We Want?

#### Module Six: Focusing on Individual Needs

- Finding Common Ground
- Building Positive Energy and Goodwill
- Strengthening Your Partnership

#### Module Seven: Getting to the Root Cause

- Examining Root Causes
- Creating a Cause and Effect Diagram
- The Importance of Forgiveness
- Identifying the Benefits of Resolution

#### Module Eight: Generating Options

- Generate, Don't Evaluate
- Creating Mutual Gain Options and Multiple Option Solutions
- Digging Deeper into Your Options

#### Module Nine: Building a Solution

- Creating Criteria
- Creating a Shortlist
- Choosing a Solutions
- Building a Plan

#### Module Ten: The Short Version of the Process

- Evaluating the Situation
- Choosing Your Steps
- Creating an Action Plan
- Using Individual Process Steps

#### Module Eleven: Additional Tools

- Stress and Anger Management Techniques
- The Agreement Frame
- Asking Open Questions

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# CUSTOMER SERVICE

## A PREDOMINANT ASPECT OF EVERY BUSINESS, EVERY PRODUCT, EVERY SERVICE

Each and every one of us serves customers, whether we realize it or not. Maybe you're on the front lines of a company, serving the people who buy your products. Perhaps you're an accountant, serving the employees by producing their pay checks and keeping the company running. Or maybe you're a company owner or entrepreneur serving your staff and your customers.

This Customer Service workshop will look at all types of customers and how we can serve them better and improve ourselves in the process. You will be provided a strong skillset including in-person and over the phone techniques, dealing with difficult customers, and generating return business.

### Customer Service - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Who You Are and What You Do

- Who Are Customers? (internal/external)
- What is Customer Service?
- Who Are Customer Service Providers?

#### Module Three: Establishing Your Attitude

- Appearance Counts!
- The Power of a Smile
- Staying Energized
- Staying Positive

#### Module Four: Identifying and Addressing Their Needs

- Understanding the Customer's Problem
- Staying Outside the Box
- Meeting Basic Needs
- Going the Extra Mile

#### Module Five: Generating Return Business

- Following Up
- Addressing Complaints
- Turning Difficult Customers Around

#### Module Six: In-Person Customer Service

- Dealing With At-Your-Desk Requests
- The Advantages and Disadvantages of In-Person Communication
- Using Body Language to Your Advantage

#### Module Seven: Giving Customer Service over the Phone

- The Advantages and Disadvantages of Telephone Communication
- Telephone Etiquette
- Tips and Tricks

#### Module Eight: Providing Electronic Customer Service

- The Advantages and Disadvantages of Electronic Communication
- Understanding Netiquette
- Tips and Tricks
- Examples: Chat or e-mail

#### Module Nine: Recovering Difficult Customers

- De-Escalating Anger
- Establishing Common Ground
- Setting Your Limits
- Managing Your Own Emotions

#### Module Ten: Understanding When to Escalate

- Dealing with Vulgarity
- Coping with Insults
- Dealing with Legal and Physical Threats

#### Module Eleven: Ten Things You Can Do To WOW Every Time

- Ten Tips

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# CYBER SECURITY

## THE ABILITY TO PROTECT YOUR INFORMATION IS ESSENTIAL TO YOUR SUCCESS

Every organization is responsible for ensuring its own Cyber Security. The ability to protect its information systems from impairment or even theft is essential to success. Implementing effective security measures will not only offer liability protection, it will also increase efficiency and productivity.

With this Cyber Security workshop you will understand the different types of malware and security breaches, and be able to develop effective prevention methods which will increase overall security. You will of course better understand the basic concepts associated with Cyber Security and what your company needs to stay secure.

### Cyber Security - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Cyber security Fundamentals

- What is Cyberspace?
- What is Cyber security?
- Why is Cyber security Important?
- What is a Hacker?
- Case Study

#### Module Three: Types of Malware

- Worms
- Viruses
- Spyware
- Trojans
- Case Study

#### Module Four: Cyber Security Breaches

- Phishing
- Identity Theft
- Harassment
- Cyberstalking
- Case Study

#### Module Five: Types of Cyber Attacks

- Password Attacks
- Denial of Service Attacks
- Passive Attack
- Penetration Testing
- Case Study

#### Module Six: Prevention Tips

- Craft a Strong Password
- Two-Step Verification
- Download Attachments with Care
- Question Legitimacy of Websites
- Case Study

#### Module Seven: Mobile Protection

- No Credit Card Numbers
- Place Lock on Phone
- Don't Save Passwords
- No Personalized Contacts Listed
- Case Study

#### Module Eight: Social Network Security

- Don't Reveal Location
- Keep Birthdate Hidden
- Have Private Profile
- Don't Link Accounts
- Case Study

#### Module Nine: Prevention Software

- Firewalls
- Virtual Private Networks
- Anti-Virus & Anti-Spyware
- Routine Updates
- Case Study

#### Module Ten: Critical Cyber Threats

- Critical Cyber Threats
- Cyber terrorism
- Cyberwarfare
- Cyberespionage
- Case Study

#### Module Eleven: Defense Against Hackers

- Cryptography
- Digital Forensics
- Intrusion Detection
- Legal Recourse
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



# DELIVERING CONSTRUCTIVE CRITICISM

## NOT GLAMOROUS, BUT ESSENTIAL!

Delivering Constructive Criticism is one of the most challenging things for anyone. Through this workshop you will gain valuable knowledge and skills that will assist you with this challenging task. When an employee commits an action that requires feedback or criticism it needs to be handled in a very specific way.

Constructive Criticism if done correctly will provide great benefits to your organization. It provides the ability for management to nullify problematic behaviors and develop well rounded and productive employees. Constructive feedback shows an employee that management cares about them and will invest time and effort into their careers.

### Delivering Constructive Criticism - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: When Should Feedback Occur?

- Repeated Events or Behavior
- Breach's in Company Policy
- When Informal Feedback has not Worked
- Immediately After the Occurrence
- Case Study

#### Module Three: Preparing and Planning

- Gather Facts on the Issue
- Practice Your Tone
- Create an Action Plan
- Keep Written Records
- Case Study

#### Module Four: Choosing a Time and Place

- Check the Ego at the Door
- Criticize in Private, Praise in Public
- It Has to be Face to Face
- Create a Safe Atmosphere
- Case Study

#### Module Five: During the Session (I)

- The Feedback Sandwich
- Monitor Body Language
- Check for Understanding
- Practice Active Listening
- Case Study

#### Module Six: During the Session (II)

- Set Goals
- Be Collaborative
- Ask for a Self-Assessment
- Keep Emotions in Check
- Case Study

#### Module Seven: Setting Goals

- SMART Goals
- The Three P's
- Ask for Their Input
- Be as Specific as Possible
- Case Study

#### Module Eight: Organizing Your Binder

- Choose the Correct Words
- Stay on Topic
- Empathize
- Try to Avoid "You Messages"
- Case Study

#### Module Nine: What Not to Do

- Attacking or Blaming
- Not Giving Them a Chance to Speak
- Talking Down
- Becoming Emotional
- Case Study

#### Module Ten: After the Session (I)

- Set a Follow-up Meeting
- Make your Self Available
- Be Very Specific with the Instructions
- Provide Support and Resources
- Case Study

#### Module Eleven: After the Session (II)

- Focus on the Future
- Measuring Results
- Was the Action Plan Followed?
- If Improvement is not Seen, Then What?
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# DEVELOPING CORPORATE BEHAVIOR

## SETTING THE STANDARDS FOR ACCELERATED GROWTH & SUCCESS

With this workshop you will be able to develop a business environment that reflects a positive set of values and ethics. Aligning these characteristics with corporate standards is what will make you stand out and become leaders throughout your company.

Through our Developing Corporate Behavior workshop you should see improved team building, better communication, and trust. By realizing the benefits of corporate behavior and developing a successful plan you should see a reduction in incidents and an increase in team work and loyalty.

### Developing Corporate Behavior - Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: The Science of Behavior

- What is Behavior?
- Psychology
- Sociology
- Anthropology
- Case Study

#### Module Three: Benefits of Corporate Behavior

- Employee Safety
- Conservation of Materials
- Engagement
- Improved Employee Performance
- Case Study

#### Module Four: Most Common Categories of Corporate Behavior

- Managerial Structure
- Company Values and Ethics
- Employee Accountability
- Workplace Incidents
- Case Study

#### Module Five: Managerial Structure

- Clearly Defined Management
- Qualified Management Team
- Obvious Advancement Path
- Grievance Procedures
- Case Study

#### Module Six: Company Values and Ethics

- Environmental
- Charity and Community Outreach
- Integrity
- Diversity
- Case Study

#### Module Seven: Employee Accountability

- Attitude
- Attendance
- Honesty
- Substance Abuse & Workplace Violence
- Case Study

#### Module Eight: Workplace Incidents

- Safety
- Prejudice & Discrimination
- Vandalism & Theft
- Harassment or Bullying
- Case Study

#### Module Nine: Designing and Implementing

- Group Planning
- Define Preferred Organizational Behaviors
- Hiring
- Training Employees
- Case Study

#### Module Ten: Corporate Team Behavior

- Team Building
- Better Communication
- Conflict Resolution
- Loyalty to the Company and the Department
- Case Study

#### Module Eleven: Auditing Corporate Behavior

- Affirm Ethical Behavior
- Investigate and Review Reported Incidents
- Determine Progress
- Get Employee Feedback & Revise
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# HANDLING DIFFICULT CUSTOMERS

## TURN DIFFICULT CUSTOMERS INTO LIFETIME CUSTOMERS

Wouldn't the world be a great place if every customer was a pleasure to deal with? We all know that is a fantasy land. So what is the best way to handle a difficult customer? Through our workshop you will learn stress management skills, how to build rapport, and recognizing certain body language.

By utilizing this Handling a Difficult Customer workshop you will see an increase in customer service, productivity, and a decrease in unhappy customers. You will be provided a strong skill set including in-person and over the phone techniques, addressing complaints, and generating return business.

### Handling a Difficult Customer - Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: The Right Attitude Starts with You

- Be Grateful
- Keep Your Body Healthy
- Focus on Positive Thoughts
- Invoke Inner Peace
- Case Study

#### Module Three: Internal Stress Management

- Irritability
- Unhappiness with Your Job
- Feeling Underappreciated
- Not Well-Rested
- Case Study

#### Module Four: External Stress Management

- Office Furniture Not Ergonomically Sound
- High Noise Volume in the Office
- Rift with Co-Workers
- Demanding Supervisor
- Case Study

#### Module Five: Transactional Analysis

- What is Transactional Analysis?
- Parent
- Adult
- Child
- Case Study

#### Module Six: Why are Some Customers Difficult?

- They Have Truly Had a Bad Experience and Want to Vent
- They Have Truly Had a Bad Experience and Want Someone to be Held Accountable
- They Have Truly Had a Bad Experience and Want Resolution
- They Are Generally Unhappy
- Case Study

#### Module Seven: Dealing with the Customer Over the Phone

- Listen to the Customer's Complaint
- Build Rapport
- Do Not Respond with Negative Words or Emotion
- Offer a Verbal Solution to Customer
- Case Study

#### Module Eight: Dealing with the Customer In Person

- Listen to the Customer's Complaint
- Build Rapport
- Responding with Positive Words and Body Language
- Besides Words, What to Look For?
- Case Study

#### Module Nine: Sensitivity in Dealing with Customers

- Who are Angry
- Who Are Rude
- With Different Cultural Values
- Who Cannot Be Satisfied
- Case Study

#### Module Ten: Scenarios of Dealing with a Difficult Customer

- Angry Customer
- Rude Customer
- Culturally Diverse Customer
- Impossible to Please Customer
- Case Study

#### Module Eleven: Following up With a Customer Once You Have Addressed Their Complaint

- Addressed Their Complaint
- Call the Customer
- Send the Customer an Email
- Mail the Customer a Small Token
- Handwritten or Typed Letter
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review Of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# NETWORKING OUTSIDE THE COMPANY

## TURN DIFFICULT CUSTOMERS INTO LIFETIME CUSTOMERS

Networking – according to Merriam Webster is “the exchange of information or services among individuals, groups, or institutions; specifically: the cultivation of productive relationships for employment or business”. These and other events can become more easily managed with this great workshop.

With our Networking (Outside the Company) workshop, you will begin to see how important it is to develop a core set of networking skills. By managing and looking at the way people interact and seeing things in a new light, you will improve on almost every aspect of your networking strategy.

### Networking Outside the Company - Outline

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: The Benefits of Networking Outside of Work**

- Create a Solid Network
- Meet Strategic Alliance Partners
- Generate Leads
- Position Yourself
- Case Study

**Module Three: Networking Obstacles**

- Time Constraints
- Saying the Wrong Thing
- Where to go to Network
- Fear of Rejection
- Case Study

**Module Four: Networking Principles**

- Develop Contacts
- Organize Your Contacts
- Follow-Up
- Maintain Relationships
- Case Study

**Module Five: Why Network?**

- Gain Trust
- Be visible
- Be an insider
- Gain Advantage
- Case Study

**Module Six: How to Build Networks**

- Physical Networking Groups
- Attend Networking Events
- Social Networking Sites
- Create Networking Referral List
- Case Study

**Module Seven: Online Networking Tools**

- Social Networks
- Blogs
- Chat Rooms
- Email
- Case Study

**Module Eight: Develop Interpersonal Relationships**

- Be Specific
- Keep your Word
- Maintain Boundaries
- Invest Time
- Case Study

**Module Nine: Common Networking Mistakes**

- Taking Before Giving
- Assumptions
- Reaching too High
- Assuming Tools Create Connections
- Case Study

**Module Ten: Time Management**

- Prioritize Contacts
- Create Group Activities
- Connect Online
- Schedule Your Network Activities
- Case Study

**Module Eleven: Manage Personal and Professional Network**

- Be Responsive
- Give Back
- Separate Personal and Business Activities
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review Of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# NETWORKING WITHIN THE COMPANY

## USING NETWORKING TO INCREASE PRODUCTIVITY AND PERFORMANCE

Networking is one of the most basic and essential skills employees should develop. Having great networking skills within an organization is sometimes overlooked. Having a viable networking and communication skill set will benefit any organization and will lead to increased productivity and performance.

Networking Within the Company is about creating and maintaining better relationships. This workshop will help you develop skills to avoid obstacles, increase communication, and build relationships that last over time. Employees who understand and embrace the aspects of networking in the workplace will grow your business and create a more engaging environment.

### Networking Within the Company - Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: The Benefits of Networking at Work

- Gain Connections
- Share Knowledge
- Increase Opportunity
- Improve Image
- Case Study

#### Module Three: Networking Obstacles

- Confusion about the Definition of Networking
- Personality Traits
- Cultural Barriers
- Personal Pride
- Case Study

#### Module Four: Networking Principles

- Relationships
- Listen
- Offer Value
- Build Trust
- Case Study

#### Module Five: How to Build Networks

- Meet New People
- Be Polite
- Follow up
- Allow Relationships to Develop Naturally
- Case Study

#### Module Six: Recognize Networking Opportunities

- Formal Networking
- Informal Networking
- Workday Opportunities
- Always Be Ready to Network
- Case Study

#### Module Seven: Common Networking Mistakes

- Not Meeting New People
- Not Following Through
- High Expectations
- Being Unprofessional
- Case Study

#### Module Eight: Develop Interpersonal Relationships

- Be Genuine
- Dialogue
- Maintain Boundaries
- Invest Time
- Case Study

#### Module Nine: Online Networking Tools

- Social Networks (LinkedIn, Twitter, Facebook)
- Blogs
- Chat Rooms
- Email
- Case Study

#### Module Ten: Time Management

- Prioritize Contacts
- Create Group Activities
- Connect Online
- Schedule Your Network Activities
- Case Study

#### Module Eleven: Maintaining Relationships Over Time

- Contact Networks Regularly
- Be Honest
- Give Personal Attention
- Limit Networks to a Manageable Size
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review Of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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**Risk Assessment & Management - Outline**

# RISK ASSESSMENT & MANAGEMENT

## USE NETWORKING TO INCREASE PRODUCTIVITY AND PERFORMANCE

It is not possible to control or manage 100% of risk, but knowing what to do before, during, and after an event will mitigate the damage and harm. Identifying potential hazards and risks and making it part of the day to day business is important. Safety should be the first priority as every business must face the reality of risks and hazards.

Through this Risk Assessment and Management course you will be aware of hazards and risk you didn't realize were around you. Identifying hazards through proper procedures will provide you the ability to prevent that accident before it occurs. Limiting and removing potential dangers through Risk Assessment will be an incredible investment and of great value.

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Action Plans and Evaluations

**Module Two: Identifying Hazards and Risks**

- What is a Hazard?
- What is a Risk?
- Consult with Employees
- Likelihood Scale
- Case Study

**Module Three: Seeking Out Problems Before they Happen (I)**

- Unique to Your Business
- Walk Around
- Long Term and Short Term
- Common Issues
- Case Study

**Module Four: Seeking Out Problems Before they Happen (II)**

- Ask 'What would happen if....?'
- External Events
- Worst Case Scenarios
- Consequence Scale
- Case Study

**Module Five: Everyone's Responsibility**

- See it, Report it!
- If It Is Not Safe Don't Do It
- Take Appropriate Precautions
- Communicating to the Organization
- Case Study

**Module Six: Tracking and Updating Control Measures**

- What is a Control Measure?
- Your Business Procedures
- Are They Adequate?
- Updating and Maintaining
- Case Study

**Module Seven: Risk Management Techniques**

- Reduce the Risk
- Transfer the Risk
- Avoid the Risk
- Accept The Risk
- Case Study

**Module Eight: General Office Safety and Reporting**

- Accident Reports
- Accident Response Plan
- Emergency Action Plan
- Training and Education
- Case Study

**Module Nine: Business Impact Analysis**

- Gather Information
- Identify Vulnerabilities
- Analyze Information
- Implement Recommendations
- Case Study

**Module Ten: Disaster Recovery Plan**

- Make It Before You Need It
- Test, Update, and Repeat
- Hot, Warm, and Cold Sites
- Keep Documentation Simple and Clear
- Case Study

**Module Eleven: Summary Of Risk Assessment**

- What are the Hazards?
- Who Might be Harmed?
- Are Current Control Measures Sufficient?
- If Not, Change Control Measures
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review Of The Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# SAFETY IN THE WORKSPACE

## IDENTIFY HAZARDS, KEEP EVERYONE SAFE

Workplace safety is the responsibility of everyone in an organization. Companies have legal obligations to meet certain safety requirements, but many go further than the minimum obligations. Safety standards and procedures must be put in place, and everyone needs to follow the standards in order for them to be effective.

This Safety In The Workplace course will be instrumental in reviewing common hazards, safety techniques and after completion; you will have the tools to help create a Safety policy for your work place. By identifying and anticipating hazards, employers can prevent injuries and keep employees safe.

### Safety In The Workplace - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: An Overview

- Work Safety and Health Legislations
- Roles & Duties
- Safety Planning

#### Module Three: Types of Hazards

- Computer Workstations
- Ergonomics
- Fire Prevention
- Fitness & Wellness
- Heat Stress
- Stress
- Violence

#### Module Four: Managers Role

- Promoting & Enforcing Safety Standards
- Element of a Health and Safety Program
- Responsibilities
- Corporate Culture

#### Module Five: Training

- Reasons for Training
- Definition
- Orientation
- On the Job Training
- Safety Meetings
- Planning and Conducting a Training Session

#### Module Six: Stress Management

- Altering
- Avoiding
- Accepting
- Relaxation Techniques
- Using Routines to Reduce Stress

#### Module Seven: Workplace Violence

- What is Workplace Violence?
- Identifying
- Addressing
- Implementing a Workplace Harassment Policy

#### Module Eight: Identifying Your Company Hazards

- Conducting an Inspection
- Prioritizing Deficiencies
- Report & Following Up

#### Module Nine: Drug & Alcohol Abuse

- For Employees
- For Managers or Supervisors
- When to Address
- Implementing a "Zero Tolerance" Rule

#### Module Ten: Writing the Safety Plan

- Management Involvement
- Responsibility
- Employee Involvement
- Follow Through with Accident Investigations
- Training of Employees

#### Module Eleven: Implement the Plan

- Selecting an Employee Representative
- Identifying Roles
- Assigning Responsibility
- Follow Through

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# TEAMWORK & TEAM BUILDING

## STRONG TEAM, INCREASED PERFORMANCE, ACCELERATED RESULTS

For most of us, teamwork is a part of everyday life. Whether it's at home, in the community, or at work, we are often expected to be a functional part of a performing team. Having a strong team will benefit any organization and will lead to more successes than not.

The Teamwork And Team Building workshop will encourage participants to explore the different aspects of a team, as well as ways that they can become a top-notch team performer. Your participants will be given the details and concepts of what makes up a team, and what factors into being a successful team and team member.

### Teamwork & Team Building - Outline

**Module One:** Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two:** Defining Success

- What is a Team?
- An Overview of a powerful Four-Phase Model

**Module Three:** Types of Teams

- The Traditional Team
- Self-Directed Teams
- E-Teams

**Module Four:** First Stage of Team Development

- Forming
- Hallmarks of This Stage
- What To Do As A Leader
- What To Do As A Follower

**Module Five:** Second Stage of Team Development

- Storming
- The Hallmarks of This Stage
- What To Do As A Leader
- What To Do As A Follower

**Module Six:** Third Stage of Team Development

- Norming
- The Hallmarks of This Stage
- What To Do As A Leader
- What To Do As A Follower

**Module Seven:** Fourth Stage of Team Development

- Performing
- Hallmarks of this Stage
- What To Do As A Leader
- What To Do As A Follower

**Module Eight:** Team Building Activities

- The Benefits and Disadvantages
- Team-Building Activities That Won't Make People Cringe
- Choosing a Location for Team-Building

**Module Nine:** Making the Most of Team Meetings

- Setting the Time and the Place
- Trying the 50-Minute Meeting
- Using Celebrations of All Sizes

**Module Ten:** Share Office Procedure Guide

- Solving Problems as a Team

**Module Eleven:** Encouraging Teamwork

- Some Things to Do
- Some Things to Avoid
- Some Things to Consider

**Module Twelve:** Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



# **SUPERVISORS & MANAGERS**

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# BUDGETS & FINANCIAL REPORTS

## A SOLID FOUNDATION IN KEY FINANCIAL ELEMENTS

Money matters can be intimidating for even the smartest people. However, having a solid understanding of basic financial terms and methods is crucial to one's career. When terms like ROI, EBIT, GAAP, and extrapolation join the conversation, you'll want to know what people are talking about, and you'll want to be able to participate in the discussion.

This Budgets And Financial Reports workshop will give you a solid foundation in finance. We'll cover topics like commonly used terms, financial statements, budgets, forecasting, purchasing decisions, and financial legislation.

### Budgets & Financial Reports - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Glossary

- What Is Finance
- Commonly Used Terms
- Key Players (People, Jobs)
- Important Finance Organizations
- Understanding GAAP

#### Module Three: Understanding Financial Statements

- Balance Sheets
- Income Statements (AKA Profit And Loss Statements)
- Statement Of Retained Earnings
- Statement Of Cash Flows
- Annual Reports

#### Module Four: Analyzing Financial Statements, Part 1

- Income Ratios
- Profitability Ratios
- Liquidity Ratios
- Working Capital Ratios
- Bankruptcy Ratios

#### Module Five: Analyzing Financial Statements, Part 2

- Long Term Analysis Ratios
- Coverage Ratios
- Leverage Ratios
- Calculating Return On Investment (ROI)

#### Module Six: Understanding Budgets

- Common Types Of Budgets
- What Information Do I Need?
- Who Should Be Involved?
- What Should A Budget Look Like?

#### Module Seven: Budgeting Made Easy

- Factoring In Historical Data
- Gathering Related Information
- Adjusting For Special Circumstances
- Putting It All Together
- Computer Based Methods

#### Module Eight: Advanced Forecasting Techniques

- Using The Average
- Regression Analysis
- Extrapolation
- Formal Financial Models

#### Module Nine: Managing The Budget

- How To Tell If You're On The Right Track
- Should Your Budget Be Updated
- Keeping A Diary Of Lessons Learned
- When To Panic

#### Module Ten: Making Smart Purchasing Decisions

- 10 Questions You Must Ask
- Determining The Payback Period
- Deciding Whether To Lease Or Buy
- Thinking Outside The Box

#### Module Eleven: A Glimpse Into The Legal World

- A Brief History
- The Sarbanes Oxley Act
- CEO/CFO Certification
- Thinking Outside The Box

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# COACHING & MENTORING

## FOSTERING GREAT WORK RELATIONSHIPS LEADS TO BETTER PERFORMANCE & RESULTS

You are in your office looking over performance reports and it happened again. Your low performing employees failed to meet quota this month even after you spoke with them about the importance of meeting goals. These employees have a great attitude and you know they can do better. You just do not know how to motivate them to reach the goal. Money used to work, but that has worn off. You are baffled and you know being frustrated makes matters worse. What do you do?

The Coaching And Mentoring focuses on how to better coach your employees to higher performance. Coaching is a process of relationship building and setting goals. How well you coach is related directly to how well you are able to foster a great working relationship with your employees and team members through understanding them and strategic goal setting.

### Coaching & Mentoring - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Defining Coaching and Mentoring

- What is Coaching?
- What is Mentoring?
- Introducing the GROW Model

#### Module Three: Setting Goals

- Goals in the context of GROW
- Identifying Appropriate Goal Areas
- Setting SMART Goals

#### Module Four: Understanding the Reality

- Getting a Picture of Where You Are
- Identifying Obstacles
- Exploring the Past

#### Module Five: Developing Options

- Identifying Paths
- Choosing Your Final Approach
- Structuring a Plan

#### Module Six: Wrapping it All Up

- Creating the Final Plan
- Identifying the First Step
- Getting Motivated

#### Module Seven: The Importance of Trust

- What is Trust?
- Trust and Coaching
- Building Trust

#### Module Eight: Providing Feedback

- The Feedback Sandwich
- Providing Constructive Criticism
- Encouraging Growth and Development

#### Module Nine: Overcoming Roadblocks

- Common Obstacles
- Re-Evaluating Goals
- Focusing on Progress

#### Module Ten: Reaching the End

- How to Know When You've Achieved Success
- Transitioning the Coachee
- Wrapping it All Up

#### Module Eleven: How Mentoring Differs from Coaching

- The Basic Differences
- Blending the Two Models
- Adapting the GROW Model for Mentoring
- Focusing on the Relationship

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# ANNUAL EMPLOYEE REVIEWS

## BETTER FEEDBACK MANAGEMENT LEADS TO BETTER PERFORMANCE

An annual review can help you keep your employees happy, engaged, and focused. It is human nature to want to succeed. Giving your employees feedback on their positive and negative attributes is part of the pathway to success. A poorly designed annual review can have the reverse effect.

With our Conducting Annual Employee Reviews workshop, you will discover how to conduct a well-designed employee annual review. By determining the categories for an annual review and understanding how it affects employee compensation, an overall increase in performance should be seen throughout your organization.

### Conducting Annual Employee Reviews - Outline

**Module One: Getting Started**

- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: How to Conduct Annual Reviews**

- Develop the Process
- Set Benchmarks Early
- Agreement with Set Benchmarks
- Hold an Effective Meeting
- Case Study

**Module Three: Categories for Annual Review (I)**

- Company Mission and Values
- Customer Service and Quality Control
- Problem Solving/Judgment
- Production
- Case Study

**Module Four: Categories for Annual Review (II)**

- Work Style
- Resource Management
- Communications Skills
- Teamwork
- Case Study

**Module Five: Common Mistakes (I)**

- Contrast Effect
- Similar-to-me Effect
- Halo (or horn) Effect
- Central Tendency
- Case Study

**Module Six: I Common Mistakes (II)**

- Leniency/Desire to Please
- First-impression Bias
- Rater Bias
- Recency Effect
- Case Study

**Module Seven: Successful Tips for Concept of Pay for Performance**

- No Surprises
- Focus on the Basics
- Show Clear Disparity
- One For All and All for One
- Case Study

**Module Eight: How to Tie Employee Compensation to Firm-Wide Returns**

- Set Quarterly Revenue Target
- Set Employee Goals
- Conduct Quarterly Reviews
- Pay Out Quarterly
- Case Study

**Module Nine: How to Communicate Employee Expectations Effectively**

- Have Regular Conversations
- State What's Working
- Be Honest
- Provide Mentoring
- Case Study

**Module Ten: Meaningful Questions to Gauge Employee Happiness (I)**

- Ask Questions Frequently
- How Transparent is Management?
- Rate Quality of Facility?
- Contributing Factors to Work Easier?
- Case Study

**Module 11: Meaningful Questions to Gauge Employee Happiness (II)**

- What Makes you Productive?
- Recognition?
- Opportunities to Grow and Advance?
- Confidence in Leadership?
- Case Study

**Module 12: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

**YOU  
WILL  
LEARN**

# DEVELOPING NEW MANAGERS

## PROSPER WITH A SOLID DEVELOPMENT STRUCTURE

With this workshop you will be provided the skills you need to successfully develop new managers. By identifying prospective managers early and identifying a clear management track, your company will prosper and thrive with a solid development structure. Becoming a new manager can seem like a daunting and challenging task. To overcome these hurdles create an environment where employees know what is expected of them.

With our Developing New Managers course you will gain the support, best practices, and knowledge. This workshop will help you develop well rounded, fair and confident managers. By identifying early you will be able to groom prospective candidates and provide the best chance for success.

### Developing New Managers - Outline

**Module One: Getting Started**

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

**Module Two: Managers are Made, Not Born**

- Managers Must be Developed
- Management Skills can be Learned
- Managers Learn by Being Managed Well
- Create a Management Track
- Case Study

**Module Three: Create a Management Track**

- Clearly Define Roles and Competencies
- Provide Tools
- Identify Candidates Early
- Clearly Define Management Track
- Case Study

**Module Four: Define and Build Competencies**

- Clearly Define Competencies Needed
- Identify Strengths
- Identify Development Areas
- Provide Development Opportunities
- Case Study

**Module Five: Managers Learn by Being Managed Well**

- Pair New Managers with Mentors
- Reward Effective Managers
- Emulate Effective Managers
- Create/Document Best Practices
- Case Study

**Module Six: Provide Tools**

- Provide Manuals or Policy Documents
- Empower New Managers
- Provide Support
- Provide Training and Development Opportunities
- Case Study

**Module Seven: Provide Support**

- Encourage Peer Networking
- Establish Resource People
- Encourage Mentor Relationships
- Establish Regular Check-ins
- Case Study

**Module Eight: Identify Strong Candidates Early**

- Development Begins Early
- Identify Candidates Early
- Identify Candidates Through Evaluations
- Develop Those with Management Goals
- Case Study

**Module Nine: Clearly Define the Management Track**

- Make the Path to Management Clear
- Serves as a Guidepost
- Ensures Quality Training/Support
- Succession Planning and Change Management
- Case Study

**Module Ten: Empower New Managers**

- Decision Making
- Asking for Help
- Support, Don't Micromanage
- Continuous Growth and Development
- Case Study

**Module Eleven: Provide Growth Opportunities**

- Provide Continuous Growth Opportunities
- Create a Development Plan
- Provide Regular Feedback
- Encourage Mentoring
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# EMPLOYEE MOTIVATION

## HELP GENERATE TRUE MOTIVATION THAT COMES FROM WITHIN

When you think of staff motivation, many things may come to mind: more money, a bigger office, a promotion, or a better quality of life. The truth is, no matter what we offer people, true motivation must come from within. Regardless of how it is characterized, it is important to get the right balance in order to ensure that you have a motivated workforce.

The Employee Motivation workshop will give participants several types of tools to become a great motivator, including goal setting and influencing skills. Participants will also learn about five of the most popular motivational models, and how to bring them together to create a custom program.

### Employee Motivation - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: A Psychological Approach

- Herzberg's Theory Of Motivation
- Maslow's Hierarchy of Needs
- The Two Models and Motivation

#### Module Three: Object-Oriented Theory

- The Carrot
- The Whip
- The Plant

#### Module Four: Using Reinforcement Theory

- A History of Reinforcement Theory
- Behavior Modification in Four Steps
- Appropriate Uses in the Workplace

#### Module Five: Using Expectancy Theory

- A History of Expectancy Theory
- Understanding the Three Factors
- Using the Three Factors to Motivate in the Workplace

#### Module Six: Personality's Role in Motivation

- Identifying Your Personality Type
- Identifying Others' Personality Type
- Motivators by Personality Type

#### Module Seven: Setting Goals

- Goals and Motivation
- Setting SMART Goal
- Evaluating and Adapting

#### Module Eight: A Personal Toolbox

- Building Your Own Motivational Plan
- Encouraging Growth and Development
- Getting Others to See the Glass Half-Full

#### Module Nine: Motivation On the Job

- The Key Factors
- Creating a Motivational Organization
- Creating a Motivational Job

#### Module Ten: Addressing Specific Morale Issues

- Dealing with Individual Morale Problems
- Addressing Team Morale
- What To Do When the Whole Company is De-Motivated

#### Module Eleven: Keeping Yourself Motivated

- Identifying Personal Motivators
- Maximizing Your Motivators
- Evaluating and Adapting

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# FACILITATION SKILLS

## LEARN TO COMMAND A ROOM & DICTATE THE PACE OF A MEETING

Facilitation is often referred to as the new cornerstone of management philosophy, with its focus on fairness and creating an easy decision making process. Creating a comfortable environment through better facilitation will give you a better understanding of what a good facilitator can do to improve any meeting or gathering.

The Facilitation Skills workshop can help any organization make better decisions. This workshop will give you an understanding of what facilitation is all about, as well as some tools that they can use to facilitate small meetings. A strong understanding of how a facilitator can command a room and dictate the pace of a meeting will have you on the road to becoming great facilitators themselves.

### Facilitation Skills - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Facilitation

- What is Facilitation?
- What is a Facilitator?
- When is Facilitation Appropriate?

#### Module Three: Process vs Content

- About Process
- About Content
- A Facilitator's Focus

#### Module Four: Laying the Groundwork

- Choosing a Facilitated Approach
- Planning for a Facilitated Meeting
- Collecting Data

#### Module Five: Powerful Model of Team Development

- Stage One: Forming
- Stage Two: Storming
- Stage Three: Norming
- Stage Four: Performing

#### Module Six: Building Consensus

- Encouraging Participation
- Gathering Information
- Presenting Information
- Synthesizing and Summarizing

#### Module Seven: Reaching a Decision Point

- Identifying the Options
- Creating a Short List
- Choosing a Solution
- Using the Multi-Option Technique

#### Module Eight: Dealing with Difficult People

- Addressing Disruptions
- Common Types of Difficult People and How to Handle Them
- Helping the Group Resolve Issues on Their Own

#### Module Nine: Addressing Group Dysfunction

- Using Ground Rules to Prevent Dysfunction
- Restating and Reframing Issues
- Getting People Back on Track

#### Module Ten: About Intervention

- Why Intervention May Be Necessary
- When to Intervene
- Levels of Intervention

#### Module Eleven: Intervention Techniques

- Using Your Processes
- Boomerang it Back
- ICE It: Identity, Check for agreement, Evaluate how to Resolve

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# KNOWLEDGE MANAGEMENT

## HOW TO HARVEST, STORE AND DISPENSE KNOWLEDGE AT WILL

The Encarta Dictionary defines knowledge management as the organization of intellectual resources and information systems within a business environment. Sounds pretty simple, right? Take a moment, though, and think about all the information that each person has in their brain. That's a lot of knowledge!

The Knowledge Management workshop will give participants the tools that they will need to begin implementing knowledge management in your organization, no matter what the size of the company or the budget. Wherever there are humans working together for one goal, there is knowledge to be harvested, stored, and dispensed as needed.

### Knowledge Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Knowledge Management

- What is Knowledge
- What is Knowledge Management
- A Brief History
- Applications in the Workplace

#### Module Three: Dos and Don'ts

- Data, Information, and Knowledge
- The Tacit Mode

#### Module Four: The Knowledge Management Life Cycle

- Understanding Episodes
- Acquisition
- Knowledge
- Integration

#### Module Five: The New Knowledge Management Paradigm

- Paradigms of the Past
- The New Paradigm
- Implications and Applications
- The Knowledge Management Endgame

#### Module Six: Knowledge Management Models

- The Nonaka and Takeuchi Model (SECI)
- Wiig Model
- Kakabadse Model
- Boisot Model

#### Module Seven: Building a Knowledge Management Rationale

- Why Rationale is Necessary
- Building a Business Case
- Finding Success Stories
- The Commodization & Customization Model

#### Module Eight: Customizing Knowledge Management Definitions

- Components of a Knowledge Management Definition
- Customizing the Components
- Creating a KMBOK

#### Module Nine: Implementing Knowledge Management in Your Organization

- Gathering Support
- Identifying Opportunities for Revenue Streams
- Key Knowledge Management Techniques
- A Map for Success
- The No-Budget Scenario

#### Module Ten: Tips for Success

- About the Chief Knowledge Officer
- Knowledge Management Skill Checklist
- The Knowledge Management Imperative
- The Hype Curve
- Barriers and Helpers to Success

#### Module Eleven: Advance Topics

- The Knowledge Management Maturity Model
- Absorptive Capacity
- Rustiness
- Process Model Types

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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# LEADERSHIP & INFLUENCE

## LEARNING HOW TO ASSERTIVELY TAKE THE LEAD IN ANY SITUATION

They say that leaders are born, not made. While it is true that some people are born leaders, some leaders are born in the midst of adversity. Often, simple people who have never had a leadership role will stand up and take the lead when a situation they care about requires it. A simple example is parenting. When a child arrives, many parents discover leadership abilities they never knew existed in order to guide and protect their offspring.

Once you learn the techniques of true Leadership And Influence, you will be able to build the confidence it takes to take the lead. The more experience you have acting as a genuine leader, the easier it will be for you. It is never easy to take the lead, as you will need to make decisions and face challenges, but it can become natural and rewarding.

### Leadership & Influence - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Evolution of Leadership

- Defining Leadership
- Characteristics of a Leader
- Leadership Principles
- A Brief History of Leadership
- Historical Leaders
- Modern Leaders
- The Great Man Theory
- The Trait Theory
- Transformational Leadership
- Summary

#### Module Three: Situational Leadership

- Situational Leadership: Telling
- Situational Leadership: Selling
- Situational Leadership: Participating
- Situational Leadership: Delegating

#### Module Four: A Personal Inventory

- An Introduction to Kouzes and Posner
- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart
- A Personal Inventory
- Creating an Action Plan
- Set Leadership Goals
- Address the Goals
- Seek Inspiration
- Choose a Role Model
- Seek Experience
- Create a Personal Mission Statement

#### Module Five: Modeling the Way

- Determining Your Way
- Being an Inspirational Role Model
- Influencing Others' Perspectives

#### Module Six: Inspiring a Shared Vision

- Choosing Your Vision
- Communicating Your Vision
- Identifying the Benefit for Others

#### Module Seven: Challenging the Process

- Developing Your Inner Innovator
- Seeing Room for Improvement
- Lobbying for Change

#### Module Eight: Enabling Others to Act

- Encouraging Growth in Others
- Creating Mutual Respect
- The Importance of Trust

#### Module Nine: Encouraging the Heart

- Sharing Rewards
- Celebrating Accomplishments
- Making Celebration Part of Your Culture

#### Module Ten: Basic Influencing Skills

- The Art of Persuasion
- The Principles of Influence
- Creating an Impact

#### Module Eleven: Setting Goals

- Setting SMART Goals
- Creating a Long-Term Plan
- Creating a Support System

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# LEAN PROCESS & SIX SIGMA

## BUSINESS PROCESSES TO DELIVER THE INTENDED RESULTS

Six Sigma is a data-driven approach for eliminating defects and waste in any business process. You can compare Six Sigma with turning your water faucet and experiencing the flow of clean, clear water. Reliable systems are in place to purify, treat, and pressure the water through the faucet. That is what Six Sigma does to business: it treats the processes in business so that they deliver their intended result.

Our Lean Process And Six Sigma workshop will provide an introduction to this way of thinking that has changed so many corporations in the world. This workshop will give participants an overview of the Six Sigma methodology, and some of the tools required to deploy Six Sigma in their own organizations.

### Lean Process & Six Sigma - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Lean

- About Six Sigma
- About Lean
- History behind Lean
- Toyota Production Systems
- The Toyota Precepts

#### Module Three: Liker's Toyota Way

- Philosophy
- Process
- People and Partners
- Problem Solving

#### Module Four: The TPS House

- The Goals of TPS
- The First Pillar: Just In Time (JIT)
- The Second Pillar: Jidoka (Error-Free Production)
- Kaizen (Continuous improvement)
- The Foundation of the House

#### Module Five: The Five Principles of Lean Business

- Value
- Value Stream
- Flow
- Pull
- Seek Perfection

#### Module Six: The First Improvement Concept (Value)

- Basic Characteristics
- Satisfiers
- Delighters
- Applying the Kano Model

#### Module Seven: The Second Improvement Concept (Waste)

- Muda
- Mura
- Muri
- The New Wastes

#### Module Eight: The Third Improvement Concept (Variation)

- Common Cause
- Special Cause
- Tampering
- Structural

#### Module Nine: The Fourth Improvement Concept (Complexity)

- What is complexity?
- What causes complexity?
- How to Simplify?

#### Module Ten: The Fifth Improvement Concept (Continuous improvement)

- The PDSA Cycle (Plan, Do, Study, Act)
- The DMAIC Method

#### Module Eleven: The Improvement Toolkit

- Gemba
- Genchi Genbutsu
- Womack's Principle
- Kaizen
- A Roadmap for implementation

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# MANAGER MANAGEMENT

## HOW TO TEACH AND LEAD NEW & EXPERIENCED MANAGERS

With this course you will be able to provide the skills, guidance, and empowerment to your team of managers. They will then be better suited in leading and motivating their team and thus produce fantastic results. To be a successful manager means having a wide range of skills. Through this workshop you will be able to disperse your knowledge and experience throughout your leadership team.

Manager Management takes a special type of leader. The workshop will expand your knowledge and provide a way for you to teach and lead new and experienced managers. As every manager knows that learning never stops, this workshop will have something for everyone.

### Manager Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Grooming a New Manager

- Set Specific Goals
- Authority (What They Can and Can't Do)
- Create a Shared Vision
- The More they Learn, the More Responsibility They Get
- Case Study

#### Module Three: Measuring Performance

- Staying Within Their Budget
- Setting Measurable Objectives
- Skip Level Feedback
- Collaborate on Criteria to be Evaluated
- Case Study

#### Module Four: Motivating Managers

- Provide the Needed Resources
- Bonuses and Incentives
- Give Credit for Good Work
- Keep Them Challenged
- Case Study

#### Module Five: Signs of Poor Management

- Missed Deadlines
- Team Turnover
- Losing Customers
- Little or No Growth
- Case Study

#### Module Six: Trust Your Team of Managers

- Do Not Micromanage
- Promote Open and Honest Communication
- Reward Initiative
- Trust, But Verify
- Case Study

#### Module Seven: When an Employee Complains about their Manager

- Keep the Information Confidential
- Gather Information from Both Sides
- Coach or Delegate the Solution
- Follow-up with the Manager or Employee
- Case Study

#### Module Eight: Coaching and Mentoring (I)

- Writing Performance Reviews
- Provide Clear and Timely Feedback
- Praise in Public, Criticize in Private
- Make Sure Your Door is Always Open
- Case Study

#### Module Nine: Coaching and Mentoring (II)

- Offer Advice, Not the Solution
- Create a Supportive Environment
- Building Ownership
- 360 Degree Feedback
- Case Study

#### Module Ten: When Do You Step In?

- Unsafe or Dangerous Events
- Legal Ramifications
- Severe Financial Costs
- Repeated Failures after Coaching Has Occurred
- Case Study

#### Module Eleven: Remember These Basic Qualities

- Express Confidence in Their Abilities
- Practice What you Preach
- Have an Open Door
- Their Success is Your Success
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# MIDDLE MANAGER

## Middle Manager - Course Outline

### ENSURING CONSISTENT & STABLE MANAGEMENT AT ALL LEVELS

Traditionally, middle managers make up the largest managerial layer in an organization. The Middle Manager is responsible to those above them and those below them. They head a variety of departments and projects. In order for a company to operate smoothly, it is essential that those in middle management be committed to the goals of the organization and understands how to effectively execute these goals.

It is crucial for businesses to focus on these essential managers and provide them with the opportunities to succeed. No matter the organization's structure or size, it will benefit from employing well-trained middle managers. Having middle managers understand their role in the organization is very important. They are in communication with a very large percentage of the company, and will have a large impact throughout the organization.

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Introduction to Management

- What is Management?
- What Do Managers Do?
- What Does It Take to Be a Manager?
- Why Does Management Matter?

#### Module Three: Ethics and Social Responsibility

- What is Ethical Workplace Behavior?
- What is Unethical Workplace Behavior?
- How to Make Ethical Decisions
- What is Social Responsibility?

#### Module Four: Managing Information

- Why Information Matters
- Strategic Importance of Information
- Characteristics and Costs of Useful Information
- Getting and Sharing Information

#### Module Five: Decision-Making

- What is Rational Decision-Making?
- Steps to Rational Decision-Making
- Limits to Rational Decision-Making
- Improving Decision-Making

#### Module Six: Control Basics of Control

- The Control Process
- Is Control Necessary or Possible?
- How and What to Control
- Control Methods

#### Module Seven: Organizational Strategy

- Basics of Organizational Strategy
- Sustainable Competitive Advantage
- Strategy-Making Process
- Corporate, Industry, Firm Level Strategies

#### Module Eight: Innovation and Change

- Organizational Innovation
- Why Innovation Matters
- Managing Innovation
- Organizational Change
- Why Change Occurs and Why it Matters
- Managing Change

#### Module Nine: Organizational Structures and Process

- Departmentalization
- Organizational Authority
- Job Design
- Designing Organizational Process

#### Module Ten: Managing Teams

- The Good and the Bad of Using Teams
- Kinds of Teams
- Work Team Characteristics
- Enhancing Work Team Effectiveness

#### Module Eleven: Motivation and Leadership

- Basics of Motivation
- Equity Theory
- Expectancy Theory
- What is Leadership?
- Situational Leadership
- Strategic Leadership

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# OFFICE POLITICS FOR MANAGERS

## CREATING & MAINTAINING BETTER RELATIONSHIPS

You have likely experienced some form of Office Politics. Working with different personalities, opinions, backgrounds, and values is a challenge in any environment. It is an inevitable fact that when people are working together personalities can and will clash. No one is an island, so working together as a team is incredibly important for the organization and every employee.

Office Politics is about creating and maintaining better relationships. It is about communicating and working with your peers and colleagues in a way that is mutually beneficial. Employees who understand the positive aspects of Office Politics are better team members and end up being more successful and productive.

### Office Politics For Managers - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: New Hires

- Company Core Values
- Building Relationships
- Encourage Respect
- Setting Ground Rules
- Case Study

#### Module Three: It's About Interacting and Influencing

- Dealing with Different Personalities
- Build a Culture of Collaboration
- Be Nice to Everyone (Not Just Those That Can Help You)
- Be a Team Player
- Case Study

#### Module Four: Dealing With Rumors, Gossip, and Half-Truths

- It's Effects on Moral
- Reinforce the Truth with Facts
- Do Not Participate
- Deal With it Swiftly
- Case Study

#### Module Five: Office Personalities (I)

- Complainer
- Gossiper
- Bully
- Negative Ned/Nancy
- Case Study

#### Module Six: Office Personalities (II)

- Information Keeper
- Know-it-All
- The Apple-Polisher
- Nosey Neighbor
- Case Study

#### Module Seven: Getting Support for Your Projects

- Gain Trust Through Honesty
- Be Assertive
- Blow Your Own Horn
- Make Allies
- Case Study

#### Module Eight: Conflict Resolution

- The Importance of Forgiveness
- Neutralizing Emotions
- The Benefits of a Resolution
- The Agreement Frame
- Case Study

#### Module Nine: Ethics

- Benefits of an Ethical Environment
- Lead by Example
- Ensuring Ethical Behavior
- Addressing Unethical Behavior
- Case Study

#### Module Ten: You Are Not an Island

- Never Burn a Bridge
- Take the High Road
- Trust is a Two Way Street
- Don't Hide in Your Office
- Case Study

#### Module Eleven: Social Events Outside of Work

- How to Decline Politely
- Rules When Attending
- Meeting New People
- Conversation Do's and Don'ts
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# PERFORMANCE MANAGEMENT

## IMPROVES PRODUCTION, BETTER PERFORMANCE & BOOSTS RESULTS

Performance Management is making sure the employee and the organization are focused on the same priorities. It touches on the organization itself by improving production and reducing waste. It helps the employee or individual set and meet their goals and improves the employee manager relationship. This is key in keeping an organization and employee aligned, which improves performance and productivity, is Performance Management.

When changes occur Performance Management helps the transition to be smoother and less hectic. It helps the organization and employee have a stream-lined relationship which improves communication and interactions between the two groups. It will help close any gaps that exist in an employee's skill-set and make them a more valuable employee through feedback and coaching.

### Performance Management - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Basics (I)

- What is Performance Management?
- How Does Performance Management Work?
- Tools
- Case Study

#### Module Three: The Basics (II)

- Three Phase Process
- Assessments
- Performance Reviews
- Case Study

#### Module Four: Goal Setting

- SMART Goal Setting
- Specific Goals
- Measurable Goals
- Attainable Goals
- Realistic Goals
- Timely Goals
- Monitoring Results
- Case Study

#### Module Five: Establishing Performance Goals

- Strategic Planning
- Job Analysis
- Setting Goals
- Motivation
- Case Study

#### Module Six: 360 Degree Feedback

- What is 360 degree Feedback?
- Versus Traditional Performance Review
- The Components
- Case Study

#### Module Seven: Competency Assessments

- Competency Assessment Defined
- Implementation
- Final Destination
- Case Study

#### Module Eight: Kolb's Learning Cycle

- Experience
- Observation
- Conceptualization
- Experimentation
- Case Study

#### Module Nine: Motivation

- Key Factors
- The Motivated Organization
- Identifying Personal Motivators
- Evaluating and Adapting
- Case Study

#### Module Ten: The Performance Journal

- Record Goals and Accomplishments
- Linking with Your Employees or Managers
- Implementing a Performance Coach
- Keeping Track
- Case Study

#### Module Eleven: Creating a Performance Plan

- Goals
- Desired Results
- Prioritization
- Measure
- Evaluation
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# SELF LEADERSHIP

## LEARN HOW TO LEAD YOURSELF SO YOU CAN BETTER LEAD OTHERS

As we grow, we learn to become leaders. Being a leader is natural for some, and learned for others. No matter how we have become a leader, it is important to remember we must lead ourselves before we lead others. Take the time to motivate yourself and realize that you can do it.

With our Self-Leadership workshop, you will discover the specifics of how to be a better leader for yourself and for others. You will be able to guide yourself in positives ways, and focus on your growing success as a leader, independently of where you are now.

### Self-Leadership - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What Is Self-Leadership?

- Sources
- Before Action
- During
- After Action
- Case Study

#### Module Three: Motivators

- Need for Autonomy
- Self-Efficacy
- External Factors
- Internal Factors
- Case Study

#### Module Four: Behavior Focus (I)

- Focusers and Reminders
- Cues
- Self-Observation
- Goal Setting
- Case Study

#### Module Five: Behavior Focus (II)

- Purpose
- Reward
- Punishment
- Practice
- Case Study

#### Module Six: Natural Rewards

- Definition
- Competence
- Purpose and Self-Control
- Life Activities
- Case Study

#### Module Seven: Constructive Thinking

- Positive Thinking
- Self-Talk
- Aware of Personal Beliefs and Assumptions
- Opportunity Thinking
- Case Study

#### Module Eight: Well-Being (I)

- Emotional Intelligence
- Stress Management
- Optimism
- Fun and Happiness
- Case Study

#### Module Nine: Well-Being (II)

- Fitness
- Diet
- Sleep
- Personal Effectiveness
- Case Study

#### Module Ten: Individuality

- Personality
- Locus of Control
- Self-Monitor
- Autonomy
- Case Study

#### Module Eleven: Personal Application

- Diversity
- Personal Problems
- Workplace Problems
- Social Responsibility
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# SERVANT LEADERSHIP

## HOW TO BE A GREAT LEADER & GET RESULTS BY FOCUSING ON OTHERS

Servant leadership can seem like a contradicting term, but it is becoming a very popular tool in many businesses. Servant leadership is a philosophy that involves focusing on others, on their success, and in turn to build better relationships that benefit both owner/manager and employee. Servant leadership shows that managers can be great leaders while boosting their employee's confidence and further their success at the same time.

With our Servant Leadership workshop participants will focus on the growth and development of their employees and ensuring their success. In doing so, the leaders succeed when their employees do. With a business team, servant leadership can not only help employees achieve and grow, but it can also benefit you as a leader and your organization as a whole.

### Servant Leadership - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is Servant Leadership?

- A Desire to Serve
- Knowing to Share the Power
- Putting Others First
- Helping Employees Grow
- Case Study

#### Module Three: Leadership Practices

- Democratic Leadership Style
- Laissez-Faire Style
- Leading by Example
- Path-Goal Theory
- Case Study

#### Module Four: Share the Power

- Being Empathetic
- Learn to Delegate
- Their Success is Your Success
- Know When to Step In
- Case Study

#### Module Five: Characteristics of a Servant Leader

- Listening Skills
- Persuasive Powers
- Recognizes Opportunities
- Relates to Employees
- Case Study

#### Module Six: Barriers to Servant Leadership

- Excessive Criticism
- Doing Everything Yourself
- Sitting on the Sidelines
- Demanding from Employees
- Case Study

#### Module Seven: Building a Team Community

- Identify the Group Needs
- Complement Member Skills
- Create Group Goals
- Encourage Communication
- Case Study

#### Module Eight: Be a Motivator

- Make it Challenging
- Provide Resources
- Ask for Employee Input
- Offer Incentives
- Case Study

#### Module Nine: Be a Mentor

- Establish Goals
- Know When to Praise or Criticize
- Create a Supportive Environment
- Create an Open Door Policy
- Case Study

#### Module Ten: Training Future Leaders

- Offer Guidance and Advice
- Identify Their Skill Sets
- Methods of Feedback
- Establish Long Term Goals
- Case Study

#### Module Eleven: Self-Reflection

- Keep a Journal
- Identify Your Strengths and Weaknesses
- Identify Your Needs
- Creating Your Own Goals
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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WILL  
LEARN

# SUPERVISING OTHERS

## LEARN TO IMPROVE YOUR SKILLS AND EASILY GET MORE FROM ALL YOUR PEOPLE

Supervising others can be a tough job. Between managing your own time and projects, helping your team members solve problems and complete tasks, and helping other supervisors, your day can fill up before you know it.

The Supervising Others workshop will help supervisors become more efficient and proficient, with information on delegating, managing time, setting goals and expectations (for themselves and others), providing feedback, resolving conflict, and administering discipline.

### Supervising Others - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Setting Expectations

- Defining the Requirements
- Identifying Opportunities for Improvement and Growth
- Setting Verbal Expectations
- Putting Expectations in Writing

#### Module Three: Setting Goals

- Understanding Cascading Goals
- The SMART Way
- Helping Others Set Goals

#### Module Four: Assigning Work

- General Principles
- The Dictatorial Approach
- The Apple-Picking Approach
- The Collaborative Approach

#### Module Five: Degrees of Delegation

- Level 1: Complete Supervision
- Level 2: Partial Supervision
- Level 3: Complete Independence

#### Module Six: Implementing Delegation

- Deciding to Delegate
- To Whom Should You Delegate?
- Providing Instructions
- Monitoring the Results
- Troubleshooting Delegation

#### Module Seven: Providing Feedback

- Characteristics of Good Feedback
- Feedback Delivery Tools
- Informal Feedback
- Formal Feedback

#### Module Eight: Managing Your Time

- The 80/20 Rule
- Prioritizing with the Urgent-Important Matrix
- Using a Productivity Journal
- Using Routines and Rituals to Simplify Your Workday

#### Module Nine: Resolving Conflict

- Using a Conflict Resolution Process
- Maintaining Fairness
- Seeking Help from Within the Team
- Seeking Help from Outside the Team

#### Module Ten: Tips for Special Situations

- What to Do If You've Been Promoted from within the Team
- What to Do If You're Leading a Brand New Team
- What to Do if You're Taking on an Established Team

#### Module Eleven: A Survival Guide for the New Supervisor

- Ask the Right Questions of the Right People
- Go to Gemba
- Keep Learning!

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# TEAM BUILDING FOR MANAGERS

## DISCOVER THE SPECIFICS & APPLY THE PRINCIPLES FOR SUCCESSFUL TEAMS

Teamwork is a part of everyday business life. Whether it's virtual, in the office, or on the road, we are often expected to be a functional part of a team. Having a strong team benefits every organization and will lead to more successes than not. Teamwork is how you will elevate that event or project from just OK to great!

Through our Team Building For Managers workshop you will be encouraged to explore the different aspects of a team, as well as ways that you can become a top-notch team performer. You will be given the details and concepts of what makes up a team, and what factors into being a successful team and team member. Activities that build camaraderie, develop problem solving skills, and stimulate interaction will give you what is needed to be a great team builder.

### Team Building For Managers - Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: What Are The Benefits Of Team Building?

- Better Communication And Conflict Resolution
- Effectiveness
- Motivation
- Camaraderie
- Case Study

#### Module Three: Types Of Team Building

- Games
- Activities
- Education
- Social Gatherings
- Case Study

#### Module Four: Creating Team Chemistry

- Games For Introductions
- Games To Build Camaraderie
- Games For Problem Solving
- Games To Stimulate Interaction
- Case Study

#### Module Five: Improving Team Strength

- Games To Build Trust
- Games To Motivate
- Games To Build Communication
- Games For Conflict Resolution
- Case Study

#### Module Six: Engagement and Collaboration Activities

- Activities To Build Camaraderie
- Activities For Idea Sharing
- Activities To Build Trust
- Activities To Stimulate Interaction
- Case Study

#### Module Seven: Building a Great Team Identity

- Activities To Motivate
- Activities To Improve Working Together
- Activities To Build Communication
- Activities For Conflict Resolution
- Case Study

#### Module Eight: Social Gathering

- Singing / Karaoke
- Dinner / Pot Lucks
- Physical Activities
- Meetings
- Case Study

#### Module Nine: Common Mistakes When Team Building

- Letting Cliques Develop
- Not Delegating Tasks
- Rewarding In Private / Criticizing In Public
- Disjointed Plans Of Grandeur
- Case Study

#### Module Ten: Formatting A Team Building Plan

- Define The Goal
- Consult Team Members
- Research And Create Structure
- Keep It Fun
- Case Study

#### Module Eleven: Evaluations and Improvements

- Was The Goal Met?
- Was The Team Building Cohesive?
- What Did The Team Think Of The Team Building?
- How Can The Team Building Be Improved For Next Time?
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# TEAM BUILDING THROUGH CHEMISTRY

## DISCOVER THE SPECIFICS & APPLY THE PRINCIPLES FOR SUCCESSFUL TEAMS

Teams are unavoidable in any business. The key to successful team building is addressing the importance of chemistry. By staying aware of the chemistry as you build the group, you will increase the chance of avoiding pitfalls and developing a sense of unity.

With our Team Building workshop, you will discover the specifics of how building a team through chemistry will lead to success. It is not enough to have a group of people just work on a project. They need to connect and utilize each others' strength through team chemistry.

### Team Building Through Chemistry - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Teams

- What Is the Definition of a Team?
- How Do People Feel about Being on Teams?
- Why Do Teams Fall Apart?
- Examples of Successful Teams
- Case Study

#### Module Three: Team Development Model

- Forming
- Norming
- Storming
- Performing
- Case Study

#### Module Four: Chemistry in Teams

- What Is Chemistry?
- Factors that Influence Chemistry
- Examples
- Roles of Leadership
- Case Study

#### Module Five: Diversity

- Advantages
- Complexity
- Conflicts
- Encourage Individuality
- Case Study

#### Module Six: Vision and Goals

- Creating Vision
- Shared Vision
- SMART Goals
- Collaboration
- Case Study

#### Module Seven: Roles

- Establishing Roles
- Taking
- Making
- Avoid Power Struggles
- Case Study

#### Module Eight: Leadership Functions

- Set the Tone
- Conflict Management
- Direct, Don't Order
- Encourage
- Case Study

#### Module Nine: Develop Cohesion

- Sense of Exclusivity
- Connect Beyond Work
- Outside Competition
- Focus on Consensus
- Case Study

#### Module Ten: Build Relationships

- Respect
- Empathy
- Open Communication
- Share Credit
- Case Study

#### Module Eleven: Direction of Team

- Charter
- Task Orientation
- Monitor Performance
- Feedback
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# VIRTUAL TEAM BUILDING & MANAGEMENT

## A PREDOMINANT ASPECT OF EVERY BUSINESS, EVERY SERVICE

There were an estimated one billion virtual workers in 2017, and the number is expected to continue climbing well into the future. With a global workforce you are provided with a cost effective and talented pool of employees to draw from. With a virtual team you are given an unlimited production environment.

A virtual team has the normal issues of a localized team, with the additional challenges of distance and cultural differences. This Virtual Team Building & Management workshop will give you the knowledge to work with these challenges and succeed in a growing global workforce.

### Virtual Team Building & Management - Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Setting Up Your Virtual Team (I)

- Choose Self-Motivated People with Initiative
- Face to Face Meeting At First
- Diversity Will Add Value
- Experienced with Technology
- Case Study

#### Module Three: Setting Up Your Virtual Team (II)

- Personality Can Count as Much as Skills
- Rules of Engagement
- Setting up Ground Rules
- Icebreakers and Introductions
- Case Study

#### Module Four: Virtual Team Meetings

- Scheduling Will Always be an Issue
- Have a Clear Objective and Agenda
- Solicit Additional Topics in Advance
- Discourage Just Being Status Reports
- Case Study

#### Module Five: Communication (I)

- Early and Often
- Rules of Responsiveness
- Face to Face When Possible
- Choose the Best Tool
- Case Study

#### Module Six: Communication (II)

- Be Honest and Clear
- Stay in Constant Contact
- Don't Make Assumptions
- Setup Email Protocols
- Case Study

#### Module Seven: Building Trust

- Trust Your Team and They Will Trust You
- Be Aware of 'Us vs. Them' Territorial Issues
- Share Best Practices
- Create a Sense of Ownership
- Case Study

#### Module Eight: Cultural Issues

- Respect and Embrace Differences
- Be Aware of Different Work Styles
- Know Your Team Members Cultural Background
- Dealing With Stereotypes
- Case Study

#### Module Nine: To Succeed With a Virtual Team

- Set Clear Goals
- Create a SOP's
- Build a Team Culture
- Provide Timely Feedback
- Case Study

#### Module Ten: Dealing With Poor Team Players

- Manage Their Results, Not Their Activities
- Be Proactive Not of Reactive
- Check in Often
- Remove Them
- Case Study

#### Module Eleven: Choosing the Right Tools

- Communication Software
- Collaboration and Sharing Tools
- Project Management Software
- Use Whatever Works for You and Your Team
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# CAREER DEVELOPMENT

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# 10 SOFT SKILLS YOU NEED

**ENRICH COMMUNICATION,  
IMPROVE CONFIDENCE,  
INCREASE BOTTOM LINE**

The meaning of Soft Skills can sometimes be difficult to describe. It can be that unique attribute or characteristic that facilitates great communication. It can be the special way that you show confidence in a challenging situation. These and other events can become more easily managed with this great workshop.

With our 10 Soft Skills You Need workshop you will begin to see how important it is to develop a core set of soft skills. By managing and looking at the way people interact and seeing things in a new light, you will improve on almost every aspect of your career.

## 10 Soft Skills You Need - Course Outline

### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

### Module Two: What are Soft Skills?

- Definition of Soft Skills
- Empathy and the Emotional Intelligence Quotient
- Professionalism
- Learned vs. Inborn Traits

### Module Three: Soft Skill 1: Communication

- Ways We Communicate
- Improving Non-Verbal Communication
- Listening
- Openness and Honesty
- Case Study

### Module Four: Skill 2: Teamwork

- Identifying Capabilities
- Get Into Your Role
- Learn the Whole Process
- The Power of Flow
- Case Study

### Module Five: Soft Skill 3: Problem Solving

- Define the Problem
- Generate Alternative Solutions
- Evaluate the Plans
- Implementation and Re-evaluation
- Case Study

### Module Six: Soft Skill 4: Time Management

- The Art of Scheduling
- Prioritizing
- Managing Distractions
- The Multitasking Myth
- Case Study

### Module Seven: Soft Skill 5 and 6: Attitude and Work Ethic

- What Are You Working For?
- Caring for Others vs. Self
- Building Trust
- Work Is Its Own Reward
- Case Study

### Module Eight: Soft Skill 7: Adaptability/Flexibility

- Getting over the Good Old Days Syndrome
- Changing to Manage Process
- Changing to Manage People
- Showing You're Worth Your Weight in Adaptability
- Case Study

### Module Nine: Soft Skill 8: Self-Confidence

- Confident Traits
- Self-Questionnaire
- Surefire Confidence Building Tactics
- Build Up Others
- Case Study

### Module Ten: Soft Skill 9: Ability to Learn From Criticism

- Wow, You Mean I'm Not Perfect?
- Listen With An Open Mind
- Analyze and Learn
- Clear the Air and Don't Hold Any Grudges
- Case Study

### Module Eleven: Soft Skill 10: Networking

- Redefining Need
- Identifying Others' Interests
- Reaching Out
- When to Back Off
- Case Study

### Module Twelve: Wrapping Up

- Words from the Wise
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- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# ASSERTIVENESS & SELF- CONFIDENCE

## LEARN TO IMPROVE YOUR SKILLS AND EASILY GET MORE FROM ALL YOUR PEOPLE

Self-confident and assertiveness are two skills that are crucial for success in life. If you don't feel worthy, and/or you don't know how to express your self-worth when communicating with others, life can be very painful. These skills will provide opportunities and benefits to your participants in their professional and personal lives.

The Assertiveness And Self-Confidence workshop will give participants an understanding of what assertiveness and self-confidence each mean (in general and to them personally) and how to develop those feelings in their day-to-day lives. These skills will encompass many aspects of your participant's lives and have a positive effect on all of them.

### Assertiveness & Self-Confidence - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What Does Self-Confidence Mean To You?

- What is Assertiveness?
- What is Self-Confidence?
- The Four Styles

#### Module Three: Obstacles to Our Goals

- Types of Negative Thinking
- Case Study
- Personal Application

#### Module Four: Communication Skills

- Listening and Hearing: They Aren't the Same Thing
- Asking Questions
- Body Language

#### Module Five: The Importance of Goal Setting

- Why Goal Setting is Important
- Setting SMART Goals
- Our Challenge to You

#### Module Six: Feeling the Part

- Identifying Your Worth
- Creating Positive Self-Talk
- Identifying and Addressing Strengths and Weaknesses

#### Module Seven: Looking the Part

- The Importance of Appearance
- The Role of Body Language
- First Impressions Count!

#### Module Eight: Sounding the Part

- It's How You Say It
- Sounding Confident
- Using 'I' Messages

#### Module Nine: Powerful Presentations

- What to Do When You're on the Spot
- Using STAR To Make Your Case

#### Module Ten: Coping Techniques

- Building Rapport
- Expressing Disagreement
- Coming to Consensus

#### Module Eleven: Dealing with Difficult Behavior

- Dealing with Difficult Situations
- Key Tactics

#### Module Twelve: Wrapping Up

- Words from the Wise
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- Lessons Learned
- Completion of Action Plans and Evaluations

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# COMMUNICATION STRATEGIES

## HOW TO MAKE THE BEST OF ANY SITUATION

For the better part of every day, we are communicating to and with others. Whether it is the speech you deliver in the boardroom, the level of attention you give your spouse when they are talking to you, or the look you give the cat, it all means something.

The Communication Strategies workshop will help you understand the different methods of communication and how to make the most of each of them. These strategies will provide a great benefit for any organization and its employees. They will trickle down throughout the organization and positively impact everyone involved.

### Communication Strategies - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Big Picture

- What is Communication?
- How Do We Communicate?
- Other Factors in Communication

#### Module Three: Understanding Communication Barriers

- An Overview of Common Barriers
- Language Barriers
- Cultural Barriers
- Differences in Time and Place

#### Module Four: Paraverbal Communication Skills

- The Power of Pitch
- The Truth about Tone
- The Strength of Speed

#### Module Five: Non-Verbal Communication

- Understanding the Mehrabian Study
- All About Body Language
- Interpreting Gestures

#### Module Six: Speaking Like a STAR

- S = Situation
- T = Task
- A = Action
- R = Result
- Summary

#### Module Seven: Listening Skills

- Seven Ways to Listen Better Today
- Understanding Active Listening
- Sending Good Signals to Others

#### Module Eight: Asking Good Questions

- Open Questions
- Closed Questions
- Probing Questions

#### Module Nine: Appreciative Inquiry

- The Purpose of AI
- The Four Stages
- Examples and Case Studies

#### Module Ten: Mastering the Art of Conversation

- Level One: Discussing General Topics
- Level Two: Sharing Ideas and Perspectives
- Level Three: Sharing Personal Experiences
- Our Top Networking Tips

#### Module Eleven: Advanced Communication Skills

- Understanding Precipitating Factors
- Establishing Common Ground
- Using 'I' Messages

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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# CREATIVE PROBLEM SOLVING

## HOW TO IDENTIFY PROBLEMS AND IMPLEMENT SOLUTIONS

In the past few decades, psychologists and business people alike have discovered that successful problem solvers tend to use the same type of process to identify and implement the solutions to their problems. This process works for any kind of problem, large or small.

The Creative Problem Solving workshop will give you an overview of the entire creative problem solving process, as well as key problem solving tools that you can use every day. Skills such as brainstorming, information gathering, analyzing data, and identifying resources will be covered throughout the workshop.

### Creative Problem Solving - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Problem Solving Method

- What is a Problem?
- What is Creative Problem Solving?
- What are the Steps in the Creative Solving Process?

#### Module Three: Information Gathering

- Understanding Types of Information
- Identifying Key Questions
- Methods of Gathering Information

#### Module Four: Problem Definition

- Defining the Problem
- Determining Where the Problem Originated
- Defining the Present State and the Desired State
- Stating and Restating the Problem
- Analyzing the Problem
- Writing the Problem Statement

#### Module Five: Preparing for Brainstorming

- Identifying Mental Blocks
- Removing Mental Blocks
- Stimulating Creativity

#### Module Six: Generating Solutions (I)

- Brainstorming Basics
- Brainwriting and Mind Mapping
- Duncker Diagrams

#### Module Seven: Generating Solutions (II)

- The Morphological Matrix
- The Six Thinking Hats
- The Blink Method

#### Module Eight: Analyzing Solutions

- Developing Criteria
- Analyzing Wants and Needs
- Using Cost/Benefit Analysis

#### Module Nine: Selecting a Solution

- Doing a Final Analysis
- Paired Comparison Analysis
- Analyzing Potential Problems

#### Module Ten: Planning Your Next Steps

- Identifying Tasks
- Identifying Resources
- Implementing, Evaluating, and Adapting

#### Module Eleven: Recording Lessons Learned

- Planning the Follow-Up Meeting
- Celebrating Successes
- Identifying Improvements

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# DEVELOPING CREATIVITY

## IMPROVE CREATIVITY, FACILITATE THE PROCESS AND REAP THE REWARDS

Children have an innate creative ability when they are born, but for some reason adults can lose it along the way. Why not move out of the mundane, be more curious, engage, and explore new ideas! Recognize creativity and be ready when it happens.

With our Developing Creativity workshop participants will learn how to remove barriers that block or limit their creativity. They will improve their imagination, divergent thinking, and mental flexibility. Participants will learn mind mapping, individual brainstorming, and when to recognize and look for what inspires them to be more creative.

### Developing Creativity - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Action Plans and Evaluations

#### Module Two: What is Creativity?

- Divergent Thinking
- Problem Solving
- Imagination and Inspiration
- Something Out of Nothing
- Case Study

#### Module Three: Getting Inspired

- Introspection
- Read More
- Removing the Mental Block
- Art Inspires Art
- Case Study

#### Module Four: Beating Procrastination

- Get Rid Of Clutter
- Self-Imposed Limitations
- Build on Small Successes
- Don't Start at the Beginning
- Case Study

#### Module Five: Improving Your Creative Mind Set (I)

- Open Mind
- Do Not Judge
- Positive Mind Set
- Ask Why?
- Case Study

#### Module Six: Improving Your Creative Mind Set (II)

- Make Associations
- Keep a Journal
- Question Assumptions
- Creative Confidence
- Case Study

#### Module Seven: Curiosity

- Spark Your Curiosity
- Curiosity is the Engine of Creativity
- Engage
- Ask Open Ended Questions
- Case Study

#### Module Eight: Take Risks

- Be Confident
- Scared to Fail?
- Fake It 'til You Make It
- Afraid To Be Judged
- Case Study

#### Module Nine: Think Like a Child

- Daydream
- Be Curious
- Play Games
- Experiment
- Case Study

#### Module Ten: Environmental Factors

- Work Area
- Additional Environments
- Get Enough Sleep
- Variables
- Case Study

#### Module Eleven: Individual Brainstorming

- Generate A Lot of Ideas
- Mind Mapping
- Visualization
- Organize and Bring the Ideas Together
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# DIGITAL CITIZENSHIP

## TRANSFORMING SOCIAL SKILLS INTO THE VIRTUAL WORLD

This Digital Citizenship course will give participants the guidance needed in the ever changing digital world. As our lives are lived more and more online we all need to translate our social skills into the virtual world.

Digital Citizenship allows us to connect, collaborate, and share by using technology appropriately. In person meetings are on the decline which makes it necessary to engage people digitally. Being a good digital citizen means you have a set of skills to work in the digital world.

### Digital Citizenship - Course Outline

#### Module One: Getting Started

- Housekeeping items
- Pre-Assignment Review
- Parking Lot
- Workshop Objectives
- Action Plans

#### Module Two: What Is Digital Citizenship?

- What is Digital
- Engaging with Others
- It's a Moving Target
- Belonging to a Community
- Case Study

#### Module Three: Being a Good Citizen

- Build it Up
- Real World Influences
- Using Technology Appropriately
- The Golden Rule
- Case Study

#### Module Four: Best Practices for Sharing

- Digital Footprints
- Personal and Work Lives
- Stop and Think Before You Post
- Do Not Overshare
- Case Study

#### Module Five: Networking and Personal Branding (I)

- Personal Branding
- Be Yourself ( online and off)
- Social Networking
- If you Share it, Expect Everyone to See It
- Case Study

#### Module Six: Networking and Personal Branding (II)

- Introduce Colleagues
- Volunteer to Help Others
- Blog
- Guard Your Reputation
- Case Study

#### Module Seven: Digital Security and Safety (I)

- Don't Trust Anyone You Don't Know
- Enable 2-Step Verifications
- Public Wi-Fi
- Public Computers
- Case Study

#### Module Eight: Digital Security and Safety (II)

- Email and Attachments
- Password Rules
- Back Up your Files
- Update Your Software
- Case Study

#### Module Nine: Dealing With The Dark Side

- See it, Report it
- Bullying and Harassment
- Trolling
- Shared Something You Shouldn't Have?
- Case Study

#### Module Ten: Digital Etiquette (I)

- Respect and Tone
- Speak Up, Not Out
- Topics To Avoid
- Keep Private Messages Private
- Case Study

#### Module Eleven: Digital Etiquette (II)

- Educate Yourself
- Information Processing
- Internet Boldness
- Permission to Share
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# ENTREPRENEURSHIP

## LEARN WHAT IS INVOLVED IN BEING AN ENTREPRENEUR AND HOW TO DO IT RIGHT

Would you like to be your own boss? Have you ever dreamed of starting your own business? Don't know what to do about your great business idea? If you have ever thought about these situations then you need this entrepreneurship workshop.

Let our Entrepreneurship workshop help you achieve your dreams. Being an entrepreneur can be full of risks. These risks are minimized through drafting a business plan, knowing your competition, and successful marketing. All these and more can be found in our Entrepreneurship workshop.

### Entrepreneurship - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: Decide On The Type Of Business

- Is It Feasible?
- What Are Your Interests?
- Do You Have The Experience?
- Are You An Expert In The Field?
- Case Study

#### Module Three: What Is The Market/Competition Like?

- Is The Venture Lucrative?
- Is There Competition?
- How Can You Set Yourself Apart From The Competition?
- How Is The Customer Prospect?
- Case Study

#### Module Four: Basics Of Starting A Business

- Decide On A Name
- Legal Structure Of Business
- Register The Business
- Choose A Location
- Hire An Accountant
- Case Study

#### Module Five: Create A Business Plan

- What Should Be Included In The Business Plan?
- Gather Documentation
- Develop Business Plan Outline
- Draft Business Plan
- Case Study

#### Module Six: Get Financing

- Contact Organizations For Guidance
- Decide The Type Of Financing
- Shop Around
- What To Do Once Approved
- Case Study

#### Module Seven: Hire Employees

- Develop Job Description(S)
- Advertise Positions
- Interview Candidates
- Select Candidates
- Case Study

#### Module Eight: Training Employees

- Teach Company Culture
- Implement Actual Training For The Position
- Provide Feedback
- Offer Additional Training, If Necessary
- Case Study

#### Module Nine: Market The Business

- Traditional Marketing
- Create A Website
- Social Media
- Networking Groups
- Case Study

#### Module Ten: Run The Business

- Procurement
- Sell! Sell! Sell!
- How To Manage Cash Flow
- Budgeting
- Case Study

#### Module Eleven: Grow The Business

- Offer More Products / Services
- Open Another Location
- Franchise Opportunities
- Scoring Large Contracts
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# INTERPERSONAL SKILLS

**LEARN ABOUT INTRODUCTIONS, SOCIALIZING, HANDLING ODD SITUATIONS,...**

We have all met that dynamic, charismatic person that just has a way with others, and has a way of being remembered. With this class you will identify ways of creating a powerful introduction, remembering names, and managing situations when you've forgotten someone's name.

The Interpersonal Skills workshop will help participants work towards being that unforgettable person by providing communication skills, negotiation techniques, tips on making an impact, and advice on networking and starting conversations. They will also identify the skills needed in starting a conversation, moving a conversation along, and progressing to higher levels of conversation.

## Interpersonal Skills - Course Outline

### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

### Module Two: Verbal Communication Skills

- Listening and Hearing: They Aren't the Same Thing
- Asking Questions
- Communicating with Power

### Module Three: Non-Verbal Communication Skills

- Body Language
- The Signals You Send to Others
- It's Not What You Say, It's How You Say It

### Module Four: Making Small Talk and Moving Beyond

- The Four Levels of Conversation

### Module Five: Moving the Conversation Along

- Asking for Examples
- Using Repetition
- Using Summary Questions
- Asking for Clarity and Completeness

### Module Six: Remembering Names

- Creating a Powerful Introduction
- Using Mnemonics
- Uh-Oh, I've Forgotten Your Name

### Module Seven: Influencing Skills

- Seeing the Other Side
- Building a Bridge
- Giving In Without Giving Up

### Module Eight: Bringing People to Your Side

- A Dash of Emotion
- Plenty of Facts
- Bringing It All Together

### Module Nine: Sharing Your Opinion

- Using I-Messages
- Disagreeing Constructively
- Building Consensus

### Module Ten: Negotiation Basics

- Preparation
- Opening
- Bargaining
- Closing

### Module Eleven: Making An Impact

- Creating a Powerful First Impression
- Assessing a Situation
- Being Zealous without Being Offensive

### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# mLEARNING ESSENTIALS

## UNDERSTANDING THE GROWING IMPORTANCE OF MOBILE LEARNING IN ANY BUSINESS

Mobile learning, or mLearning, is defined as the delivery of learning, education or training on mobile devices, such as mobile phones, tablets, laptops or PDAs. mLearning allows training and support to be taken anywhere, making it flexible and convenient for companies to use.

With this mLearning workshop, participants will begin to see the importance and usefulness of mLearning in any organization. By absorbing the ins and outs of utilizing mLearning, participants will possess the skills needed to take advantage of this new technology, in order to educate employees and clients more efficiently.

### mLearning Essentials - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is mLearning?

- mLearning Uses
- mLearning Environments
- mLearning Tools
- mLearning Advantages
- Case Study

#### Module Three: Common mLearning Devices

- Mobile Phones
- Tablets
- Notebook Computers
- Personal Digital Assistant (PDA)
- Case Study

#### Module Four: Ancillary Equipment in mLearning

- Internet Connections
- Messaging Services
- Video Cameras
- Bluetooth
- Case Study

#### Module Five: mLearning vs. eLearning

- Devices Available
- Informal vs Formal Structure
- Increased Access
- Content
- Case Study

#### Module Six: Four C's of mLearning

- Content
- Compute
- Capture
- Communicate
- Case Study

#### Module Seven: Aspects of mLearning

- The FRAME Model
- The Device Aspect
- The Learner Aspect
- The Social Aspect
- Case Study

#### Module Eight: Challenges of mLearning

- Dependence on Technology
- Decreased Quality of Communication
- Security
- Risk of Distraction
- Case Study

#### Module Nine: Benefits of mLearning

- Decreased Costs
- Available Support
- Unlimited Resources
- Continuous Learning
- Case Study

#### Module Ten: Getting mLearning Started

- Organize Your Resources
- Form a Work Plan
- Engage Employees
- Establish an End Goal
- Case Study

#### Module Eleven: Employee Training

- Training Facilities
- Encourage Communication
- Establish Guidelines
- Equipment Training
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

**YOU  
WILL  
LEARN**

# NEGOTIATION SKILLS

## LEARN THE SKILLS NEEDED FOR EFFECTIVE NEGOTIATING

Although people often think of boardrooms, suits, and million dollar deals when they hear the word negotiation, the truth is that we negotiate all the time. Through this workshop participants will be able to understand the basic types of negotiations, the phases of negotiations, and the skills needed for successful negotiating.

This Negotiation Skills workshop will give you a sense of understanding your opponent and have the confidence to not settle for less than you feel is fair. You will learn to set an atmosphere of respect that is essential, as uneven negotiations could lead to problems in the future.

### Negotiation Skills - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Negotiation

- The Three Phases
- Skills for Successful Negotiating

#### Module Three: Getting Prepared

- Establishing Your WATNA and BATNA
- Identifying Your WAP
- Identifying Your ZOPA
- Personal Preparation

#### Module Four: Laying the Groundwork

- Setting the Time and Place
- Establishing Common Ground
- Creating a Negotiation Framework
- The Negotiation Process

#### Module Five: Phase One - Exchanging Information

- Getting off on the Right Foot
- What to Share
- What to Keep to Yourself

#### Module Six: Phase Two - Bargaining

- What to Expect
- Techniques to Try
- How to Break an Impasse

#### Module Seven: About Mutual Gain

- Three Ways to See Your Options
- About Mutual Gain
- What Do I Want?
- What Do They Want?
- What Do We Want?

#### Module Eight: Phase Three - Closing

- Reaching Consensus
- Building an Agreement
- Setting the Terms of the Agreement

#### Module Nine: Dealing with Difficult Issues

- Being Prepared for Environmental Tactics
- Dealing with Personal Attacks
- Controlling Your Emotions
- Deciding When It's Time to Walk Away

#### Module Ten: Negotiating Outside the Boardroom

- Adapting the Process for Smaller Negotiations
- Negotiating via Telephone
- Negotiating via Email

#### Module Eleven: Negotiating on Behalf of Someone Else

- Choosing the Negotiating Team
- Covering All the Bases
- Dealing with Tough Questions

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# PERSONAL BRANDING

## HOW TO DEFINE YOURSELF, CONTROL YOUR IMAGE, SHARPEN YOUR BRAND

Personal Branding is identifying your assets, characteristics, strengths, and skills as an individual. Understanding Personal Branding will provide advantages in your personal and professional lives. Branding is a mix of how you present yourself and how others see you. It is important to be aware of how you are viewed.

With our Personal Branding course you will be able to share your vision and passions with others in your company. Utilize this knowledge through Social Media to define and influence how others see you. You are your brand so protect it. Live it.

### Personal Branding - Course Outline

#### Module One: Getting Started

- Housekeeping items
- Pre-Assignment Review
- Parking Lot
- Workshop Objectives
- Action Plans

#### Module Two: Defining Yourself (I)

- If You Don't, They Will
- Brand Mantra
- Be Real
- SWOT Analysis
- Case Study

#### Module Three: Defining Yourself (II)

- Pillars
- Passions
- Define Your Strengths
- The Three C's
- Case Study

#### Module Four: Controlling and Developing Your Image

- Clear and Defined
- Consistent Image
- It Takes a Commitment
- Live It Every Day
- Case Study

#### Module Five: Personal and Professional Influences

- Corporate and Personal Integration
- They Will Influence Each Other
- Be a Professional
- Build Rapport

#### Module Six: Sharpening Your Brand

- Blogging
- Authenticity is Key (always be authentic)
- Transparency
- Networking
- Case Study

#### Module Seven: Appearance Matters

- First Impressions
- Rise Out of The Crowd
- True Reflection
- Dress For Success
- Case Study

#### Module Eight: Social Media (I)

- Needs Constant Monitoring
- Security
- Have an Objective
- Promote
- Case Study

#### Module Nine: Social Media (II)

- It's a Tool
- Content is King
- Have a Gimmick
- Don't Ignore Any Mentions
- Case Study

#### Module Ten: Brand Management During a Crisis

- Caught In a Bad Spot?
- Never Burn a Bridge
- Information
- Monitor and Respond
- Case Study

#### Module Eleven: Branding Personality Traits

- Identify Your Unique Values
- Be Bold
- Think Outside the Box
- Fail. Learn. Repeat
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



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# PROJECT MANAGEMENT

## LEARN THE KEY ELEMENTS OF MANAGING PROJECTS OF ANY SIZE

In the past few decades, organizations have discovered something incredible: the principles that have been used to create enormous successes in large projects can be applied to projects of any size to create amazing success. As a result, many employees are expected to understand project management techniques and how to apply them to projects of any size.

The Project Management workshop will give participants an overview of the entire project management process, as well as key project management tools that they can use every day. Working with project planning documents, such as needs assessments, risk management plan, and a communication plan will provide benefits throughout your organization.

### Project Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Key Concepts (I)

- What is a Project?
- What is Project Management?
- What is a Project Manager?

#### Module Three: Key Concepts (II)

- About the Project Management Institute (PMI)
- About the Project Management Body Of Knowledge (PMBOK)
- The Five Process Groups
- The Nine Knowledge Areas
- The Triple Constraint

#### Module Four: Initiation (I)

- Identifying Your Stakeholders
- Assessing Needs and Wants
- Setting a SMART Project Goal
- Creating Requirements and Deliverables

#### Module Five: Initiation (II)

- Creating a Statement of Work
- Completing the Project Planning Worksheet
- Completing the Project Charter

#### Module Six: Planning (I)

- Managing Expectations
- Creating a Task List
- Estimating Time
- Estimating Resources
- Estimating Costs

#### Module Seven: Planning (II)

- Building the Work Breakdown Structure
- Creating the Schedule
- Creating a Risk Management Plan
- Creating a Communication Plan

#### Module Eight: Planning Tools

- The Gantt Chart
- The Network Diagram
- Using a RACI Chart
- Going the Extra Mile: Microsoft Project

#### Module Nine: Executing the Project

- Establishing Baselines
- Monitoring Project Progress
- Triple Constraint Reduction Methods

#### Module Ten: Maintaining and Controlling the Project

- Making the Most of Status Updates
- Managing Change
- Monitoring Risks

#### Module Eleven: Closing Out

- Preparing for Closeout
- Celebrating Successes
- Learning from Project Challenges
- Scope Verification
- A Final To-Do List

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# TELEWORK & TELECOMMUTING

## ACQUIRE KNOWLEDGE & SKILLS FOR EFFECTIVE AWAY-FROM-OFFICE MANAGEMENT

Working in a home office requires a unique set of skills. Teleworkers or virtual employees have additional challenges created by not being in a centralized office. Communication issues alone make it a challenging job, and recognizing these challenges will help this class' participants become great teleworkers.

Through this Telework And Telecommuting course you and your employees will see a great improvement in performance and well-being. Being a teleworker does have the advantages of flexible schedules, no commute, and saving the company money. Participants will establish the additional skills needed to be successful in their work from home environment.

### Telework & Telecommuting - Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Core Skills Required

- Self-Management
- Time Management
- Organizing and Planning
- Communication
- Case Study

#### Module Three: Self-Management (I)

- Solving Problems on Your Own
- Being and Staying Motivated
- You Have More Freedom, Don't Abuse It
- You and Only You are Accountable
- Case Study

#### Module Four: Self-Management (II)

- Recognize and Remove Bad Habits
- Reflect on Mistakes, and Learn from Them
- Establish Good Habits
- Be Assertive With Yourself
- Case Study

#### Module Five: Time Management (I)

- Build a Little Flexibility Into Your Schedule
- Identify and Remove Time Wasters
- Working with Time Zones
- Using Free Time Wisely
- Case Study

#### Module Six: Time Management (II)

- The Urgent/Important Matrix
- Setting and Sticking to Deadlines
- The Glass Jar: Rocks, Pebbles, Sand, and Water
- Recognize When You are Procrastinating
- Case Study

#### Module Seven: Organization and Planning (I)

- Plan for Additional Stress
- When to Seek Help
- Being Proactive, not Reactive
- Establish Priorities and Attainable Goals
- Case Study

#### Module Eight: Organization and Planning (I)

- Setting up Your Home Office
- Remove Unneeded or Distracting Items
- When Technology Fails?
- Develop a Normal Working Day
- Case Study

#### Module Nine: Communication (I)

- Stay in the Loop
- Use the Correct Medium
- Be Clear and To the Point
- Virtual Communication Can Be Impersonal
- Case Study

#### Module Ten: Communication (II)

- Open and Frequent Communication
- Share Your Information
- Have a Collaborative Attitude
- Setting Expectations with Family and Friends
- Case Study

#### Module Eleven: Additional Challenges

- Building Trust and Rapport
- Feeling Isolated
- Always in the Office
- Lack of or Less Feedback
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# THE CLOUD & BUSINESS

## DISCOVER HOW THE CLOUD CAN WORK VERY WELL FOR YOU

The cloud has become a vital component for business as technology becomes embedded in modern life. Every leader needs to understand the cloud and how it operates as well as the potential dangers and pitfalls associated with cloud computing. Knowledgeable monitoring and maintenance can be the difference between the success and failure of the technology's use.

With The Cloud and Business workshop, you will discover the specifics of how the cloud can be a useful business tool. With a clear understanding of the cloud, you will be able to make the best decisions for your customers and business.

### The Cloud & Business - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Cloud

- Definition
- History
- Current Uses
- Trends
- Case Study

#### Module Three: Models for Business

- Software as a Service
- Platform as a Service
- Infrastructure as a Service
- Other Options
- Case Study

#### Module Four: Advantages

- Data Center Finances
- Labor Finances
- Productivity
- Ease of Use
- Case Study

#### Module Five: Address Risks

- Assessment
- Prioritize Concerns
- Address Risks
- Focus on Success
- Case Study

#### Module Six: Security

- Understand Weaknesses
- Breaches
- Identity Management
- Strategies
- Case Study

#### Module Seven: Device Management

- Devices that Can Connect
- Desktops
- Benefits
- Monitoring
- Case Study

#### Module Eight: Service Oriented Architecture

- Definition
- With the Cloud
- Services
- Benefits to the Business
- Case Study

#### Module Nine: Business Processes

- Scale Applications
- Web-based
- Examples
- Predictions
- Case Study

#### Module Ten: Standards

- Best Practices
- Organizational Standards
- Standards in the Cloud
- Interoperability and Integration
- Case Study

#### Module Eleven: Monitoring

- Governance
- Measure Performance
- Methods of Measurement
- Monitor Services
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

**YOU  
WILL  
LEARN**

# TIME MANAGEMENT

## LEARN CRUCIAL STRATEGIES TO BE MORE EFFECTIVE AND EVEN MORE SUCCESSFUL

Personal time management skills are essential for professional success in any workplace. Those able to successfully implement time management strategies are able to control their workload rather than spend each day in a frenzy of activity reacting to crisis after crisis - stress declines and personal productivity soars! These highly effective individuals are able to focus on the tasks with the greatest impact to them and their organization.

The Time Management workshop will cover strategies to help participants learn these crucial strategies. You will be given a skill set that includes personal motivation, delegation skills, organization tools, and crisis management.

### Time Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Goal Setting

- The Three P's
- S.M.A.R.T. Goals
- Prioritizing Your Goals
- Visualization

#### Module Three: Prioritizing Your Time

- The 80/20 Rule
- The Urgent Versus Important Matrix
- Assertiveness

#### Module Four: Planning Wisely

- Creating Your Productivity Journal
- Maximizing the Power of Your Productivity Journal
- The Glass Jar: Rocks, Pebbles, Sand, and Water
- Chunk, Block, and Tackle
- Ready, Fire, Aim!

#### Module Five: Tackling Procrastination

- Why We Procrastinate
- Nine Ways to Overcome Procrastination
- Eat That Frog!

#### Module Six: Crisis Management

- When the Storm Hits
- Creating a Plan
- Executing the Plan
- Lessons Learned

#### Module Seven: Organizing Your Workspace

- De-Clutter
- Managing Workflow
- Dealing with E-mail
- Using Calendars

#### Module Eight: Delegating Made Easy

- When to Delegate
- To Whom Should You Delegate?
- How Should You Delegate
- Keeping Control
- The Importance of Full Acceptance

#### Module Nine: Setting a Ritual

- What is a Ritual?
- Ritualizing Sleep, Meals, Exercise
- Examples of Rituals
- Using Rituals & Maximize Time

#### Module Ten: Meeting Management

- Deciding if a Meeting is Necessary
- Using the PAT Approach
- Building the Agenda
- Keeping Things on Track
- Making Sure the Meeting Was Worthwhile

#### Module Eleven: Alternatives to Meetings

- Instant Messaging and Chat Rooms
- Teleconferencing
- E-mail Lists and Online Groups
- Collaborating Applications

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# WOMEN IN LEADERSHIP

## EMPOWERING WOMEN TO LEADERSHIP ROLES & IMPROVING YOUR BUSINESS

Often, people who have never had a leadership role will stand up and take the lead when a situation they care about requires it. You will be able recognize these events and grab the reins with more confidence. This workshop touches on understanding the leadership gap, vital leadership traits, and how to overcome various barriers.

With our Women in Leadership workshop you will learn how women are changing the workforce. Through this workshop, you will gain a new perspective on the workforce, and what benefits can come from hiring and promoting women to higher positions.

### Women in Leadership - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: Women and the Workforce

- 50% of the Population
- 60% of College Degrees
- 47% of the US Workforce
- 52% of Professional-level Jobs
- Case Study

#### Module Three: The Leadership Gap

- Underrepresented in Leadership
- Executive Positions
- Finance, Health Care, and Law
- Historical Trends
- Case Study

#### Module Four: Barriers to Women's Leadership

- Gender Differences are Overemphasized
- Gender Differences are Undervalued
- Women Lack Professional Networks
- Work and Family Conflict
- Case Study

#### Module Five: Traits of Women's Leadership

- Lead by Uniting Diverse Groups
- Value Work-life Balance
- Value Interpersonal Relationships
- Value Accountability
- Case Study

#### Module Six: Benefits of Women's Leadership

- Greater Collaboration
- Culture of Work-life Balance
- Culture of Accountability
- Assists in Recruiting Millennials
- Case Study

#### Module Seven: Nurturing Women's Leadership

- Actively Recruit Women
- Create/Encourage Networking Opportunities
- Pair Women with Mentors in Leadership
- Create/Encourage Training Opportunities
- Case Study

#### Module Eight: Actively Recruit Women

- Discover your Barriers to Hiring
- Discover your Barriers to Retention
- Recruit via Women's Organizations
- Women-friendly Culture
- Case Study

#### Module Nine: Create/Encourage Women's Networking Opportunities

- Create a Women's Networking Group
- Encourage Joining Organizations
- Networking Builds Confidence
- Networking and Recruiting
- Case Study

#### Module Ten: Pair Women with Mentors

- Benefits of Mentoring
- Think Creatively
- Incorporate at Every Stage
- Encourage Women to Mentor
- Case Study

#### Module Eleven: Create and Encourage Educational Opportunities

- Encourage Learning of Leadership Skills
- Internal Programs and Trainings
- Outside Programs and Trainings
- Encourage Training at Every Career Stage
- Case Study

#### Module Twelve: Wrapping Up

- Words From The Wise
- Review Of The Parking Lot
- Lessons Learned
- Recommended Reading
- Completion Of Action Plans And Evaluations

# PERSONAL DEVELOPMENT

YOU  
WILL  
LEARN

# ADULT LEARNING MENTAL SKILLS

## UNDERSTANDING HOW WE LEARN, AND HOW TO DO IT BETTER

Bloom's Taxonomy is not just for elementary school teachers. The three domains of the taxonomy apply to adult education as well. In this workshop, we will pay attention to the cognitive domain. This is the domain of knowledge and intellect, and it is the main focus of most educators.

With this Adult Learning: Mental Skills workshop, participants will discover the specifics of how the cognitive domain increases intellectual capability.

### Adult Learning - Mental Skills - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Bloom's Taxonomy

- Bloom's Theory
- History
- New Understanding
- Definition
- Case Study

#### Module Three: Knowledge

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Four: Comprehension

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Five: Application

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Six: Analysis

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Seven: Synthesis

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Eight: Evaluation

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Nine: Updated Version

- Remembering and Understanding
- Applying and Analyzing
- Evaluating
- Creating
- Case Study

#### Module Ten: Types of Knowledge

- Factual
- Conceptual
- Procedural
- Metacognitive
- Case Study

#### Module Eleven: Training

- Examples
- Problem Solving
- Qualitative Assessments
- Create Plans
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# ADULT LEARNING PHYSICAL SKILLS

## UNDERSTANDING HOW WE PHYSICALLY OPERATE AND HOW TO IMPROVE

Bloom's Taxonomy is not just for elementary school teachers. The three domains of the taxonomy apply to adult education as well. In this manual, we will pay attention to the psychomotor domain. This is the domain of action and physicality. It is important to remember that psychomotor works together with the other domains when implementing it.

With our Adult Learning - Physical Skills workshop, participants will discover how to better navigate their physical environment. The understanding and coordination of physical skills provides an incredible benefit to everyone.

### Adult Learning - Physical Skills - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Bloom's Taxonomy

- Bloom's Theory
- History
- New Understanding
- Definition
- Case Study

#### Module Three: Observation

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Four: Imitation

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Five: Manipulation

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Six: Precision

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Seven: Articulation

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Eight: Naturalization

- Behavior
- Actions
- Examples
- Implementation
- Case Study

#### Module Nine: Versions of Psychomotor Domain

- Dave's Theory
- Harrow
- Simpson
- Differences and Similarities
- Case Study

#### Module Ten: Psychomotor Measurements

- Agility
- Precision
- Endurance
- Speed
- Case Study

#### Module Eleven: Skills to Consider when Planning

- Gross Movement
- Fine Motor Control
- Verbal
- Nonverbal
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations



YOU  
WILL  
LEARN

# ANGER MANAGEMENT

## LEARN TO IDENTIFY TRIGGERS AND CONTROL YOURS OR OTHERS' ANGER

Controlling and limiting anger is important in every aspect of one's life. Without control you are putting limits on what you can accomplish. Anger can be an incredibly damaging force, costing people their jobs, and personal relationships. However, since everyone experiences anger at some level, having a constructive approach to manage it effectively can turn it into a valuable asset.

Our Anger Management workshop will give participants that constructive approach. Participants will learn how to identify their anger triggers and what to do when they get angry. Through specific coping and planning techniques, anger can become a positive tool.

### Anger Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Anger

- The Cycle of Anger
- Understanding Fight or Flight
- Common Myths About Anger

#### Module Three: Do's and Don'ts

- Unhelpful Ways of Dealing with Anger
- Helpful Ways of Dealing with Anger

#### Module Four: Gaining Control

- A Word of Warning
- Using Coping Thoughts
- Using Relaxation Techniques
- Blowing off Some Steam

#### Module Five: Separate the People from the Problem

- Objective vs. Subjective Language
- Identifying the Problem
- Using 'I' Messages

#### Module Six: Working on the Problem

- Using Constructive Disagreement
- Negotiation Tips
- Building Consensus
- Identifying Solutions

#### Module Seven: Solving the Problem

- Choosing a Solution
- Making a Plan
- Getting it Done

#### Module Eight: A Personal Plan

- Understanding Hot Buttons
- Identifying Your Hot Buttons
- A Personal Anger Log

#### Module Nine: The Triple A Approach

- Alter
- Avoid
- Accept

#### Module Ten: Dealing with Angry People

- Understanding the Energy Curve
- De-Escalation Techniques
- When to Back Away and What To Do Next

#### Module Eleven: Pulling it All Together

- Process Overview
- Putting it Into Action

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
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# ATTENTION MANAGEMENT

## LEARN HOW TO TURN A LACK OF ATTENTION INTO PRODUCTIVITY

A distracted employee is a less effective employee. Employees who do not pay attention can waste valuable time and make careless mistakes. You can ensure they are more efficient at their job, make fewer mistakes, and be more productive overall.

Attention Management is a useful skill that allows managers to connect with their employees on an emotional level and motivate them to focus on their work. Our workshop will help you participants reach their personal and in turn company goals. They will gain valuable insight and strategies into what it takes to be more attentive and vigilant.

### Attention Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Introduction to Attention Management

- What Is Attention Management?
- Stop Thinking and Pay Attention!
- What Is Mushin?
- What is Xin Yi (Heart Minded)?

#### Module Three: Types of Attention

- Focused Attention
- Sustained Attention
- Selective Attention
- Alternating Attention
- Attention CEO
- Attentional Blink

#### Module Four: Strategies for Goal Setting

- Listening to Your Emotions
- Prioritizing
- Re-Gating

#### Module Five: Meditation

- Beta
- Alpha
- Theta
- Delta
- Gamma

#### Module Six: Training Your Attention

- Mushin
- Meditation
- Focus Execute
- Visualization
- Case Study

#### Module Seven: Attention Zones Model

- Reactive Zone
- Proactive Zone
- Distracted Zone
- Wasteful Zone
- Case Study

#### Module Eight: SMART Goals

- The Three P's
- The SMART Way
- Prioritizing
- Evaluating and Adapting

#### Module Nine: Keeping Yourself Focused

- The One Minute Rule
- The Five-Minute Rule
- What to Do When You Feel Overwhelmed

#### Module Ten: Procrastination

- Why We Procrastinate
- Nine Ways to Overcome Procrastination
- Eat That Frog

#### Module Eleven: Prioritizing Your Time

- The 80/20 Rule
- The Urgent / Important Matrix
- Being Assertive
- Creating a Productivity Journal
- The Glass Jar: Rocks, Pebbles, Sand and Water

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
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# BEING A LIKEABLE BOSS

## LEARN HOW TO IMPROVE LEADERSHIP AND INCREASE PERFORMANCE

Being more likeable is a quality everyone can grow and improve. Being likeable and a figure of authority is where some challenging conflicts can arise. With this workshop you will recognize these possible areas of conflict and develop the skills and knowledge to overcome them.

This Being a Likeable Boss workshop will show that honesty and trust will be your biggest tools in fostering a better relationship with your employees. Trusting your team by avoiding micromanagement, using delegation, and accepting feedback will put you on the right path to be a more likeable boss, and get outstanding results.

### Being A Likeable Boss - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: Is it Better to be Loved or Feared?

- The Case for Fear
- The Case for Love
- The Case Against Both
- The Middle Ground
- Case Study

#### Module Three: Leadership as Service

- Top Down Hierarchies
- The Bottom-Up Perspective
- Know Your Employees
- Genuine Empathy and the Power to Lead
- Case Study

#### Module Four: Leadership by Design

- Begin with the End in Mind
- Goals
- Values
- Mission Statement
- Case Study

#### Module Five: Understanding Motivation

- Dramatism
- The Pentad
- Guilt and Redemption
- Identification
- Case Study

#### Module Six: Constructive Criticism

- What are Your Intentions?
- A Positive Vision of Success
- Feedback Sandwich
- Following Up versus Badgering
- Case Study

#### Module Seven: The Importance of Tone

- Lighting a Fire
- Putting Out a Fire
- Adult versus Parent
- Changing the Script
- Case Study

#### Module Eight: Trusting Your Team

- Dangers of Micromanaging
- Delegation and Anxiety
- Aces in Their Places
- Celebrating Success
- Case Study

#### Module Nine: Earning Your Team's Trust

- Honesty
- Consistency
- Availability
- Openness
- Case Study

#### Module Ten: Building and Reinforcing Your Team

- Identify Team Strengths and Weaknesses
- Identify Team Roles
- Design Exercises with Specific Goals
- What to Avoid
- Case Study

#### Module Eleven: You are the Boss of You

- What Kind of Person Would You Follow?
- Self-Awareness
- Self-Improvement
- Keeping Your Balance
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# CRITICAL THINKING

## ANALYSE & EVALUATE INFORMATION, MAKE CORRECT DECISIONS, MINIMIZE DAMAGES

Critical Thinking provides you with the skills to analyze and evaluate information. With these skills you are able to obtain the greatest amount of knowledge from a piece of data. It provides the best chance of making the correct decision, and minimizes damages if a mistake does occur.

This Critical Thinking workshop will lead you to be a more rational and disciplined thinker. It will reduce your bias which will provide a greater understanding of your environment. This workshop will provide you the skills to evaluate, identify, and distinguish between relevant and irrelevant information which will provide an incredible boost in performance.

### Critical Thinking - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Components of Critical Thinking

- Applying Reason
- Open Mindedness
- Analysis
- Logic
- Case Study

#### Module Three: Non-Linear Thinking

- Step Out of Your Comfort Zone
- Don't Jump to Conclusions
- Expect and Initiate Change
- Being Ready to Adapt
- Case Study

#### Module Four: Logical Thinking

- Ask the Right Questions
- Organize the Data
- Evaluate the Information
- Draw Conclusions
- Case Study

#### Module Five: Critical Thinkers (I)

- Active Listening
- Be Curious
- Be Disciplined
- Be Humble
- Case Study

#### Module Six: Critical Thinkers (II)

- Seeing the Big Picture
- Objectivity
- Using Your Emotions
- Being Self-Aware
- Case Study

#### Module Seven: Evaluate Information

- Making Assumptions
- Watch out for Bias
- Ask Clarifying Questions
- SWOT Analysis
- Case Study

#### Module Eight: Benefits of Critical thinking

- Being More Persuasive
- Better Communication
- Better Problem Solving
- Increased Emotional Intelligence
- Case Study

#### Module Nine: Resolving Conflict

- Limitations of Your Point of View
- Considering Others Viewpoint
- Influences on Bias
- When New Information Arrives
- Case Study

#### Module Ten: Problem Solving

- Identify Inconsistencies
- Trust Your Instincts
- Asking Why?
- Evaluate the Solution(s)
- Case Study

#### Module Eleven: Putting It All Together

- Retaining Your New Skills
- Reflect and Learn From Mistakes
- Always Ask Questions
- Practicing Critical Thinking
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# EMOTIONAL INTELLIGENCE

**UNDERSTAND EMOTIONS, GET BETTER INSIGHT & CONTROL, CREATE POSITIVE IMPACT**

Emotional intelligence describes the ability to understand one's own feelings. It also provides great insight on how emotion influences motivation and behavior. The concepts of Emotional Intelligence have been around since the early 20th century, but the term was first introduced by Wayne Payne in 1985.

With this Emotional Intelligence workshop you will gain a better understanding of self-management and self-awareness. This in turn will give you better insight and control over your actions and emotions. With a greater understanding of emotions you will experience a positive impact on your professional and personal lives.

## Emotional Intelligence - Course Outline

### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

### Module Two: What is Emotional Intelligence

- Self Management
- Self Awareness
- Self Regulation
- Self Motivation
- Empathy

### Module Three: Four Skills in Emotional Intelligence

- How to Accurately Perceive Emotions
- Use Emotions to Facilitate Thinking
- Understand Emotional Meanings
- Manage Emotions

### Module Four: Verbal Communication Skills

- Focused Listening
- Asking Questions
- Communicating with Flexibility and Authenticity

### Module Five: Non-Verbal Communication Skills

- Body Language
- The Signals You Send to Others
- It's Not What You Say, It's How You Say It

### Module Six: Social Management and Responsibility

- Benefits of Emotional Intelligence
- Articulate your Emotions Using Language

### Module Seven: Tools to Regulate Your Emotions

- Seeing the Other Side
- Self Management and Self Awareness
- Giving in Without Giving Up

### Module Eight: Gaining Control

- Using Coping Thoughts
- Using Relaxation Techniques
- Bringing it All Together

### Module Nine: Business Practices (I)

- Understand Emotions and How to Manage Them in the Workplace
- Role of Emotional Intelligence at Work
- Disagreeing Constructively

### Module Ten: Business Practices (II)

- Optimism
- Pessimism
- The Balance Between Optimism & Pessimism

### Module Eleven: Making an Impact

- Creating a Powerful First Impression
- Assessing a Situation
- Being Zealous without Being Offensive

### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

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# GOAL SETTING & GETTING THINGS DONE

## LEARN TO IMPROVE YOUR SKILLS AND EASILY YOUR PEOPLE

Goal Setting is one of the most basic and essential skills someone can develop. We touch on goal characteristics, time management, and what to do when setbacks occur. This workshop will provide the knowledge and skills you need to complete more tasks, and get things done.

This Goal Setting and Getting Things Done workshop will cover strategies to help you deal with distractions and overcome procrastination. These skills will translate into increased satisfaction in your professional and personal lives. You will learn the Goal Setting characteristics of successful people and in turn will become happier and more productive.

### Goal Setting & Getting Things Done - Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Overcoming Procrastination (I)

- Eat That Frog!
- Just Do It
- The 15 Minute Rule
- Chop it Up
- Case Study

#### Module Three: Overcoming Procrastination (II)

- Remove Distractions
- Start Small and Build
- Reward Yourself
- Set Realistic Deadlines
- Case Study

#### Module Four: Four P's of Goals Setting

- They Need to be Positive
- They Need to be Personal
- They Need to be Possible
- They Need to be Prioritized
- Case Study

#### Module Five: Improving Motivation

- Remember Peak Moments
- Write Your Goals Down
- Use Gamification
- Track Your Progress
- Case Study

#### Module Six: Wise Time Management

- Urgent/Important Matrix
- The 80/20 Rule
- Utilize a Calendar
- Create a Ritual
- Case Study

#### Module Seven: Tips for Completing Tasks

- One Minute Rule
- Five Minute Rule
- Break Up Large Tasks
- Utilize Technology
- Case Study

#### Module Eight: Increase Your Productivity

- Repeat What Works
- Get Faster
- Remove 'should' from Your Dictionary
- Build on Your Successes
- Case Study

#### Module Nine: To Do List Characteristics

- Focus on the Important
- Chunk, Block, Tackle
- Make It a Habit
- Plan Ahead
- Case Study

#### Module Ten: SMART Goals

- Specific
- Measurable
- Attainable
- Realistic
- Timely
- Case Study

#### Module Eleven: Mistakes Will Happen

- Accept It
- Bouncing Back
- Adapt and Learn from Them
- If Needed, Ask for Help
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# IMPROVING MINDFULNESS

## BETTER UNDERSTAND YOUR ENVIRONMENT & EXPERIENCE COUNTLESS BENEFITS

Improving mindfulness is about understanding yourself and being “in the moment”. You will become more mindful of your actions and learn how to express and interpret your present environment. You will create positive connections and increase your self-regulation of attention and personal experiences.

Improving Mindfulness will provide benefits throughout your professional and personal lives. Improving mindfulness through gratitude, filtering, and active listening will give you the advantage of seeing things in a new light. This workshop has the ability to give you an increased recognition of mental events in the present moment which provides countless benefits.

### Improving Mindfulness - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: What is Mindfulness?

- Buddhist Concept
- Bare Attention
- Memory
- Psychological Concept
- Case Study

#### Module Three: Practicing Mindfulness

- Mindfulness Meditation
- Attention
- Acceptance
- Scanning
- Case Study

#### Module Four: Emotional IQ

- Purpose of Emotions
- Performance Emotions
- Swing Emotions
- Blue emotions
- Case Study

#### Module Five: Cognitive Distortion I

- Dichotomous Reasoning
- Magnification and Minimization
- Filtering (Including Disqualifying)
- Jumping to Conclusions
- Case Study

#### Module Six: Cognitive Distortion II

- Destructive Labelling
- Personalizing
- Blaming
- The Tyranny of the Should
- Case Study

#### Module Seven: Mindfulness Based Cognitive Therapy

- Mental Modes
- Doing Mode
- Being Mode
- Metacognitive Awareness
- Case Study

#### Module Eight: Mindfulness and Gratitude

- What is Gratitude?
- Gratitude Journal
- Gratitude Exercise
- How to Form a Habit
- Case Study

#### Module Nine: Cultivating High Performance Emotions

- Emotion-Cognition-Behavior Triangle
- Cultivating Enthusiasm
- Cultivating Confidence
- Cultivating Tenacity
- Case Study

#### Module Ten: Mindfulness and Customer Service

- Individually Focused
- Active Listening
- Building a Rapport
- Timing
- Case Study

#### Module Eleven: Mindfulness and Leadership

- Mental Resilience
- Focus
- Compassion
- Creativity
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# IMPROVING SELF- AWARENESS

## IMPROVE SELF-CONTROL & PRODUCTIVITY, REDUCE STRESS & INTERNAL TURMOIL

Self-awareness is developing an understanding of your emotions and feelings. It is an awareness of the physical, emotional, and psychological self. You will identify ways of recognizing all of these and improving each through various cognitive and learning styles.

This Improving Self-Awareness workshop will improve self-control, reduce procrastination, and develop mood management. You will improve your relationships and create a more fulfilling life. These improvements will in turn translate into a wholly improved workforce. Stress will decline and productivity will increase as internal turmoil will decline all through improving self-awareness.

### Improving Self-Awareness - Course Outline

**Module One: Getting Started**

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

**Module Two: What is the Self?**

- The Physical Self
- The Emotional Self
- The Psychological Self
- The Spiritual Self
- Case Study

**Module Three: Awareness of the Physical Self**

- Scanning
- Progressive Relaxation
- Physical Stressors
- Exercise
- Case Study

**Module Four: Time Management**

- Organization
- Goal Management
- Priorities
- Procrastination
- Case Study

**Module Five: The Emotional Self**

- Validity of Emotions
- Utility of Emotions
- Arousal
- Valence
- Case Study

**Module Six: Mood Management**

- Emotional Intelligence
- Categories of Emotions
- Increasing Arousal
- Decreasing Arousal
- Case Study

**Module Seven: The Psychological Self**

- Thinking Style
- Learning Style
- Personality Style
- Distorted Thinking
- Case Study

**Module Eight: Interpersonal Awareness**

- Addressing Different Thinking Styles
- Addressing Different Learning Styles
- Active Listening and Body Language
- Transactional Analysis
- Case Study

**Module Nine: The Spiritual Self**

- Mindfulness
- Meditation
- Cultivating Positivity
- Gratitude
- Case Study

**Module Ten: Limitations of Self-Awareness**

- Navel Gazing
- Dangers of Excessive Self Discipline
- Humility
- Empathy
- Case Study

**Module Eleven: Independence Versus Interdependence**

- What is Interdependence?
- Systems Theory
- More than the Sum of All Parts
- Team Building
- Case Study

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations



# INCREASING YOUR HAPPINESS

## LEARN HOW TO BE HAPPIER, INCREASE PRODUCTIVITY, GET MORE OUT OF LIFE

Increasing ones happiness can be done through the power of positive thinking. That is just one of the skills that this workshop will touch on to teach participants how to be happier. Happiness will spread throughout your organization, and have a positive effect on everyone.

With this Increasing Your Happiness workshop participants will engage in unique and helpful ways to increase their happiness. This will have a robust effect on their professional and personal lives. It will improve their communication skills, increase productivity, and lessen absenteeism.

### Increasing Your Happiness - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- Pre-Assignment Review
- Workshop Objectives
- The Parking Lot
- Action Plan

#### Module Two: Plan Ahead For Happiness

- Have A Nightly Routine
- Get At Least Eight Hours Of Sleep
- Wake Up Early
- Give Yourself Extra Commute Time
- Case Study

#### Module Three: Plan Your Day

- Arrive 10-15 Minutes Early
- Check Your Calendar For Action Items
- Create A To Do List For The Day
- Build In Breaks
- Case Study

#### Module Four: Relate To Others

- Greet Your Colleagues
- Smile!
- Build Your Support Team And Check In Regularly
- Take Time To Socialize
- Case Study

#### Module Five: Go To Your Happy (Work) Space

- Create A Workspace That Makes You Happy
- Clear The Clutter
- Bring In Personal Touches
- Add Some Green!
- Case Study

#### Module Six: Accentuate The Positive

- Use A Daily Affirmation
- Surround Yourself With Positive People
- Limit Your Negative Interactions
- Build Friendships
- Case Study

#### Module Seven: Use Your Benefits

- Use Your Vacation And Paid Time Off!
- Exercise Your Way To Happy!
- Employee Assistance Programs
- Other Benefits – Credit Union, Direct Deposit, Etc.
- Case Study

#### Module Eight: Take Control Of Your Career Happiness

- Take Control Of Your Professional Development
- Seek Frequent Feedback
- Practice Professional Courage
- Seek Mentoring, And Seek To Mentor Others
- Case Study

#### Module Nine: Set Boundaries

- Learn To Say No
- Learn To Say Yes
- Protect Your Downtime
- Know When To Call It A Day
- Case Study

#### Module Ten: Practice Positivity

- Keep Your Interactions Positive
- Practice Gratitude
- Address Conflict Or Misunderstandings Directly And Positively
- Look For The Silver Lining
- Case Study

#### Module Eleven: Choose To Be Happy

- Happiness Is A Choice
- Choose Your Stress Response
- Do One Thing Each Day That You Love And Enjoy
- Seek To Make Positive Changes
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

# JOB SEARCH SKILLS

## LEARN HOW TO LAND THE PERFECT JOB THROUGH AN EASY, EFFECTIVE & COMFORTABLE PROCESS

Searching for a job can be intimidating. How do you know what job you are best suited for? How do you build a winning resume and cover letter? Where can you find job leads? How do you network without feeling nervous? What happens when you land an interview? And most importantly, where do you find help when you need it?

The Job Search Skills workshop will give you the answers to all these questions, plus a plan to get you to a new job within a month. After completing this program, you will be more than ready to start your search for your perfect job. Identifying the purpose for working and the assessment of skills can help determine the types of jobs you should apply for.

### Job Search Skills - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Ready, Set, Go!

- Identifying Your Values and Purpose
- Assessing Your Skills
- Setting SMART Goals
- Building a Resource System
- A 30-Day Plan

#### Module Three: Building Your Resume

- Basic Resume Formats
- Chronological Style Resume
- Combination Style Resume
- Essential Information to Include
- Dealing with Awkward Points
- Checklist for Success

#### Module Four: Polishing Your Resume

- Creating an Attractive Package
- About Branding
- Some Extra Touches
- Checklist for Success

#### Module Five: Writing a Cover Letter

- Types of Cover Letters
- First contact cover letter
- Targeted cover letter
- Recommendation Cover Letter
- Creating a Template
- Customizing the Template
- Checklist for Success

#### Module Six: Creating a Portfolio

- When Do I Need a Portfolio?
- Types of Portfolios
- Working Portfolio
- Display Portfolio
- Assessment Portfolio
- Essential Elements
- Checklist for Success

#### Module Seven: Networking Skills

- What is Networking?
- Getting a Conversation Started
- Creating an Effective Introduction
- But I'm So Nervous!
- What Not to Talk About
- Wrapping Up and Moving On

#### Module Eight: Skills for Success

- Being Organized
- Becoming a Punctual Person
- I Can Do This!
- Important Etiquette Points

#### Module Nine: Where to Look?

- The Obvious Places
- The Hidden Job Market
- About Cold Calling
- The Power of Networking

#### Module Ten: Understanding the Interview

- Types of Interviews
- What to Expect
- About Behavioral Questions
- About Knowledge Questions

#### Module Eleven: Interview Skills

- Dressing for Success
- The Meaning of Colors
- Interpreting Common Dress Codes
- Deciding What to Wear
- Answering Questions
- Asking Questions
- Following Up

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# LIFE COACHING ESSENTIALS

## LEARN TO SEEK AND ACCEPT GUIDANCE ABOUT WHAT MATTERS TO YOU

Many people often mistake a life coach for a mental health professional, such as a psychiatrist or a therapist. This misconception often leads people to believe they do not need a life coach since they feel as though nothing is wrong with their mental health. However, a life coach is designed to help improve a person's professional and personal life by working with them to achieve their goals.

With this Life Coaching Essentials workshop, you will discover the meaning of life coaching and how life coaching services can be utilized to achieve your goals in a more efficient manner, and sooner.

### Life Coaching Essentials - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Why You Need A Life Coach?

- Difficulty Making Life Decisions
- Prioritizing Projects and Timelines
- Urgent Situations
- Lack of Balance
- Case Study

#### Module Three: The Benefits of Life Coaching

- Set Performance Targets
- Cope with Pressure and Stress
- Develop and Maintain Vision
- Maintain Motivation
- Case Study

#### Module Four: Life Coaching Challenges

- Lack of Commitment
- Procrastination
- Poor Communication Skills
- Lack of Direction
- Case Study

#### Module Five: Basic Structure of a Coaching Session

- Develop an Action Plan
- Ask Questions
- Overcome
- Set timeline
- Case Study

#### Module Six: Essential Skills for Successful Coaching

- Listen with Curiosity
- Take in What you Hear
- Reflect with Accuracy
- Questioning for Exploration
- Case Study

#### Module Seven: Life Coaching Tools and Techniques

- Goal Tracking
- Journaling
- Life Coaching Assessments and Forms
- Homework Assignments and Action Items
- Case Study

#### Module Eight: Life Coaching Specialized Areas (I)

- Relationship Coaching, Dating Coaching
- Health Coaching, Fitness Coaching
- Family Coaching, Parenting Coaching
- Spiritual Coaching
- Case Study

#### Module Nine: Life Coaching Specialized Areas (II)

- General Life Coaching
- Image Coaching
- Communication Coaching, Creativity Coaching
- Career Coaching
- Case Study

#### Module Ten: Life Coaching Specialized Areas (III)

- Retirement Coaching
- Leadership Coaching, Performance coaching
- Business Coaching
- Executive Coaching
- Case Study

#### Module Eleven: Apply What You Learned to the Workplace

- Have a Game Plan
- Link Game Plan and Goals
- Do Drills
- Assess Progress
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Recommended Reading
- Completion of Action Plans and Evaluations

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# MANAGING PERSONAL FINANCES

## LEARN HOW TO EASILY MANAGE YOUR ASSETS USING A PERSONAL FINANCIAL ROAD MAP

As they grow up, most people are rarely taught the value of a good credit score. Finances end up creating stress and anxiety as many have a hard time formatting and sticking to a budget. One can easily solve the finance puzzle with a little hard work, self-control, and the right tools. Properly managing your finances is the first step to reclaiming your financial freedom.

Most people know that a map can tell them how to get from point A to point B. A well developed budget is just like a map as it helps you reach your financial goals. You start at point A, and the budget helps you go the distance get to point B. And with our Managing Personal Finances workshop you will learn how to budget, and create a plan for your future.

### Managing Personal Finances - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: The Benefits of Budgeting

- Getting Rid of Debt
- Generating Savings
- Reducing Stress and Anxiety
- Lessening Family Conflicts
- Case Study

#### Module Three: What to Consider Before Creating a Budget

- Understand Your Income
- Determine a Budget Duration
- Determine Expenses
- Track What's Being Spent
- Case Study

#### Module Four: Types of Fixed Personal Expenses

- Utility Bills
- Housing Bills
- Transportation
- Debt Payments
- Case Study

#### Module Five: Types of Fluctuating Personal Expenses

- Personal Care
- Entertainment
- Eating Out
- Case Study

#### Module Six: Establish Your Goals

- Short Term vs Long Term
- Be Realistic
- Actually Get Rid of Debt
- Save for the Future
- Case Study

#### Module Seven: Determine Where Cuts Can Be Made

- Cut Bad Habits
- Decrease Transportation Costs
- Reduce Utility Bills
- Decrease Entertainment Expenses
- Case Study

#### Module Eight: Tools

- Software
- Phone Applications
- The Envelope System
- Expenditure Notebook
- Case Study

#### Module Nine: Stick With Your Budget

- Use Cash for Weekly Allowance
- Accountability to Family or Friends
- Set Up a Different Account for Savings
- Remind Self of Benefit to Sticking with Budget
- Case Study

#### Module Ten: Additional Ways to Make Money

- Make and Sell Items
- Sell Unused Items
- Small Part-Time Job
- Recycle for Money
- Case Study

#### Module Eleven: Paying Off Debt

- Get Three Credit Reports
- Start with Small Stuff and Work Your Way Up
- Credit Card Hacks
- Investigate Student Loan Repayment or Consolidation Options
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# MANAGING WORKPLACE ANXIETY

## IMPORTANT SKILLS AND RESOURCES TO RECOGNIZE & MANAGE ANXIETY AT WORK

The workplace is one of the leading locations where people experience stress and anxiety. Every employee will encounter it sometime during their career. Everyone should be aware of the signs of anxiety and the tools needed to cope and deal with it.

This Managing Workplace Anxiety workshop will provide you the important skills and resources to recognize and manage workplace anxiety. By identifying these symptoms and coping skills employees and managers will be better suited in dealing with these common situations. Through this workshop you and your co-workers or employees will be better suited to the challenges that the workplace can bring.

### Managing Workplace Anxiety - Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Common Types of Anxiety

- Social Anxiety
- Generalized Anxiety Disorder
- Panic Disorder
- Phobias
- Case Study

#### Module Three: Recognizing Symptoms in Others

- Avoiding Social Situations
- Difficulty in Accepting Negative Feedback
- Difficulty in Focusing on Tasks
- Irrational Fears
- Case Study

#### Module Four: Coping Strategies (I)

- Keeping a Journal
- Power of Positive Thinking
- Have a 'Me' Place You Can Go
- Establish Attainable Goals
- Case Study

#### Module Five: Coping Strategies (II)

- Talk With Friends and Family
- Get Enough Sleep
- Eating Well and Exercise
- Begin Small and Build Up to Larger Challenges
- Case Study

#### Module Six: Don't Avoid the Situation

- It's OK to Make a Mistake
- Accept the Situation, and Move On
- Avoidance Can Cause a Cycle of Anxiety
- Identify the Trigger
- Case Study

#### Module Seven: Differences in Anxiety and Normal Nervousness

- It Runs Along a Spectrum
- Anxiety Can Happen Without a Cause
- The Length of Time Symptoms Last
- It's an Exaggeration of Normal Feelings
- Case Study

#### Module Eight: Physical Symptoms

- Rapid Heartbeat
- Panic Attack
- Headache
- Trembling or Shaking
- Case Study

#### Module Nine: Recognize the Positive Aspects of Anxiety

- It Alerts Us to Danger
- Improves Self-Awareness
- Can Be a Great Motivator
- Prevent Mistakes
- Case Study

#### Module Ten: Common Anxiety Triggers

- Uncertainty or Fear of the Unknown
- Holding in Feelings
- Public Speaking/Speaking Up
- Trying to Be Perfect
- Case Study

#### Module Eleven: When to Seek Extra Help?

- Feeling Overwhelmed
- Physical Changes
- Unable to Work or Function
- Panic Attacks
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

YOU  
WILL  
LEARN

# PERSONAL PRODUCTIVITY

## ESTABLISH ROUTINES, SET GOALS, MAXIMIZE PRODUCTIVITY

Most people find that they wish they had more time in a day. This workshop will show participants how to organize their lives and find those hidden moments. You will learn how to establish routines, set goals, create an efficient environment, and use time-honored planning and organizational tools to maximize your personal productivity.

Personal Productivity is a goal most of us have. Through this workshop you will be on the right track in achieving that goal. Some people blame everything that goes wrong in their life on something or someone else, but through this workshop participants will take ownership and begin to lead a more productive life.

### Personal Productivity - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Setting SMART Goals

- The Three P's
- The SMART Way
- Prioritizing Your Goals
- Evaluating and Adapting

#### Module Three: The Power of Routines

- What is a Routine?
- Personal Routines
- Professional Routines
- Six Easy Ways to Simplify Your Life

#### Module Four: Scheduling Yourself

- The Simple Secret of Successful Time Management
- Developing a Tracking System
- Scheduling Appointments
- Scheduling Tasks

#### Module Five: Keeping Yourself on Top of Tasks

- The One-Minute Rule
- The Five-Minute Rule
- What To Do When You Feel Like You're Sinking

#### Module Six: Tackling New Tasks and Projects

- The Sliding Scale
- A Checklist for Getting Started
- Evaluating and Adapting

#### Module Seven: Using Project Management Techniques

- The Triple Constraint
- Creating the Schedule
- Using a RACI Chart

#### Module Eight: Creating a Workspace

- Setting Up the Physical Layout
- Ergonomics 101
- Using Your Computer Efficiently

#### Module Nine: Organizing Files and Folders

- Organizing Paper Files
- Organizing Electronic Files
- Scheduling Archive and Clean-Up

#### Module Ten: Managing E-Mail

- Using E-mail Time Wisely
- Taking Action!
- Making the Most of Your E-mail Program
- Taking Time Back from Handheld Devices

#### Module Eleven: Tackling Procrastination

- Why We Procrastinate
- Nine Ways to Overcome Procrastination
- Eat That Frog!

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# PUBLIC SPEAKING

## GAIN CONFIDENCE AND LEARN HOW TO PREPARE, AND DELIVER A POWERFUL PRESENTATION

We often hear that a lot of people list public speaking as their biggest fear. Forget small spaces, darkness, and spiders, standing up in front of a crowd and talking is far more terrifying for most people. Through this workshop participants will become more confident and relaxed in front of an audience which will translate into a successful speaking event.

In addition, mastering this fear and getting comfortable speaking in public can be a great ego booster, not to mention a huge benefit to your career. The Public Speaking workshop will give you some basic public speaking skills, including in-depth information on developing an engaging program and delivering your presentation with power.

### Public Speaking - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Identifying Your Audience

- Performing a Needs Analysis
- Creating an Audience Profile
- Identifying Key Questions and Concerns

#### Module Three: Creating a Basic Outline

- Outlining the Situation
- Identifying the Task That Had to Be Performed
- Listing the Actions You Took
- Revealing the Results

#### Module Four: Organizing the Program

- Making Organization Easy
- Organizational Methods
- Classifying and Categorizing

#### Module Five: Fleshing It Out

- Identifying Appropriate Sources
- Establishing Credibility
- The Importance of Citations

#### Module Six: Putting It All Together

- Writing Your Presentation
- Adding a Plan B
- Reviewing, Editing, and Rewriting

#### Module Seven: Being Prepared

- Checking Out the Venue
- Gathering Materials
- A 24-Hour Checklist

#### Module Eight: Overcoming Nervousness

- A Visit from the Boss
- Preparing Mentally
- Physical Relaxation Techniques
- Appearing Confident in Front of the Crowd (Even If You Don't Feel That Way)

#### Module Nine: Delivering Your Speech I

- Starting Off on the Right Foot
- Using Visual Aids
- Checking the Volume of Your Voice

#### Module Ten: Delivering Your Speech II

- Adjusting on the Fly
- Gauging Whether Breaks Are Required
- Wrapping Up and Winding Down

#### Module Eleven: Questions and Answers

- Ground Rules
- Answering Questions That Sound Like an Attack
- Dealing with Complex Questions

#### Module Twelve: Wrapping Up

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# SOCIAL INTELLIGENCE

## UNDERSTAND YOUR ENVIRONMENT, INTERPRET SOCIAL CLUES, INCREASE YOUR INFLUENCE

Social Intelligence is about understanding your environment and having a positive influence. Participants will become more confident in their social situations by learning how to express and interpret social cues. They will create positive connections and increase their influence during social situations.

Increasing Social Intelligence will provide benefits throughout your professional and personal lives. It is a fantastic tool for coaching and development as people will learn 'people skills'. Improving social skills through active listening, understanding body language, and being more empathic will give you the advantage in your interactions. Social interactions are a two-way street, know the rules of the road.

### Social Intelligence - Course Outline

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment

#### Module Two: Increase Your Self-Awareness

- Remove or Limit Self-Deception
- Ask for Feedback
- Be Open to Change
- Reflect on Your Actions
- Case Study

#### Module Three: The Keys to Empathy

- Listening and Paying Attention
- Don't Judge
- Shift Your View
- Don't Show Fake Emotions
- Case Study

#### Module Four: Active Listening

- Attunement
- Don't Jump to Conclusions
- Shift your Focus
- Don't Discount Feelings
- Case Study

#### Module Five: Insight on Behavior

- Perception
- Facts vs. Emotion
- Online Communication
- Listen and Watch More
- Case Study

#### Module Six: Interpersonal Communication

- Give Respect and Trust
- Be Consistent
- Always Keep Your Cool
- Observing Body Language
- Case Study

#### Module Seven: Social Cues (I)

- Recognize Social Situations
- The Eyes Have It
- Non-Verbal Cues
- Verbal Cues
- Case Study

#### Module Eight: Social Cues (II)

- Spectrum of Cues
- Review and Reflect
- Being Adaptable and Flexible
- Personal Space
- Case Study

#### Module Nine: Conversation Skills

- Current Events
- Conversation Topics
- Cues to Watch For
- Give People Your Attention
- Case Study

#### Module Ten: Body Language

- Be Aware of Your Movements
- It's Not What You Say, It's How You Say It
- Open Vs. Closed Body Language
- Communicate with Power
- Case Study

#### Module Eleven: Building Rapport

- Take the High Road
- Forget About Yourself
- Remembering People
- Ask Good Questions
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
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# SOCIAL LEARNING

## LEARN NEW BEHAVIORS THROUGH OBSERVATION & DEVELOP A SOCIAL LEARNING CULTURE

Social Learning is an effective way to train employees through modeling positive behaviors. It is a great way to promote cohesion and involvement as it builds a culture of learning. Participants will learn the best way to conduct role plays, share best practices, and provide constant and immediate feedback.

With this Social Learning course you will be creating learning communities that benefit every aspect of your organization. You will learn new behaviors through observation and modeling and be instilled with a passion for learning.

### Social Learning - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Setting the Right Group Dynamic (I)

- Communicating
- Collaborating
- Sharing of Best Practices
- Refining Ideas
- Case Study

#### Module Three: Setting the Right Group Dynamic (II)

- Diversity Builds Knowledge
- Social Interactions
- People Are Different
- Dealing With Difficult People
- Case Study

#### Module Four: Develop a Social Learning Culture at Work (I)

- Making the Connection
- Tagging Star Employees
- Recognizing Teaching Movements
- Culture of Questioning
- Case Study

#### Module Five: Develop a Social Learning Culture at Work (II)

- Safe to Share Environment
- Instilling a Passion for Learning
- Instill a Sense of Sharing
- Learning in the Social Unit
- Case Study

#### Module Six: Develop a Social Learning Culture at Work (III)

- Remove Fear of Feedback or Criticism
- Creating a Social Unit
- Imitation and Modeling
- Empowering Learners
- Case Study

#### Module Seven: Role Playing (I)

- Identify Work Related Scenarios
- Add Variables
- Assign Roles
- Prepare Role-Players
- Case Study

#### Module Eight: Role Playing (II)

- Act it Out
- Debrief
- Mirror Good Examples
- General Role Playing Tips
- Case Study

#### Module Nine: Utilizing the Right Tools (I)

- Mentoring
- Social Media
- Critical Thinking
- Gamification
- Case Study

#### Module Ten: Utilizing the Right Tools (II)

- Relevant Resources Selection
- Job Shadowing
- Knowledge Management
- Social Facilitation
- Case Study

#### Module Eleven: Modeling and Observational Learning

- Inspired by Leaders
- Boosting Self-Efficacy
- Peer Role Models
- Generating Engagement
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
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# STRESS MANAGEMENT

## LEARN SKILLS, ROUTINES, TECHNIQUES AND A SYSTEM TO BETTER REDUCE & MANAGE STRESS

Positive and negative stress is a constant influence on all of our lives. The trick is to maximize the positive stress and to minimize the negative stress. Participants will be shown how stress can be positive and negative, and we'll look at the Triple A approach that will form the basis of this workshop.

The Stress Management workshop will give participants a three-option method for addressing any stressful situation, as well as a toolbox of personal skills, including using routines, relaxation techniques, and a stress log system. They will also understand what lifestyle elements they can change to reduce stress.

### Stress Management - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Stress

- What is Stress?
- What is Eustress?
- Understanding the Triple A Approach

#### Module Three: Creating a Stress-Reducing Lifestyle

- Eating Properly
- Exercising Regularly
- Sleeping Well

#### Module Four: Altering the Situation

- The First A
- Identifying Appropriate Situations
- Creating Effective Actions

#### Module Five: Avoiding the Situation

- The Second A
- Identifying Appropriate Situations
- Creating Effective Actions

#### Module Six: Accepting the Situation

- The Third A
- Identifying Appropriate Situations
- Creating Effective Actions

#### Module Seven: Using Routines to Reduce Stress

- Planning Meals
- Organizing Chores
- Using a To-Do List

#### Module Eight: Environmental Relaxation Techniques

- Finding a Sanctuary
- Using Music
- Seeing the Humor

#### Module Nine: Physical Relaxation Techniques

- Soothing Stretches
- Deep Breathing
- Tensing and Relaxing
- Meditation

#### Module Ten: Coping with Major Events

- Establishing a Support System
- Creating a Plan
- Knowing When to Seek Help

#### Module Eleven: Our Challenge to You

- Creating a Stress Log
- Week One: Recording Events
- Week Two: Identifying Stressors and Creating a Plan
- Week Three: Creating New Habits
- Reviewing and Evaluating

#### Module Twelve: Wrapping Up

- Words from the Wise
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# TAKING INITIATIVE

## LEARN WHEN & HOW TO STEP IN, USE JUDGMENT, GAIN CONFIDENCE AND BE PRO-ACTIVE

Taking the initiative is a crucial step in moving forward in our professional and personal lives. By showing initiative, it reflects us in a positive light to others as well as builds our own self-esteem. If we want something to happen, we need to make it happen. That is what initiative is all about. Take opportunities and run with them. Do not let excuses cause you to miss out on amazing opportunities. See what you want, believe what you want, and make it happen.

With this Taking Initiative workshop, the participants will learn what initiative is, how to take it on, the advantages of it, and when to know one's place. By enrolling in this class, you will be taking the first step in making something positive happen for you. Now that is initiative!

### Taking Initiative - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: What is Initiative?

- Definition
- Benefits, Personal and Professional
- Why People Do Not Take Initiative
- Make Initiative a Priority
- Case Study

#### Module Three: Know Clients

- Be Open Minded
- Be Adaptable
- Making Decisions
- Take Responsibility
- Case Study

#### Module Four: Recognize When You Can Step In

- Know Your Strengths and Skills
- Go the Extra Mile
- Listen Carefully
- Fill in the Gaps
- Case Study

#### Module Five: Recognize When You Can Go Outside the Normal

- Consider Culture and Values Before Acting
- Is It in the Scope of Your Authority?
- Communicate Ideas
- Act on Solutions
- Case Study

#### Module Six: Weighing the Consequences

- Ask Questions
- Risk, Impact, or Cost Analysis
- Is Authorization Necessary?
- When Risks Are Too High
- Case Study

#### Module Seven: Good or Bad

- The Good
- The Bad
- Develop Judgment
- Avoid Acting on Emotion
- Case Study

#### Module Eight: Confidence

- Are You Confident?
- Build Confidence
- Positive Thinking
- Visualization
- Case Study

#### Module Nine: Find Opportunities

- Internal Opportunities
- External Opportunities
- Apply Core Competencies
- What Problems Exist, and Will They Grow?
- Case Study

#### Module Ten: Be Persistent

- Handle Setbacks
- Manage Change
- Modify Ideas When Necessary
- Move Forward
- Case Study

#### Module Eleven: Balance Initiative and Restraint

- Consider the Work Involved in an Idea
- Develop Emotional Intelligence
- Know the Buy-in of Stakeholders
- Do Not Push All Ideas Forward
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
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# WORK-LIFE BALANCE

## TIPS & RESOURCES: FOCUS ON WHAT MATTERS MOST, REDUCE STRESS, BE HAPPIER

Having a balance between work and home life can be a challenge. With this challenge come great rewards when it is done successfully. By balancing a career with home life it will provide benefits in each environment. You will become healthier, mentally and physically, and you will be able to produce more career wise.

With a Work-Life Balance you will be managing your time better. Better time management will benefit all aspects of life; you will be working less and producing more. This workshop will show how to focus on the important things, set accurate and achievable goals, and communicate better with your peers at work and your family at home.

### Work-Life Balance - Course Outline

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Benefits of a Healthy Balance

- Why It's Important
- Increased Productivity
- Improved Mental and Physical Health
- Increased Morale
- Case Study

#### Module Three: Signs of an Imbalance

- Health Risks
- Absenteeism
- Burnout
- Stress
- Case Study

#### Module Four: Employer Resources

- Offer More Employee Control
- Ask Employees for Suggestions
- Employee Assistance Program (EAP)
- Reward Your Staff
- Case Study

#### Module Five: Tips in Time Management

- The Urgent/Important Matrix
- Learn to Say No
- Stay Flexible
- 80/20 Rule
- Case Study

#### Module Six: Goal Setting

- The Three Ps
- SMART Goals
- Visualization
- Prioritizing Your Goals
- Case Study

#### Module Seven: Optional Ways to Work

- Telecommuting
- Job Sharing
- Job Redesign
- Flex Time
- Case Study

#### Module Eight: At Work

- Leave Home Stress at Home
- Break Up Large Tasks
- Delegate
- Set Accurate Goals
- Case Study

#### Module Nine: At Home

- Leave Work Stress at Work
- Turn Your Phone Off
- Take Some Me□ Time
- Maintain Your Boundaries
- Case Study

#### Module Ten: Stress Management

- Exercise
- Eating Well
- Getting Enough Sleep
- Self-Assessment
- Case Study

#### Module Eleven: Working in a Home Office

- Setting Up a Home Office
- Setting Boundaries
- Dealing With Distractions
- Make a Schedule and Stick to It
- Case Study

#### Module Twelve: Wrapping Up

- Words from the Wise
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# CUSTOM & ON-DEMAND TRAINING

## CREATE THE PERFECT TRAINING TO MEET YOUR PRESENT & FUTURE NEEDS

Use this example to create your own training

Turn your knowledge and expertise into workshop you can deliver in person, or online.

Duration: 1 to 5 days, weekly, monthly, quarterly

### Custom/On-demand training – Outline SAMPLE

**Module One: Getting Started**

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

**Module Two: Setting Expectations**

- Defining the Requirements
- Identifying Opportunities for Improvement and Growth
- Setting Verbal Expectations
- Putting Expectations in Writing

**Module Three: Setting Goals**

- Understanding Cascading Goals
- The SMART Way
- Helping Others Set Goals

**Module Four: Assigning Work**

- General Principles
- The Dictatorial Approach
- The Apple-Picking Approach
- The Collaborative Approach

**Module Five: Degrees of Delegation**

- Level 1: Complete Supervision
- Level 2: Partial Supervision
- Level 3: Complete Independence

**Module Six: Implementing Delegation**

- Deciding to Delegate
- To Whom Should You Delegate?
- Providing Instructions
- Monitoring the Results
- Troubleshooting Delegation

**Module Seven: Providing Feedback**

- Characteristics of Good Feedback
- Feedback Delivery Tools
- Informal Feedback
- Formal Feedback

**Module Eight: Managing Your Time**

- The 80/20 Rule
- Prioritizing with the Urgent-Important Matrix
- Using a Productivity Journal
- Using Routines and Rituals to Simplify Your Workday

**Module Nine: Resolving Conflict**

- Using a Conflict Resolution Process
- Maintaining Fairness
- Seeking Help from Within the Team
- Seeking Help from Outside the Team

**Module Ten: Tips for Special Situations**

- What to Do If You've Been Promoted from within the Team
- What to Do If You're Leading a Brand New Team
- What to Do if You're Taking on an Established Team

**Module Eleven: A Survival Guide for the New Supervisor**

- Ask the Right Questions of the Right People
- Go to Gemba
- Keep Learning!

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

# YOUR NEXT STEP

CONTACT US

FOR A FREE NO-STRINGS ATTACHED  
REVIEW OF YOUR NEEDS

Email: [training@OnlineCourses.today](mailto:training@OnlineCourses.today)

OR VISIT US AT

[OnlineCourses.today](https://OnlineCourses.today)