



Indigenous Education & Training Institute

# Course Catalog

1-800-267-2577

## SoftSkills

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## Total Number of Courses

Indigenous Education & Training College currently offers 233 SoftSkills courses.



# Detailed Course Information

## 10-Minute Presentations

### *Course Overview*

Presentations, whether in person or via video interface, remain a primary means of building business relationships and partnerships that will sustain and grow your company.

### *Learning Objectives*

- Know and use essentials of a good presentation
- Choose platforms that enhance your message and reach
- Set goals and timelines for your presentation
- Create engaging narrative from outline through final draft
- Edit and polish your presentation
- Offer and receive peer review
- Develop best practices for future presentations

### *Course Outline*

- |   |   |
|---|---|
| 1. Session One: Course Overview           | Meeting Goals                               |
| Learning Objectives                       | Outlining your Presentation                 |
| Pre-Assignment                            | Presentation Outline                        |
| Pre-Course Assessment                     | Build Your Task List                        |
| 2. Session Two: Presentation Wish List    | 5. Session Five: Drafting Your Presentation |
| Presentations and Relationships           | Checklist for Creation                      |
| What a Presenter Wants                    | Slides and Visuals                          |
| Reflect: Presenter                        | From Outline to Narrative                   |
| What an Audience Wants                    | Creating Visuals                            |
| Reflect: Audience                         | Plan Your Visuals                           |
| The Common Ground                         | 6. Session Six: Polishing Your Presentation |
| Pitching an Idea and Feedback             | Presentation Draft                          |
| 3. Session Three: Choosing the Platform   | Peer Review                                 |
| Real or Virtual?                          | Peer Checklist                              |
| Tools of the Trade                        | Preparing to Present                        |
| Your Personal Toolbox                     | You as Presenter                            |
| Using Your Voice                          | The 'What-If's'                             |
| 4. Session Four: Outlines and Touchstones | Appearing Professional                      |
| Creating Your Presentation                | Doing the Presentation                      |
| Mapping your Presentation                 | 7. Session Seven: Plan for Success          |
| Setting Goals                             | Planning for Success: Introduction          |
| Smart Goals                               | Planning for Success: Examining Your        |
| Measurable Results                        | Presentation                                |
| Setting a Time Limit                      | Presentation Autopsy                        |

Lessons Learned

Action Plan

8. Personal Action Plan  
Starting Point

Where I Want to Go

How I Will Get There

9. Course Summary
10. Recommended Reading List
11. Post-Course Assessment

# Accounting Skills for New Supervisors

## Course Overview

Many of us flinch when we hear terms like depreciation, cash flow, balance sheet, and (worst of all!) budgets. However, these are all important concepts to understand if you're going to succeed in today's business world, particularly as a supervisor. Even better, financial terms are not as scary as they seem!

## Learning Objectives

- Describe the art of finance and financial management
- Explain key financial terms
- Determine your role in company finances
- Find the rules and regulations for your area and industry
- Discuss various types of financial reports, including income statements, balance sheets, cash flow statements, and statements of retained earnings
- Explain how a chart of accounts is created
- Tell the difference between cash and accrual accounting
- Explain single-entry and double-entry bookkeeping
- Differentiate between debits and credits
- Identify and analyze important financial data
- Make financial decisions
- Read annual reports
- Determine whether a company is financially high or low risk
- Recognize different types of organizational financial plans
- Explain what budgets are and how to prepare them
- Recognize what computer skills you need to make you a financial whiz
- Deal with financial situations that impact the people that work for you

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                 | Identifying the Key Players in Your Organization |
| Learning Objectives                           | Governing Organizations                          |
| Pre-Assignment                                |  |
| Pre-Course Assessment                         | 3. Session 3: The Accounting Cycle               |
| 2. Session 2: Getting the Facts Straight      | Methods of Recording Transactions                |
| Starting with the Basics                      | Accounting Periods                               |
| Recording Financial Transactions              | Overview of the Accounting Cycle                 |
| Financial Reports vs. Financial Statements    | Accounting Terms                                 |
| General Accepted Accounting Principles (GAAP) | Case Study: Happy Haircuts                       |
| Getting to Know the Players                   | 4. Session 4: The Key Reports                    |
| The Big Picture                               | What is the Income Statement?                    |
|   | Income Statement Equation                        |

- Income Statement Accounts
- Sample Income Statement
- The Balance Sheet
- Balance Sheet Equation
- Balance Sheet Accounts
- Current vs. Fixed Assets
- Sample Balance Sheet
- The Cash Flow Statement
- Sample Cash Flow Statement
- Statement of Retained Earnings
- 5. Session 5: Keeping Score
  - Understanding the Chart of Accounts
  - Assets
  - Equity
  - Single vs. Double Entry Accounting
  - Double Entry Accounting
  - About Recordkeeping
  - Self-Test
- 6. Session 6: A Review of Financial Terms
  - Match Up!
- 7. Session 7: Understanding Debits and Credits
  - Debits and Credits Demystified
  - Debit and Credit Accounts
  - Working with Debits and Credits
- 8. Session 8: Your Financial Analysis Toolbox
  - Identifying the Relevant Data
  - Analyzing the Data
  - Current Ratio
  - Quick Ratio
  - Net and Gross Profit Margin
  - Caution!
  - Reading Annual Reports
  - Getting Ready
  - Step One: Report by Independent Auditors
  - Step Two: Footnotes
  - Step Three: Financial Statements
  - Step Four: Letters and Analysis
  - Case Study
  - Using Charts and Graphs
  - Column and Bar Charts
  - Bar Chart Example
  - Line Charts
- Pie Charts
- Using Ratios for Decision Making
- Cost-Benefit Analysis
- Return on Investment
- A Final Word
- 9. Session 9: Identifying High and Low Risk Companies
  - General Guidelines
  - Stay Up-To-Date
  - Case Study
- 10. Session 10: The Basics of Budgeting
  - Defining a Budget
  - Where Does the Budget Fit In?
  - The Budgeting Process
  - Step One: Gather the Budget Package
  - Step Two: Lay the Groundwork
  - Step Three: Identify Your Goals and Deliverables
  - Step Four: Gather Your Resources
  - Step Five: Plan Your Work
  - Step Six: Do It!
  - Case Study
  - Task
- 11. Session 11: Working Smarter
  - Computer Survival Skills
  - Internet and E-mails
  - Word Processing
  - Spreadsheet Processing
  - In-House Financial System
  - Choosing Accounting Software
  - Making Connections
- 12. Session 12: People and Numbers
  - Making Connections
- 13. Session 13: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 14. Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment

## Active Listening

### Course Overview

Communication skills are at the heart of everything people do each day — at home, at work, and at play. Active listening encompasses the best of communication, including listening to what others are saying, processing the information, and responding to it, in order to clarify and elicit more information. This course will help you develop and practice your active listening skills.

### Learning Objectives

- Define active listening and its key components
- Identify ways to become a better listener
- Use body language to reflect a positive listening attitude
- Understand the difference between sympathy and empathy, and when each is appropriate
- Create a listening mindset using framing, positive intent, and focus
- Be genuine in your communication
- Understand the communication process
- Ask questions, probe for information, and use paraphrasing techniques
- Build relationships to create an authentic communication experience
- Identify common listening problems and solutions

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview           | Being Genuine                             |
| Learning Objectives                       | Making Connections                        |
| Pre-Assignment                            | 5. Session Five: Encouraging Conversation |
| Pre-Course Assessment                     | What Is Said and What Is Heard            |
| 2. Session Two: Defining Active Listening | The Rumor Mill                            |
| What is Active Listening?                 | Asking Questions                          |
| Identifying Good Listeners                | Probing Techniques                        |
| Tips for Becoming a Better Listener       | Paraphrasing Techniques                   |
| Pre-Assignment Review                     | 6. Session Six: Building Relationships    |
| 3. Session Three: Body Language Basics    | Building Common Ground                    |
| Positive Body Language                    | Getting Connected                         |
| Body Language Activity                    | NLP Techniques                            |
| NLP Tips and Tricks                       | 7. Session Seven: Getting Over Listening  |
| 4. Session Four: Attitude is Everything!  | Roadblocks                                |
| Understanding Sympathy and Empathy        | Problems and Solutions                    |
| Creating the Right Mindset                | 8. Personal Action Plan                   |

- 9. Course Summary
- 10. Recommended Reading List

- 11. Post-Course Assessment

## Adaptive Paradox Leadership

### Course Overview

Leaders today face tensions that do not have simple solutions: stability vs. change, short-term vs. long-term, autonomy vs. control. These paradoxes are not problems to eliminate, but ongoing realities that must be managed. This course introduces the Adaptive Paradox Leadership™ Model (also called the Frame-Hold-Sense-Act-Rebalance) which combines four tools: Paradox Mindset, Tensional Leadership, Theory U™, and Act/Think. Together, they provide a rhythm for leading with both reflection and action, helping leaders stay grounded, agile, and effective in complex environments.

This course equips participants with both the awareness and practical frameworks to lead with clarity, resilience, and confidence in complexity.

### Learning Objectives

- Explain the concept of paradox and why it matters in modern leadership.
- Identify common organizational paradoxes and the risks of one-sided responses.
- Apply Tension Compass™ to map the upsides and downsides of competing demands.
- Practice pausing and sensing (Theory U™) to uncover deeper insights before acting.
- Design small, safe-to-fail leadership experiments using the Act/Think approach.
- Integrate these tools into the Adaptive Paradox Leadership™ Model (Frame-Hold-Sense-Act-Rebalance Cycle™).
- Reflect on personal leadership tendencies (toward reflection or action) and strategies for navigating between them.

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                             | Case Study   |
| Learning Objectives   |  |
| Pre-Assignment  |  |
| Pre-Course Assessment                                       |  |
| 2. Session Two: Introduction to Adaptive Paradox Leadership | 4. Session Four: Tensional Leadership, Part One        |
| Adaptive Paradox Leadership                                 | Understanding Tensions                                 |
| Foundations   | Mapping with the Tension Compass™                      |
| What is VUCA?   | Making Connections                                     |
| Adaptive Paradox Leadership Lenses                          | 5. Session Five: Tensional Leadership, Part Two        |
| Case Study  | Navigating the Tension                                 |
| 3. Session Three: Leading with a Paradox Mindset            | Case Study   |
| Understanding the Paradox Mindset                           | 6. Session Six: Act Like a Leader, Think Like a Leader |
| Paradox Pairs   | Experimenting Forward                                  |
| Making Connections  | Designing a Leadership Experiment                      |
|   | Case Study   |



- |  |  |
|--|--|
| 7. Session Seven: Building the Adaptive<br>Paradox Model<br>Using all the Tools<br>Mapping Personal Tendency<br>Case Study | 9. Course Summary                                |
| 8. Personal Action Plan  | 10. Recommended Reading List                     |
|  | 11. Post-Course Assessment                       |
|  | 12. Pre-and Post-Course Assessment<br>Answer Key |
|  | 13. Assignment Answer Key                        |

# Advanced Project Management

## Course Overview

It is easy to forget the “manager” part of your “project manager” title among the other range of activities you are responsible for. However, your management skills are an important part of your success as a project manager, so it is crucial that you grow both of those skill sets. There are also some advanced project management techniques that you can master to help bring your projects to successful completion.

This course presumes that participants have a thorough understanding of project management, including topics such as preparing a statement of work, setting project goals, scheduling, budgeting, managing project risks, and executing a project.

## Learning Objectives

- Think critically when choosing a project team
- Make the best of an assigned project team
- Help teams move through various stages to become a high-functioning unit
- Maximize productivity at team meetings
- Reward and motivate your team
- Develop and execute a communication plan
- Communicate with sponsors and executives more effectively
- Identify strategies for working with problem team members

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview<br>Learning Objectives<br>Pre-Assignment<br>Pre-Course Assessment                                    | 5. Session Five: Easy Ways to Reward Your Team<br>Top Ten Rewards  |
| 2. Session Two: Choosing the Project Team<br>Choosing the Team<br>Pre-Assignment Review<br>Four Issues to Address with Project Teams | 6. Session Six: Developing a Communication Plan<br>The Five Components<br>Communication Essentials<br>Making Connections |
| 3. Session Three: Building a Winning Team<br>Why is Teamwork Important?<br>The Stages of Team Development                            | 7. Session Seven: Communicating with Sponsors and Executives<br>Communication Excellence<br>Making Connections           |
| 4. Session Four: Managing Team Meetings<br>Starting on the Right Foot<br>Making Committees Work<br>Making Connections                | 8. Session Eight: Dealing with Problem Team Members<br>Developing Understanding  |

When to Walk Away  
When Things Do Not Work  
9. Session Nine: A Personal Action Plan

10. Summary  
11. Recommended Reading List  
12. Post-Course Assessment

# Advanced Skills for the Practical Trainer

## Course Overview

Behind every spectacular training session is a lot of preparation and meticulous attention to detail. The truly skilled trainer can make a program exciting. The learners will have fun while they are learning if the facilitator is able to involve their emotions as well as their minds. You will see the involvement, and you will feel the energy.

To reach this stage as an adult educator is not always easy, but success is not just for the naturally gifted. It is possible for all of us who put effort into our personal growth and development. We want the enormous satisfaction that comes from working with others to help them reach their potential as human beings. This workshop will help you reach that goal.

This course requires that you have a good understanding of basic training principles, including adult learning concepts, Indigenous Education & Training College's experiential learning cycle, training methods, and designing a learning sequence. It is recommended that you complete Indigenous Education & Training College's The Practical Trainer course before taking this course.

### *Learning Objectives*

- Demonstrate your understanding of learning styles and how to accommodate all four learning styles in the classroom
- Apply the key principles of effective communication in a workshop setting
- Use a variety of training techniques to stimulate participation
- Develop a plan and prepare for an effective training session
- Explain the different levels of evaluation and when to use each
- Identify advanced interventions for difficult situations
- Put your skills to work for a team presentation

### *Course Outline*

- |  |   |
|--|---|
| 1. Session One: Course Overview          | 4. Session Four: Competencies for Adult Educators   |
| Learning Objectives                      | Questionnaire                                       |
| Pre-Assignment                           | Making Connections                                  |
| Pre-Course Assessment                    |   |
| 2. Session Two: Preparing to Learn       | 5. Session Five: Accommodating Learning Preferences |
| Pre-Assignment Review                    | The Learning Process                                |
| Individual Reflection                    | Preparing a Plan                                    |
| 3. Session Three: Understanding Learning | Learning Styles                                     |
| The Trainer's Role                       | 6. Session Six: Increasing Your Expertise           |
| Case Study                               | Learning and Motivation                             |
| Personal Skill Identification            | Design Considerations                               |

- Changing Points of View
- 7. Session Seven: Using Existing Materials
  - Customizing Courseware
  - What Does It Take To Customize A Program?
  - Copyright Considerations
  - Over-Plan and Over-Prepare
- 8. Session Eight: Managing the Stress of Training
  - Easy De-Stressing Techniques
  - Building Resilience
  - De-Stressing in Class
- 9. Session Nine: Planning a Workshop
  - Preparing the Essentials
  - Planning for Success
  - Anticipating Challenges
- 10. Session Ten: Preparing Visual Aids
  - Visual Aids
- 11. Session Eleven: Your Role as an Effective Communicator
  - Leading a Discussion
  - Good Discussions
  - Making Connections
- 12. Session Twelve: Questioning as a Training Technique
  - Asking Questions
  - Types of Questions
- 13. Session Thirteen: Kirkpatrick's Levels of Evaluation
  - Level One: Reaction
  - Level Two: Knowledge Evaluation
  - Level Three: Transfer of Learning
  - Level Four: Impact Evaluation
  - Skill Application
- 14. Session Fourteen: On-the-Job Support
  - Designing Effective On-the-Job Support
- 15. Session Fifteen: Dealing with Difficult Situations
  - Potential Problems
  - Successful Solutions
- 16. Session Sixteen: Training in Different Forums
  - In Person or Not?
  - Limitations and Considerations
- 17. Session Seventeen: Webinar
  - What is a Webinar?
  - Webinar Platforms
  - Webinar Planning
  - Webinar Agenda Exercise
- 18. Session Eighteen: Team Teaching
  - What is Team Teaching?
  - Co-Facilitation Inventory
- 19. Session Nineteen: Training Preparation
  - Training Preparation Worksheet
  - Training Evaluation Form
- 20. Personal Action Plan
- 21. Course Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment

## Advanced Writing Skills

### Course Overview

This is a course for those who already are good writers. The course time will be devoted to writing letters of recommendation, of persuasion, of refusal, or of action, that reflect current word usage and up-to-date formats. You can also learn some basics about writing business cases, proposals, and reports.

You must complete Indigenous Education & Training College's *Business Writing That Works* course before taking this course.

### Learning Objectives

- Write clearly, completely, concisely, and correctly
- Improve sentence construction and paragraph development
- Deal with specific business requests
- Thoroughly document sources used while writing

### Course Outline

- |   |                                    |
|---|------------------------------------|
| 1. Session One: Course Overview                 | Types of Letters                   |
| Learning Objectives                             | Keeping it Real                    |
| Pre-Assignment                                  | 5. Session Five: Online Business   |
| Pre-Course Assessment                           | Communication                      |
| 2. Session Two: The Cs of Writing               | Blogging for Business              |
| Writing Clearly                                 | Making Connections                 |
| Writing Concisely                               | Connecting Through Social Media    |
| Making Connections                              | Documentation                      |
| Writing Correctly                               | 6. Session Six: Editing Techniques |
| Choosing Sources Activity                       | Pre-Assignment Review              |
| 3. Session Three: Writing Mechanics             | 7. Personal Action Plan            |
| Building Sentences                              | 8. Course Summary                  |
| Proper Paragraphs                               | 9. Recommended Reading List        |
| More on Paragraphs                              | 10. Post-Course Assessment         |
| Making Connections                              |                                    |
| 4. Session Four: Dealing with Specific Requests |                                    |

## AI and Critical Thinking

### *Course Overview*

This course provides a comprehensive overview of artificial intelligence (AI), focusing on its fundamentals, applications, and ethical considerations. Students will learn to describe different types of AI and their common applications in everyday life. Key ethical issues such as fairness, accountability, transparency, and bias will be explored through real-world examples. The course emphasizes critical thinking skills, enabling students to evaluate AI claims and differentiate between hype and reality. Students will gain an understanding of how machine learning works, including commonly used algorithms and current AI technologies across various sectors.

The course also addresses the ethical implications of AI, covering data privacy, security, and the impact on personal freedoms. Students will analyze AI applications in key areas such as healthcare, finance, and law, evaluating both successful and problematic case studies to develop practical AI solutions. By the end of the course, students will be able to critically assess the effectiveness and challenges of various AI implementations, understand ethical considerations and biases, and propose strategies for responsible and ethical AI deployment.

### *Learning Objectives*

- Describe the fundamentals of AI, including different types and common applications in everyday life.
- Understand and discuss key ethical issues in AI, such as fairness, accountability, transparency, and bias, with the help of real-world examples.
- Apply critical thinking principles to evaluate claims about AI, differentiating between hype and reality through practical exercises.
- Explain how machine learning works, identify commonly used algorithms in AI, and recognize AI technologies currently in use across various sectors.
- Discuss the ethical implications of AI, including data privacy, security, and its impact on personal freedoms, and critically assess how to balance these issues with technological innovation.
- Analyze the application of AI in key areas such as healthcare, finance, and law, evaluate case studies of both successful and problematic AI implementations, and develop AI solutions for real-world problems.
- Critically evaluate the effectiveness and challenges of various AI implementations, identifying key factors that contribute to successful or problematic outcomes.
- Gain an understanding of the ethical considerations and potential biases in AI systems, particularly in high-impact areas such as healthcare, finance, and law enforcement.

- Propose best practices and strategies for developing and deploying AI systems responsibly and ethically.

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview   | AI in Various Industries: Opportunities and Challenges                      |
| Learning Objectives   | Case Study: AI Implementation in Supply Chain Management by DHL             |
| Pre-Assignment  | AI Implementations  |
| Pre-Course Assessment   | 7. Session Seven: Philosophical and Future Aspects of AI                    |
| 2. Session Two: Introduction to AI                                      | AI and Consciousness: Philosophical Debates                                 |
| Artificial Intelligence   | The Potential for Artificial General Intelligence (AGI)                     |
| Ethics and Social Implications of AI                                    | The Future Impact of AI on Society  |
| Case Study: Real-World Example of AI Bias                               | Philosophical and Future Aspects of AI                                      |
| 3. Session Three: Critical Thinking with AI                             | 8. Session Eight: AI Guidelines and Policies                                |
| Critical Thinking   | Developing Draft AI Guidelines and Policies: A Collaborative Starting Point |
| Evaluating an AI News Article or Product Claim                          | Defining Core Principles for AI Ethics Guidelines                           |
| 4. Session Four: Machine Learning and Algorithms                        | 9. Session Nine: Critical Evaluation of AI Systems                          |
| How Machine Learning Works  | Understanding AI Robustness, Reliability, and Limitations                   |
| Overview of Algorithms Commonly Used in AI                              | Reliability in AI Systems: Importance and Maintenance                       |
| Activity: The Practical Applications and Challenges of Machine Learning | Areas Where AI Can be Helpful in Critical Thinking                          |
| 5. Session Five: Advanced Ethics and AI Safety                          | 10. Personal Action Plan  |
| Detailed Discussion on Data Privacy and AI Security                     | 11. Course Summary  |
| The Role of AI in Surveillance and Personal Freedoms                    | 12. Recommended Reading List  |
| Activity: Balancing Innovation and Ethical Concerns                     | 13. Post-Course Assessment  |
| 6. Session Six: Case Studies of AI Implementations                      |   |



## AI and Problem-Solving

### Course Overview

Balancing the use of data with human problem solving requires a nuanced approach that recognizes the strengths and limitations of both. By integrating data with human judgment, fostering cross-functional collaboration, and building a data-literate culture, organizations can solve problems in a more informed, ethical, and sustainable way. This course introduces Artificial Intelligence (AI) and its role in solving real-world problems. Participants will explore key AI concepts, tools, and technologies such as machine learning, data-driven decision-making, and popular AI platforms. The course covers practical aspects such as building and integrating AI models, ethical considerations such as bias and privacy, and the future impact of AI on industries and employment.

### Learning Objectives

- Understand the fundamentals of AI and its capacity for solving problems.
- Use specific AI tools and technologies that facilitate problem-solving.
- Explain how machine learning models are developed and used in AI solutions.
- Implement AI solutions in real-world problem-solving scenarios.
- Discuss the ethical implications of using AI in problem-solving.
- Speculate on future trends and the evolving role of AI in solving complex problems.
- Apply the knowledge and skills that are learned to a real or simulated problem.

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                        | Techniques for Data Collection, Cleaning, and Preparation      |
| Learning Objectives                                    | Visualization and Interpretation of Data Outputs               |
| Pre-Assignment   |  |
| Pre-Course Assessment                                  |  |
| 2. Session Two: Introduction to AI and Problem-Solving | AI Data Strategy Case Study Analysis                           |
| Overview   | 5. Session Five: Machine Learning Models in Problem-Solving    |
| Key Concepts of Artificial Intelligence                | Overview   |
| Types of AI technologies Relevant to Problem-Solving   | Machine Learning Method Discussion and Application Scenarios   |
| Identifying Problems Suitable for AI Solutions         | 6. Session Six: Implementing AI Solutions                      |
| 3. Session Three: AI Tools and Technologies            | Integration of AI into Existing Workflows and Systems          |
| Popular AI Platforms and Tools                         | Project Management Strategies for AI in Projects               |
| AI Implementation Case Studies                         | AI Integration Strategy Case Study                             |
| Getting Started with a Simple AI Tool or Platform      | 7. Session Seven: Ethical Considerations in AI Problem-solving |
| 4. Session Four: Data-Driven Problem Solving           |  |

- Bias, Fairness and privacy in AI solutions
- Case Study: Moneyball Strategies
- Balancing Data and Human
- Decision-Making in an Organization
- Necessary Human Intervention
- 8. Session Eight: Future of AI in  
Problem-Solving
- Emerging AI Technologies and Their  
Potential Applications and Effects
- Preparing for an AI-Driven Future
- 9. Session Nine: Preparing for an AI-Driven  
Future
- Preparing for an AI-Driven Future
- How Can I Ethically Engage with AI?
- 10. Personal Action Plan
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

## AI and Project Management

### *Course Overview*

Artificial Intelligence (AI) is transforming project management by automating tasks, optimizing workflows, and improving decision-making. This course explores how AI-powered tools assist with scheduling, risk management, resource allocation, and collaboration. Participants will learn how to integrate AI solutions into their project workflows, address ethical considerations, and balance AI-driven insights with human expertise. Through hands-on activities and discussions, project managers will gain the skills to effectively leverage AI while maintaining strategic control over their projects.

### *Learning Objectives*

- Explain how AI can enhance planning, scheduling, risk management, and communication in projects.
- Demonstrate how AI-powered automation can improve scheduling efficiency and prevent delays.
- Identify potential project risks and utilize predictive analytics to mitigate challenges.
- Explain how AI-driven tools enhance team collaboration and decision-making.
- Implement AI-based automation to streamline repetitive tasks and improve efficiency.
- Discuss ethical considerations, biases, and data security issues in AI-powered project management.

## *Course Outline*

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Understanding AI in Project Management
  - The Role of Ai
  - Using AI to Solve Challenges
3. Session Three: AI for Planning and Scheduling
  - How AI Can Help
  - AI-Powered Scheduling
4. Session Four: AI and Risk Management
  - Predictive Analysis and Early Warnings
  - Risk Scenario Analysis
5. Session Five: Communications and Collaboration
  - AI-Powered Chatbots and Virtual Assistants
  - Enhancing Team Collaboration
  - Using Chatbots and Virtual Assistants
6. Session Six: Data Analysis and Decision-Making
  - Data Processing and Insights
  - AI-Driven Decision Support Systems
  - Real Time Data Challenge
7. Session Seven: AI and Task Automation
  - Automation and Workflow Optimization
8. Session Eight: Understanding AI Limitations
  - Lack of Human Intuition and Judgement
  - Ethical Implications and Biases in AI Algorithms
  - Human Decision-Making
9. Session Nine: Addressing Data Challenges
  - AI Requires Large Volumes of Quality Data
  - Challenges with Data Privacy and Security
  - Limitations in Handling Unexpected Changes

Integration Challenges in AI

Impact of Data Quality on AI

10. Session Ten: Case Studies and Real-world Examples

Successfully Implementing AI

11. Session Eleven: Future of AI in Project Management

Emerging AI Trends in Project Management

Preparing for an AI-Driven Future

12. Session Twelve: Using AI tools

Introduction to AI in Project Management

AI Tool Applications

13. Personal Action Plan

14. Course Summary

15. Recommended Reading List

16. Post-Course Assessment

# An Environmental Audit Primer

## Course Overview

This course provides participants with the knowledge and skills to conduct internal environmental audits. Practical, proven techniques for planning, conducting, and reporting on internal environmental audits will be introduced. Role-plays and case studies based on actual audits will be used to reinforce the concepts and provide participants with practice in applying the principles to situations typically encountered during internal auditing.

## Learning Objectives

- Explain the different types of audits and the levels of auditing available
- Know the qualifications of auditors and the preparation that they need to conduct an audit
- Understand the basics steps in an audit and how auditors gather information and evidence
- Develop open-ended questions which will help in audit interviews
- Understand the essential aspects of an audit checklist
- Develop an audit checklist based on EMS procedures
- Prepare for an audit
- Use an Internal Audit Noncompliance and Corrective Action Report to record non-conformances
- Understand the corrective action process and its importance in closing out non-conformances
- Gain experience in conducting an audit closing meeting

## Course Outline

- |                               |  |
|-------------------------------|--|
| 1. Session 1: Course Overview | Identifying, Collecting and Preserving     |
| Learning Objectives           | Evidence                                   |
| Pre-Assignment                | Listening Techniques                       |
| Pre-Course Assessment         | Questioning Techniques                     |
| 2. Session 2: Auditing        | Questioning Exercise                       |
| Overview                      | 5. Session 5: Audit Checklist              |
| Types of Audits               | Developing an Audit Checklist              |
| 3. Session 3: Internal Audit  | 6. Session 6: Conducting an Audit          |
| Internal Audit                | Conducting the Audit                       |
| Auditors                      | 7. Session 7: Noncompliance and Corrective |
| Preparing and Conducting      | Action                                     |
| 4. Session 4: The Audit       | Recording Noncompliance                    |
| Basics of an Audit            | Taking Corrective Action                   |

8. Session 8: Audit Closing  
Closing Meeting
9. A Personal Action Plan  
Starting Point

- Where I Want to Go  
How I Will Get There
10. Summary
11. Recommended Reading List
12. Post-Course Assessment

# Anger Management: Understanding Anger

## Course Overview

Anger is a universal experience. Dogs get angry, bees get angry, and so do humans. You don't have to be a psychologist to know that managing anger productively is something few individuals, organizations, and societies do well. Yet research tells us that those who do manage their anger at work are much more successful than those who don't.

The co-worker who can productively confront his teammate about his negative attitude increases his team's chance of success as well as minimizes destructive conflicts. The customer service agent who can defuse the angry customer not only keeps her customers loyal but makes her own day less troublesome. This course is designed to help give you and your organization that edge.

## Learning Objectives

- Recognize how anger affects your body, your mind, and your behavior
- Use the five-step method to break old patterns and replace them with a model for assertive anger
- Use an anger log to identify your hot buttons and triggers
- Control your own emotions when faced with other peoples' anger
- Identify ways to help other people safely manage some of their repressed or expressed anger
- Communicate with others in a constructive, assertive manner

## Course Outline

- |                                  |   |
|----------------------------------|---|
| 1. Session 1: Course Overview    | Triggers  |
| Learning Objectives              | Using the Anger Log                               |
| Pre-Assignment                   | Anger Log Example                                 |
| Pre-Course Assessment            | Considering Our Anger                             |
| 2. Session 2: Definitions        | 5. Session 5: How Does Anger Affect Our Thinking? |
| About Anger                      | Is Anger the Best Response?                       |
| The Five Dimensions of Anger     | Distorted Thinking                                |
| Making Connections               | Magnifying  |
| Pre-Assignment Review            | Destructive Labeling                              |
| 3. Session 3: Costs and Pay-Offs | Imperative Thinking                               |
| What it Means                    | Mind Reading                                      |
| What Are Your Anger Pay-Offs?    | Conclusion  |
| 4. Session 4: The Anger Process  | 6. Session 6: Understanding Behavior Types        |
| What is the Process?             | Introduction                                      |
| Reactions to Anger               | Manipulative or Passive-Aggressive Behavior       |
| Understanding Trigger Thoughts   |   |
| Personal Hot Buttons             |   |



- Passive Behavior
- Assertive Behavior
- 7. Session 7: Managing Anger
  - Coping Strategies
  - Sanctuary
  - Taking Care of Yourself
  - Relaxation Techniques
- 8. Session 8: Communication Tips and Tricks
  - Asking Good Questions
  - Closed Questions
  - Open Questions
  - Using Questions Effectively
  - Other Types of Open-Ended Questions
- Active Listening Skills
- Responding to Feelings
- Tips for Becoming a Better Listener
- I Messages
- The Assertiveness Formula
- Making Connections
- 9. Session 9: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

# Appreciative Inquiry

## Course Overview

Do you love those moments of exception, when everything seems to have come together and things are working beautifully? Would you like to create an environment where those rare, extraordinary moments become the norm? This is possible through Appreciative Inquiry: a method for implementing change that is rooted in positive vision, sharing stories of things that work well, and leveraging people's strengths and the power of co-creation to initiate lasting, powerful changes. Appreciative Inquiry invites and records data on what is working well from the perspective of those working and creating within the organization. This data is then used to invite more expansive thinking and creation to facilitate and guide organizational growth and change, led by people who care and are committed to the positive outcome.

## Learning Objectives

- Recognize and work with the fundamentals of Appreciative Inquiry
- Describe the 4-D model of Appreciative Inquiry: discovery, dreaming, design, and destiny
- Work through a simple Appreciative Inquiry process
- Create thoughtful, meaningful questions for your own Appreciative Inquiry initiative
- Help organizations review what is important, what they can become, and how they can get there

## Course Outline

- |   |                                      |
|---|--------------------------------------|
| 1. Session One: Course Overview               | 4. Session Four: The 4-D Model       |
| Learning Objectives                           | Introduction to the Model            |
| Pre-Assignment                                | Using the 4-D Model                  |
| Pre-Course Assessment                         | Overview of the 4-D Model            |
| 2. Session Two: Defining Appreciative Inquiry | Discovery of What Is                 |
| What Is Appreciative Inquiry?                 | Putting It Into Practice             |
| Pre-Assignment Review                         | Dream what Could Be                  |
| How is Appreciative Inquiry Different?        | Designing The Ideal                  |
| Getting Started                               | Destiny                              |
| 3. Session Three: Principles of Success       | 5. Session Five: the Interview Guide |
| Five Key Principles                           | The Questions                        |
| Teaching Positivity                           | Creating the Guide                   |
| Making Connections                            | The Summary                          |
| Measuring Tangible Success                    | Making Connections                   |
| Making Connections                            | 6. Personal Action Plan              |
| Setting the Interview Groundwork              | 7. Course Summary                    |

8. Recommended Reading List

9. Post-Course Assessment

## Balanced Scorecard Basics

### Course Overview

Over the past several decades, organizations have come to realize that success can be measured in other ways besides dollars and cents. Intangible assets (such as a company's reputation, the knowledge base created by their employees, and training initiatives) can make up a huge portion of a company's wealth.

### Learning Objectives

- Define what the balanced scorecard is
- Identify the benefits of the scorecard
- Create a vision statement for the balanced scorecard
- Understand what corporate values, mission statements, and vision statements are and how they tie into the balanced scorecard process
- Determine if the balanced scorecard is right for your organization
- Describe the key elements of the balanced scorecard process
- Identify a strategy map, tactical action plan, and balanced scorecard
- Identify the components of supporting balanced scorecard plans
- Understand what processes you will need to support the balanced scorecard
- Identify the members of different balanced scorecard teams

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview               | Building Core Plans: Training Plans          |
| Learning Objectives                           | A Checklist of Processes                     |
| Pre-Assignment                                | Case Study                                   |
| Pre-Course Assessment                         | 6. Session Six: Overview of the Balanced     |
| 2. Session Two: Understanding the Balanced    | Scorecard Process                            |
| Scorecard (BSC)                               | The Big Picture                              |
| Where Did the Balanced Scorecard Come         | Building Balanced Scorecard Teams            |
| From?   | Building BSC Brainstorming                   |
| What is the Balanced Scorecard?               | Sample Strategy Map                          |
| 3. Session Three: Creating a Vision Statement | Sample Balanced Scorecard                    |
| Why We are Doing What We are Doing            | Sample Tactical Action Plan                  |
| Making a Statement                            | Determining KPIs                             |
| 4. Session Four: Understanding                | 7. Session Seven: Creating a Smooth Path for |
| Organizational Mission, Vision, and Values    | Implementation                               |
| The Building Blocks for Your Balanced         | Creating a Smooth Path for Implementation    |
| Scorecard                                     | Our Top 10 Pitfalls                          |
| Analyzing Sample Statements                   | 8. Session Eight: Balanced Scorecard         |
| 5. Session Five: Plans and Processes to Build | Application                                  |
| Building Core Plans: Project Plans            | BSC and Your Organization                    |
| Building Core Plans: Communication Plans      | 9. Personal Action Plan                      |

Starting Point  
Where I Want to Go  
How I Will Get There

10. Course Summary  
11. Recommended Reading List  
12. Post Course Assessment

# Basic Business Management: Boot Camp for Business Owners

## Course Overview

Owning a business requires a vision balanced with attention to detail. You need to be a generalist who understands the multiple aspects of running a business, as well as the ability to step back and see the big picture and to reach into the future.

The business environment is a complex place to be. Whether you wish to work as a consultant or freelancer, establish a corporation, or set up an operation that meets a need for very particular type of customer, there is a tremendous amount of information that you need to know and to apply.

This course provides essential learning for new business owners, whether the business is just in the idea stage or you have already begun and need to fill in the gaps.

## Learning Objectives

- Apply the best methods for creating, leading, and managing your own business
- Establish an organizational framework through operations, finance, and leadership
- Set up an effective and efficient system for hiring, retaining, and succession planning
- Start researching and designing your strategic plan
- Describe the essential elements of marketing, sales, and your company brand
- Apply financial and accounting terms correctly

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview                         | Growth Phase One                                    |
| Learning Objectives                                   | Growth Phase Two                                    |
| Pre-Assignment  | Putting the Pieces Together                         |
| Pre-Course Assessment                                 | Looking at the Options                              |
| 2. Session 2: Who Are You and What Are You About?     | Geographic Structure                                |
| What is Our Business?                                 | Divisional Structure                                |
| Making Connections                                    | Matrix Structure                                    |
| Pre-Assignment Review                                 | Summary   |
| The Owner's Role                                      | Making Connections                                  |
| Ingredients for Success                               | Differences for Corporations                        |
| The Business Owner                                    | Choosing Board Members                              |
| The Entrepreneur                                      | Board Issues  |
| The Freelancer  | The Role of Shareholders                            |
| Words of Wisdom                                       | The Big Picture                                     |
| Keeping Things Moving                                 | Words of Wisdom                                     |
| 3. Session 3: Designing Your Organizational Structure | Current Thinking                                    |
| Bringing the Idea to Life                             | Making Connections                                  |
| Getting Started                                       | 4. Session 4: Introduction to Operations Management |
|   | Defining Operations Management                      |

- What Does It All Mean?
- Envisioning the Process
- Introduction to Types of Operations
- Types of Operations
- Practical Application
- 5. Session 5: Understanding Financial Terms
  - Finance
  - Recording Financial Transactions
  - General Accepted Accounting Principles (GAAP)
  - The Income Statement
  - Income Statement Equation
  - Sample Income Statement
  - The Balance Sheet
  - Balance Sheet Equation
  - More About Balance Sheets
  - Current vs. Fixed Assets
  - Cash Flow Statement
  - Statement of Retained Earnings
- 6. Session 6: Getting the Right People in Place
  - Six Essential Steps of Hiring
  - More about Orientation
  - More about Onboarding
  - Making Connections
- 7. Session 7: Getting Your Product Together
  - Inventory Management
  - Types of Inventory
  - More About Inventory
  - Understanding the Value Chain
  - Making Connections
  - Outsourcing Options
  - Quality Control
  - Quality Control Philosophy
- 8. Session 8: Building a Corporate Brand
  - Your Brand
  - Example: Acme Widgets Inc.
  - Brand Names and Slogans
  - Do's and Don'ts
  - Developing a Slogan
  - How People Will See Your Images
  - Choosing a Color
- Color Spectrum Two
- Fonts
- Sans Serif Fonts
- Specialty Fonts
- Font Considerations
- Simple Pictorial Mark
- Letterform
- Wordmark
- Emblems
- Working It Out
- 9. Session 9: Marketing Your Product
  - About the Marketing Process
  - Cycle Overview
  - Stage One: Consumer and Market Analysis
  - What Do They Need?
  - Who is Buying Our Product? Who is Using Our Product?
  - What is the Buying Process?
  - How Can I Leverage Segmentation?
  - Segmentation Case Study
  - Stage Two: Analyzing the Competition and Yourself
  - SWOT Analysis
  - Next Steps
  - Stage Three: Analyzing Distribution Channels
  - Making Connections
  - Stage Four: Creating a Marketing Plan
  - Price
  - Promotion
  - Packaging
  - Making Connections
  - The Final Stages: Implement, Evaluate, Review, Revise
  - Leveraging Social Media
- 10. Session 10: Selling Your Product
  - Building Your Sales Force
  - The Sales Cycle
  - Initiate
  - Build

- Manage
- Optimize
- 11. Session 11: Planning for the Future
  - Introduction to Strategic Planning
  - Identifying Your Stakeholders
  - Taking the Right Approach
  - Making Connections
  - The Strategic Plan Pyramid
- 12. Session 12: Goal Setting and Goal
  - Getting
  - Setting Achievable Goals: Identifying Outcomes
  - The Four Perspectives
  - Customizing the Perspectives
  - Timeline for Your Plan
  - Goals with SPIRIT
  - Getting Into It
- 13. Session 13: Succession Planning 101
  - What is Succession Planning?
  - Replacing vs. Succeeding
  - Defining Succession Planning
- 14. Session 14: Managing Your Money
  - What is a Budget?
  - Test All Assumptions
  - How Was Last Year?
  - How's The Marketplace Doing?
  - What's It Costing?
  - Managing Your Budget
  - Know Your Accruals
  - Getting it Right
- 15. Session 15: Ethics 101
  - Are You Ready?
  - Sample Codes of Ethics
  - Rotary Four-Way Test
  - Minnesota Principles
  - Asimov's Three Laws of Robotics
  - Your Code of Ethics
- 16. Session 16: Building a Strong Customer Care Team
- The Pillars of Success
- The Critical Elements of Customer Service
- Making Connections
- The Remaining Elements
- Critical Element Three: Given Life by the Employees
- Critical Element Four: Be a Problem Solver
- A Problem Solving Process
- Critical Element Five: Measure It
- Critical Element Six: Reinforce It
- Developing and Maintaining Relationships
- 17. Session 17: Training Employees for Success
  - Why Continuous Learning?
  - Factors for Learning Success
  - Getting Motivated for Training
  - Steps in the Learning Process
  - Making Connections
- 18. Session 18: Leadership Essentials
  - Leading and Managing
  - Leadership Styles
  - Making Connections
  - Applying the Styles
  - The Cycle of Styles
  - Managing Performance
  - Making Connections
- 19. Session 19: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 20. Summary
- 21. Recommended Reading List
- 22. Post-Course Assessment



# Becoming a Better Learner

## Course Overview

There was a time when what you learned in school before entering the workforce would be all you needed to know for the rest of your career. That is no longer the case, as today skills can become outdated very quickly. The rapid evolution of workplace technologies and best practices means you need to keep your skills current. You must truly be a life-long learner and can no longer rely on what you already know.

## Learning Objectives

- Understand what it means to learn and become a life-long learner
- Know what a mindset for learning looks like and how to adopt one
- Set realistic goals
- Understand what your network is and why expanding it is important
- Know how to ask questions and why that is important
- Become accountable for your goals and take responsibility
- Know how to accelerate your learning

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                        | How Do You Take Notes?                                 |
| Learning Objectives                                    | The Cornell Note Taking Method                         |
| Pre-Assignment   | The Mapping Note Taking Method                         |
| Pre-Course Assessment                                  | The Outlining Note Taking Method                       |
| 2. Session Two: Adopting the Best Mindset for Learning | The Charting Note Taking Method                        |
| What Does it Mean to Learn?                            | The Sentence Note Taking Method                        |
| But What Does That Mean in a Practical Sense?          | Extra Information                                      |
| What Does It Mean to Learn?                            | 4. Session Four: Setting and Managing Goals            |
| Continuing to Learn                                    | How Do Goals Play into Learning?                       |
| Adopting the Right Mindset                             | SMART Goals  |
| Mindset in Practice                                    | Setting Goals Activity                                 |
| Mindset Reflections                                    | 5. Session Five: Expanding Your Network                |
| Practicing Mindset and Learning?                       | Learning About Your Network                            |
| Where to Start   | Asking Questions                                       |
| 3. Session Three: Taking Better Notes                  | 6. Session Six: The Whole Picture                      |
| Five Methods of Note Taking                            | Becoming Accountable                                   |
| The Cornell Method                                     | Embracing Responsibility                               |
| The Mapping Method                                     | Embracing Technology                                   |
| The Outlining Method                                   | 7. Session Seven: Mind and Body                        |
| The Charting Method                                    | Mind and Body Working Together                         |
| The Sentence Method                                    | 8. Session Eight: How You Can Accelerate Your Learning |
|  | Tips to Accelerate Your Learning                       |

9. Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
10. Course Summary
11. Recommended Reading List
12. Post-Course Assessment

## Becoming a Progressive Employer

### Course Overview

Many people like to think of themselves as progressive in some fashion, but is this usually the case? Employers can be considered progressive for numerous reasons, from the way they treat their staff to their approach to technology. This one-day course will point the way towards being a progressive employer for those who wish to be on the forefront of employee relations and develop an innovative stance on business.

### Learning Objectives

- Understand what being progressive means
- See the process for getting from the status quo to being progressive
- Develop or enhance a progressive mindset
- Truly examine what it means to be progressive
- Develop innovative ideas
- Understand the importance of a succession plan

### Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview             | Creativity and Innovation in Business    |
| Learning Objectives                       | 7. Session 7: Workers Matter             |
| Pre-Assignment                            | Workers Matter                           |
| Pre-Course Assessment                     | Avenues to Consider: Compensation        |
| 2. Session 2: What Does Progressive Mean? | Avenues to Consider: Employee Well-being |
| A Definition                              | Avenues to Consider: Flexible Working    |
| Examples of Progressive Companies         | Arrangements                             |
| Case Study: Eyes on the Skies             | Avenues to Consider: Training            |
| Brainstorming                             | Avenues to Consider: Communication       |
| 3. Session 3: Getting From Here to There  | Avenues to Consider: Social Media Policy |
| Gap Analysis                              | Avenues to Consider: Work and Play       |
| Analyzing                                 | Pen to Paper                             |
| Process Overview                          | 8. Session 8: As the Curtain Comes Down  |
| 4. Session 4: Progressive Mindset         | Succession Planning                      |
| Being Open to Progress                    | Key Ingredients of a Successful Plan     |
| A Progressive Mindset                     | Plan Production                          |
| Progressive Thinkers                      | 9. A Personal Action Plan                |
| 5. Session 5: The Good and Not So Good    | Starting Point                           |
| Pros and Cons                             | Where I Want to Go                       |
| 6. Session 6: It Can Come From Within     | How I Will Get There                     |
| Thinking About it                         | 10. Course Summary                       |
| Finding Examples                          | 11. Recommended Reading List             |
| Going it Alone                            | 12. Post-Course Assessment               |

## Becoming Management Material

### Course Overview

At its core, leadership means setting goals, lighting a path, and persuading others to follow. By accepting the challenge to lead, you come to realize that the only limits are those you place on yourself.

### Learning Objectives

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

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview              | You Can Create New Mental Models!          |
| Learning Objectives                          | The Ladder of Inference                    |
| Pre-Assignment                               | Reflection: Using Your Own Experiences as  |
| Pre-Course Assessment                        | a Resource                                 |
| 2. Session Two: About the Learning           | 5. Session Five: Achieving a Shared Vision |
| Organization                                 | What Is a Shared Vision?                   |
| What Is a Learning Organization?             | 6. Session Six: Team Learning              |
| Are You a Lifelong Learner?                  | Team Learning                              |
| Scoring                                      | Team Learning Diagram                      |
| 3. Session Three: Achieving Personal Mastery | Protocols for Skillful Discussion          |
| What Is Personal Mastery?                    | Preparing the Ground for Skillful          |
| Your Personal Vision                         | Discussion                                 |
| Our Personal Vision and Our Values           | 7. Session Seven: Systems Thinking         |
| Step One: Identify Your Values               | Systems Thinking                           |
| Step Two: Define Your Values                 | 8. Session Eight: Understanding Leadership |
| Step Three: Put It All Together              | About Leadership                           |
| 4. Session Four: Analyzing Our Mental Models | Think About Your Leadership Style          |
| Our Mental Models                            | Your Comfort Zone                          |
| Mental Models in the Workplace               | Understanding Your Comfort Zone            |
| Strategies for Working with Mental Models    | Managing Performance                       |

- Servant Leadership
- Onboarding and Orientation
- 9. Session Nine: Five Practices
  - Practices One: Challenge the Process
  - Practices Two: Inspire a Shared Vision
  - Practices Three: Enable Others to Act
  - Image Identification
  - Practice Four: Model the Way
  - Practice Five: Encourage the Heart
  - Practices in Practice
- 10. Session Ten: Building Trust
  - The Cycle of Trust and Performance
  - Trust Exercise
- 11. Session Eleven: Managing Change
  - About Change
  - Making Connections
  - Key Factors in Successful Change
  - A Step-by-Step Plan for Change
  - Case Study: Getting More From the Last Hour
- 12. Session Twelve: The Four Room Apartment
  - The Four Room Apartment
- 13. Session Thirteen: Time Management Tips and Tricks
  - Getting Things in Order
  - Mastering E-mail
  - Time Management Tips
  - A Planning Checklist
  - Putting Plans into Action with Scheduling Aids
  - Organizing Your Work Area and Your Paperwork
- 14. Session Fourteen: Managers vs. Leaders
  - Managers vs. Leaders
- 15. Session Fifteen: Learning and Thinking Styles
  - Learning Styles
  - Learning Styles Exercise
  - Thinking Styles
  - Learning and Thinking Styles Exercise
- 16. Session Sixteen: Influence Strategies
  - Common Influence Strategies
  - Cialdini's Six Strategies
- 17. Session Seventeen: Managing Relationships
  - The Relationship Cycle
  - Coaching Through Conflict
  - Preparing for Conflict
  - Managing Stress
  - The Positive Effect
  - Fifteen Steps for Dealing with Upset People
  - Five Tips for Dealing with Difficult People
  - Six Steps for Dealing with Angry People
- 18. Session Eighteen: A Simple Problem-Solving Process
  - Systematic Problem Solving
  - Personal Problems
- 19. Session Nineteen: Strategic Planning
  - SWOT Analysis
  - Individual Analyses
- 20. Session Twenty: Doing Delegation Right
  - What Is Delegation?
  - Definitions
  - Levels of Delegation
  - Breaking Down the Model
  - Delegation Case Study
- 21. Session Twenty-One: Criteria for Useful Feedback
  - Giving Constructive Feedback
- 22. Session Twenty-Two: Feedback Techniques
  - Feedback Techniques
  - Case Study
- 23. Session Twenty-Three: Mastering Your Body Language
  - Mastering Your Body Language
- 24. Session Twenty-Four: Meeting Management
  - Preparing for Meetings
  - Reading the Reports
  - During the Meeting
  - Managing Meetings
  - Presentation Tips
- 25. Session Twenty-Five: Pumping up a Presentation

Pumping up a Presentation	Where I Want to Go
26. Session Twenty-Six: Personal Development	How I Will Get There
Personal Development Plan	28. Course Summary
27. Personal Action Plan	29. Recommended Reading List
Starting Point	30. Post-Course Assessment

## Being a Team Player

### Course Overview

Teamwork is essential in any successful enterprise, and to have effective teams, an organization must be comprised of individuals who pride themselves on being great team players. Many of us consider ourselves to be team players, but are we really? Do we know what that takes; and what managers consider to be the qualities that make a person a team player, or that make a good team player a 'great' team player? Everyone brings their own skills and strengths to the table; understanding how to use those skills within the context of a team is vital to help an organization succeed.

### Learning Objectives

- Understand the definition of a team player and a non-team player
- Know the difference between a team player and a non-team player
- Learn the qualities possessed by a team player
- Determine what type of team player you are and how that functions in your workplace
- Know and understand what it takes to be a team player
- Discover the different types of teams that exist within a company
- Learn what working together as a team looks like
- Learn the different types of workplace teams and what types of teams successful organizations need
- Develop strategies to improve teamwork

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | Actions Speak Louder than Words                         |
| Learning Objectives                        | How to Be a Good Team Player                            |
| Pre-Assignment                             | Are You a Good Team Player?                             |
| Pre-Course Assessment                      | Take 1  |
| 2. Session Two: Being a Team Player        | Be Prepared for the 'Teamwork' Question in an Interview |
| What Is a Team Player?                     | The Interview   |
| Who Is a Team Player?                      |   |
| Characteristics of a Team Player           | 4. Session Four: Teamwork                               |
| 3. Session Three: Being a Good Team Player | Teamwork Definition                                     |
| Types of Workplace Teams                   | One Bad Apple ...                                       |
| A Closer Look                              | 6. Session Six: Strategies to Improve Teamwork          |
| Five Types of Workplace Teams              | 20 Strategies   |
| Organizations Need                         | Bringing it All Together                                |
| 5. Session Five: Why Teamwork Fails        | 7. Personal Action Plan                                 |
| Five Reasons                               | 8. Course Summary                                       |
| Employee Recognition                       | 9. Recommended Reading List                             |
| Types of Recognition                       | 10. Post Course Assessment                              |
| Tips for Recognizing Employees             |   |





## Beyond Workplace Politics: Using Social and Emotional Competencies

### Course Overview

Workplace politics encompasses the power and authority processes and behaviors that are at work in a particular workplace. It is how the links between people in the workplace work. There are workplace politics at play in every organization!

In 1990, two American psychologists (Dr. Jack Mayer and Dr. Peter Salovey) purported that if there was a cognitive intelligence or IQ then there must be an emotional intelligence (sometimes known as EQ). Daniel Goleman, the co-founder of the Collaborative for Academic, Social, and Emotional Learning (CASEL) theorized the social aspect of behavior as a complement to the emotional. His definition expanded to: "Social and emotional intelligence involves understanding your feelings and behaviors, as well as those of others, and applying this knowledge to your interactions and relationships." In his work with CASEL he developed five interrelated sets of Social and Emotional Competencies: Self-Awareness, Self-Management, Social Awareness, Good Relationship Skills, and Responsible Decision Making. This course will explore the social and emotional competencies and their role in working beyond workplace politics!

### Learning Objectives

- Understand what Workplace Politics is and why it is not always bad
- Distinguish between formal and informal workplace hierarchies
- Use practical steps to negate the influence of rumors
- Define Social and Emotional Intelligence and understand their importance in navigating workplace politics
- Understand the importance of Self-Awareness in dealing with workplace politics and think about your own strengths and abilities
- Understand the role of Self-Management in the workplace and learn to improve self-management through reflection
- Understand the roles of Empathy, Organizational and Service Awareness in the workplace and social awareness skill development
- Identify good relationship skills
- See the importance of responsible decision making and identify decision traps that should be avoided
- Create your own Workplace Philosophy Statement

### Course Outline

- |                               |   |
|-------------------------------|---|
| 1. Session 1: Course Overview | 2. Session 2: What is Workplace Politics? |
| Learning Objectives           | Workplace Politics                        |
| Pre-Assignment                | Formal Versus Informal Hierarchy          |
| Pre-Course Assessment         | What to Do About Rumors                   |

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>3. Session 3: Lessons from Social and Emotional Intelligence <ul style="list-style-type: none"> <li>History of Social and Emotional Intelligence</li> <li>Defining Social and Emotional Intelligence</li> </ul> </li> <li>4. Session 4: Self-Awareness <ul style="list-style-type: none"> <li>Understanding Self-Awareness</li> </ul> </li> <li>5. Session 5: Self-Management <ul style="list-style-type: none"> <li>Understanding Self-Management</li> <li>Improving Self-Management through Reflection</li> <li>Reflective Diary</li> </ul> </li> <li>6. Session 6: Social Awareness <ul style="list-style-type: none"> <li>Empathy, Organizational and Service Awareness</li> <li>Empathy</li> <li>Organizational Awareness</li> <li>Service Awareness</li> </ul> </li> <li>7. Session 7: Good Relationship Skills <ul style="list-style-type: none"> <li>Identifying Relationship Skills</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>N'Derial III</li> <li>Individual Action Steps</li> <li>Reflection</li> <li>8. Session 8: Responsible Decision Making <ul style="list-style-type: none"> <li>Decision Making</li> <li>Decision-Making Traps</li> <li>Decision Wheel</li> <li>Decision Wheel Method</li> </ul> </li> <li>9. Session 9: Creating Your Workplace <ul style="list-style-type: none"> <li>Philosophy</li> <li>Philosophy Statement</li> </ul> </li> <li>10. A Personal Action Plan <ul style="list-style-type: none"> <li>Starting Point</li> <li>Where I Want to Go</li> <li>How I Will Get There</li> </ul> </li> <li>11. Course Summary</li> <li>12. Recommended Reading List</li> <li>13. Post-Course Assessment</li> </ul> |
|--|--|

## Body Language: Reading Body Language as a Sales Tool

### Course Overview

Are you able to use your body language to full advantage? There are many kinds of non-verbal messages that you can send with your body to help people understand you and want to listen to you.

### Learning Objectives

- Apply your knowledge of body language to improve communication
- Understand the impact of space in a conversation
- Understand the nuances of body language from a range of areas including your face, hands, arms, legs, and posture
- Use mirroring and matching techniques to build rapport
- Shake hands with confidence
- Dress for success

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | Body Language                             |
| Learning Objectives                        | Voice Characteristics                     |
| Pre-Assignment                             | Pacing                                    |
| Pre-Course Assessment                      | Leading                                   |
| 2. Session Two: Body Language              | 8. Session Eight: Monitoring Your Posture |
| Making The Grade                           | Looking At Your Posture                   |
| Looking Into Ourselves                     | Working On Your Posture                   |
| 3. Session Three: Give Me Some Space!      | 9. Session Nine: Dressing Up              |
| Space Issues                               | What Should I Wear?                       |
| 4. Session Four: What Is Your Face Saying? | Things To Consider                        |
| Your Face Is The Base                      | 10. Session Ten: Shaking Hands            |
| Tips to Try                                | Developing A Professional Handshake       |
| The Eyes Have It                           | 11. Session Eleven: How Are You Doing?    |
| 5. Session Five: What Is Your Body Saying? | Making Connections                        |
| Speaking With Your Hands                   | 12. Personal Action Plan                  |
| Tip  | Starting Point                            |
| Getting a Leg Up                           | Where I Want to Go                        |
| Tools Of The Trade                         | How I Will Get There                      |
| 6. Session Six: Pre-Assignment Review      | 13. Course Summary                        |
| Pre-Assignment Review                      | 14. Recommended Reading List              |
| Putting it Together                        | 15. Post-Course Assessment                |
| 7. Session Seven: Building Rapport         |   |
| Creating Relationships                     |   |
| Matching And Mirroring                     |   |
| Matching And Mirroring                     |   |

# Branding: Creating and Managing Your Corporate Brand

## Course Overview

A brand is the vehicle that propels a product or service into customers' lives, and into their hearts. A good brand is much more than an attractive image combined with some witty type. A brand must reflect the heart and soul of a product and offer a promise that an organization can live up to.

This course will help you to get started with creating a perfect brand. The course will cover the basics of branding, including how to develop a visual identity from start to finish. Some graphic design tips will also be provided to help you communicate your expectations to a professional designer. The course will also focus on how to present a brand in the right way. How to keep a brand energized and alive with monitoring and evaluation tools will also be discussed.

## Learning Objectives

- Define what a brand is (particularly a strong brand) and what branding encompasses
- Define various types of brand architecture and brand extension
- Identify a brand's products, the features of those products, and their values
- Write a mission, vision, and style statement for a brand
- Describe the basics of positioning a brand
- Understand the basics of creating a visual identity, including a brand name, slogan, and logo
- Help employees live the brand by empowering them to be ambassadors and creating strong brand touchpoints
- Effectively plan an internal and external brand launch
- Monitor and evaluate a brand, and understand how to respond to the results

## Course Outline

- |                                     |   |
|-------------------------------------|---|
| 1. Session One: Course Overview     |   |
| Learning Objectives                 | Time for Reflection                       |
| Pre-Assignment                      | 5. Session Five: Creating a Vision of the |
| Pre-Course Assessment               | Future                                    |
| 2. Session Two: Defining Branding   | Vision Statements                         |
| Defining Brands and Branding        | 6. Session Six: Positioning a Brand       |
| Characteristics of a Strong Brand   | Identifying the Ideal Position            |
| 3. Session Three: Reason for Being? | Positioning Workout                       |
| Identifying Products and Features   | 7. Session Seven: Developing a Style      |
| Identifying Values                  | Writing a Style Statement                 |
| Individual Exercise                 | Style Exercise                            |
| 4. Session Four: Creating a Mission | 8. Session Eight: Developing a Brand Name |
| What is a Mission Statement?        | and Slogan                                |

- The Forward-Facing Elements
- Developing a Brand Name
- Developing a Slogan
- 9. Session Nine: Creating a Visual Identity
  - Graphic Design 101
  - Types of Visual Identities
  - Pop Culture Test
- 10. Session Ten: Living the Brand
  - Transforming Employees into Ambassadors
  - Understanding Touchpoints
  - Creating a Unique Experience at Each Touchpoint
- 11. Session Eleven: Connecting with Customers
  - Customer Connections
  - Connecting with
- 12. Session Twelve: Launching a Brand
  - Launching a Brand
- 13. Session Thirteen: Taking the Brand's Pulse
  - Monitoring the Brand
- 14. Session Fourteen: Performing a SWOT Analysis
  - Sample SWOT Analysis
- 15. Session Fifteen: Measuring Brand Health with a Balanced Scorecard
  - A Balanced Scorecard
- 16. Session Sixteen: Middleton's Brand Matrix
  - Understanding the Matrix
  - Using the Matrix
- 17. Session Seventeen: Interpreting Evaluation Results
  - Signs of Trouble
- 18. Session Eighteen: Keeping the Brand Alive
  - Refreshing and Re-Launching
  - Taking on a Total Re-Brand
  - Case Study
- 19. Session Nineteen: Going Beyond the Brand
  - Brand Architecture
  - Understanding Brand Architecture:
- 20. A Personal Action Plan
- 21. Course Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment

## Budgets and Managing Money

### Course Overview

For managers in today's business world, it's essential to have a working knowledge of finance. We all play a role in our organization's financial health, whether we realize it or not. If you don't have training or a background in finance, you may be at a disadvantage as you sit around the management table.

Understanding the cycle of finance will help you figure out where you fit into your company's financial structure, and how to keep your department out of the red. This course will help you prepare budgets and make decisions with confidence.

### Learning Objectives

- Define basic financial terminology
- Prepare a budget of any type or size
- Get your budget approved
- Perform basic ratio analysis
- Make better financial decisions

### Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                    | Production Budget                       |
| Learning Objectives                              | Manufacturing Budget                    |
| Pre-Assignment                                   | Labor Budget                            |
| Pre-Course Assessment                            | Capital Budget                          |
| 2. Session 2: Finance Jeopardy                   | Cash Budget                             |
| Questions and Answers                            | Understanding Where Your Budget Fits In |
| 3. Session 3: The Fundamentals of Finance        | 5. Session 5: Parts of a Budget         |
| Recording Financial Transactions                 | The Planning Parts                      |
| Financial Statements vs. Financial Reports       | 6. Session 6: The Budgeting Process     |
| Types of Costs                                   | Overview                                |
| Generally Accepted Accounting Principles         | Step One: Gather the Budget Package     |
| Budgeting Terms                                  | Step Two: Lay the Groundwork            |
| Your Role in Company Finances                    | Case Study, Part One                    |
| The Key Players                                  | Budget Template                         |
| Identifying the Key Players in Your Organization | Step Three: Identify Your Goals         |
| 4. Session 4: The Basics of Budgeting            | Case Study, Part Two                    |
| Defining a Budget                                | Step Four: Gathering Your Resources     |
| Budget Responsibilities                          | Accounting Checklist                    |
| Key Budgeting Points                             | Marketing and Sales Checklist           |
| Types of Budgets                                 | Budget Management Team Checklist        |
| Sales Budget                                     | Checklist for Your Supervisor Checklist |
| Expense Budget                                   | Checklist for Your Team                 |
|  | Steps Five and Six: Planning and Doing  |

- Step Six: Do It!
- Case Study, Part Three
- Budget Template
- 7. Session 7: Budgeting Tips and Tricks
  - Top Ten Excuses for Being Over Budget
  - Up-Front Budget Maneuvers
  - Not-So-Nice Budget Maneuvers
- 8. Session 8: Monitoring and Managing Budgets
  - Making Connections
  - Making Connections Answer
- 9. Session 9: Crunching the Numbers
  - Understanding Ratio Analysis
  - Sample Balance Sheet
  - Current Ratio
  - Quick Ratio
  - Debt Ratio
  - Net and Gross Profit Margin
  - Return on Sales Ratio
  - Debt to Net Worth Ratio
  - Cash Turnover Ratio
  - Collection Ratio
  - Investment Turnover
  - Return on Investment
  - Making Connections
- 10. Session 10: Getting Your Budget Approved
  - Introduction
  - Tips to Get Your Budget Approved
- 11. Session 11: Comparing Investment Opportunities
  - The Importance of Analysis
  - Payback Period
  - Break-Even Point
  - Cost-Benefit Analysis
  - Return on Investment
- 12. Session 12: ISO 9001:2008
  - What is ISO 9001:2008?
  - Making Connections
  - Company Two
  - Company Three
- 13. Session 13: Directing the Peerless Data Corporation
  - Task Explanation
  - The Decision-Making Process
  - Background
  - Company Information
  - Salary Information
  - Decision One: Office Relocation
  - Decision 1 – Analysis
  - Decision
  - Decision Two: Reproduction Backlog
  - Decision Two: Analysis
  - Hire Reproduction Aid
  - Purchasing New Copying Equipment
  - Decision
  - Decision Three: Improving Supervision
  - Decision Three: Analysis
  - Decision
  - Decision Four: Job Enrichment
  - Decision Four: Analysis
  - Decision
  - Decision Five: Staff Expansion
  - Decision Five: Analysis
  - Decision
- 14. Session 14: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 15. Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment

# Building a Brand on Social Media

## Course Overview

Your brand speaks for your company and its products and/or services. In today's online-focused world, it's important that your brand has a definitive, consistent, and responsive presence.

Whether you're looking to build a brand from scratch, or strengthen an existing brand, this course will help you build a brand using social media. We'll cover how to build a social media strategy, identify social media platforms that fit your brand, craft strong messages that will engage your audience, and evaluate and revise your strategy.

## Learning Objectives

- Define terms related to social media branding
- Create a strategy for your social media brand
- Describe various social media platforms and identify what platforms fit your brand
- Communicate effectively over social media
- Deal with negative feedback and criticism
- Create a social media playbook to guide brand ambassadors
- Evaluate your brand strength and revise your strategy

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Defining the Terms
  - What is Branding?
  - What's in a Brand?
  - What is Social Media?
  - The Rise of Social Media
  - What is Social Media Branding?
3. Session 3: Building Your Social Media Branding Strategy
  - Key Ingredients for Your Branding Strategy
  - What Do You Want the Brand to Say?
  - What is the Brand Saying Now?
  - How Will the Brand Come to Life?
  - What Resources Will We Have?
  - How Will We Evaluate Our Progress?
  - Pre-Assignment Review
4. Session 4: Identifying Your Social Media Audience
  - Building an Audience Profile
5. Session 5: The Key Social Media Platforms
  - Choosing the Right Platform for Your Brand
  - Making Connections
  - Looking at the Options
6. Session 6: Creating Brand-Focused Messages
  - What's In a Message?
  - Looking at the Messages
  - Making Connections
  - Dealing with Negative Feedback
  - Case Study: United Breaks Guitars... And Their Brand
  - If You Break It, Then Fix It
7. Session 7: Building Customer Trust
  - Making Connections



- 8. Session 8: Developing a Communication Strategy
  - Developing Social Media Guidelines for Your Brand
  - Making Connections
  - Letting Others Speak For You
  - Case Study: The Fiskateers
  - Building Partnerships
- 9. Session 9: Reviewing and Revising
  - Evaluation Tools
  - Signs of Trouble
  - Choosing a Course of Action
- 10. Session 10: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 11. Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Building a Consulting Business

## Course Overview

Today's business environment isn't focused on 9-to-5, lifelong, static positions like it was decades ago. Our world is constantly shifting and evolving, meaning that businesses (and workers) must evolve with it. As a result of this shift, consultants have more opportunities than ever before. This course will show you how to build a business as a consultant.

## Learning Objectives

- Define the term "consultants" and explain their role in today's business world
- Identify consulting opportunities
- Create a business strategy that includes a business plan, budget, marketing plan, fee structure, and resources
- Use social media and networking skills to grow your consulting business
- Protect your work with contracts
- Identify ways to stay on top of trends and changes

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview          | Setting Your Base Hourly Rate          |
| Learning Objectives                    | Setting Goals                          |
| Pre-Assignment Instructions            | Setting up a Fee Structure             |
| Pre-Assignment                         | Other Fees to Consider                 |
| Pre-Course Assessment                  | Creating Rate Sheets                   |
| 2. Session 2: What It's All About      | Flexibility is Key                     |
| Defining the Terms                     | 5. Session 5: Planning Your Business   |
| Do You Have What It Takes?             | Creating a Business Plan               |
| 3. Session 3: Business Building Blocks | The One-Page Plan                      |
| Identifying the Possibilities          | The Formal Plan                        |
| Doing Your Research                    | Checklist for Setting Up Your Business |
| The Three Elements                     | Developing Your Business Structure     |
| Bringing It All Together               | Choosing Office Space                  |
| Taking it Further                      | Designing Your Contact Information     |
| Technical and Training Services        | Creating Promotional Materials         |
| Specialized Services                   | Gathering Resources                    |
| Project Management                     | 6. Session 6: Test Driving             |
| Pre-Assignment Review                  | Making Connections                     |
| 4. Session 4: Crunching the Numbers    | Financial Projections                  |
| Developing Financial Budgets and       | Creating Your Brand                    |
| Projections                            | Developing Your Business Structure     |
| Estimating Personal Expenses           | Choosing Office Space                  |
| Projecting Business Expenses           | Designing Your Contact Information     |
| Setting Income Targets                 | Creating Promotional Materials         |

- What Do You Think?
- 7. Session 7: Creating a Sales and Marketing Strategy
  - The Marketing Cycle
  - Cycle Overview
  - Looking at the Steps
  - Leveraging Social Media
  - Incorporating Social Media
  - Getting Noticed
  - Opportunities to Consider
- 8. Session 8: Getting the Work Done
  - Identifying Sources of Work
  - Developing Contracts and Statements of Work
- About Master Service Agreements
- Developing a Statement of Work
- Sample Statement of Work
- The Tough Stuff
- Dealing with Cancellations
- Firing a Client
- Staying Current
- 9. Session 9: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

# Building an Online Business

## Course Overview

The Internet has changed the way that we work, live, shop, and play. You can take advantage of this new way of doing business whether you want to set up a part-time venture or create the next million-dollar enterprise. This course will give you everything that you need to build a successful online business.

## Learning Objectives

- Define what an online business is
- Identify opportunities for an online business
- Find resources to support your business
- Create a business strategy that includes a business plan, budget, and marketing plan
- Begin setting up a website, mobile presence, and storefront with e-commerce support
- Decide whether or not your online business can benefit from joining an online marketplace
- Market your online business using social media and the Internet

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview                       | Looking at the Steps                        |
| Learning Objectives                                 | Creating Financial Projections              |
| Pre-Assignment                                      | Part One: The Sales Process (I)             |
| Pre-Course Assessment                               | Part One: The Sales Process (II)            |
| 2. Session 2: How Online Businesses Can Benefit You | Part Two: Sales Metrics                     |
| A Brief History                                     | Part Three: Expenses                        |
| Benefits of Online Businesses                       | Raising Startup Capital with Crowdfunding   |
| Words of Warning                                    | Case Studies                                |
| 3. Session 3: Laying the Groundwork                 | 6. Session 6: Building Your Online Business |
| Who Are You?  | The Basic Elements                          |
| Doing Your Research                                 | Creating a Website                          |
| Outlining Your Ideas                                | Checking Out the Sites, Part One            |
| Pre-Assignment Review                               | E-Commerce Options                          |
| 4. Session 4: Creating a Business Plan              | E-Commerce Payment Options                  |
| Creating a Business Plan                            | Security and Privacy Considerations         |
| The One-Page Plan                                   | Creating a Mobile Presence                  |
| Sample Business Plan                                | Creating Apps                               |
| Gathering Resources                                 | Checking Out the Sites, Part Two            |
| 5. Session 5: Breaking Down the Plan                | Joining Online Marketplaces                 |
| Creating a Marketing Plan                           | Amazon                                      |
| Cycle Overview                                      | eBay  |
|   | Specialty Marketplaces                      |

7. Session 7: Internet Marketing Basics
  - Social Media Strategies for Success
  - Facebook
  - Twitter
  - Instagram
  - Pinterest
  - YouTube
  - Building Relationships
8. Session 8: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
9. Summary
10. Recommended Reading List
11. Post-Course Assessment

## Building Better Teams

### Course Overview

Teams are an important building block of successful organizations. Whether the focus is on service, quality, cost, value, speed, efficiency, performance, or other similar goals, teams are the basic unit that supports most organizations.

### Learning Objectives

- Understand the value of working as a team
- Develop team norms, ground rules, and team contracts
- Identify your team player style and how it can be used effectively with your own team
- Build team trust
- Identify the stages of team development and how to help a team move through them
- Recognize the critical role communication skills will play in building and maintaining a team atmosphere
- Identify ways that team members can be involved and grow in a team setting

### Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment: What's Your Team Player Type?
  - Identifying Your Characteristics and Preferences
  - Example
  - Questionnaire
  - Pre-Course Assessment
2. Session Two: Defining Teams
  - What is a Team?
  - What Does That Mean?
  - Types of Teams
  - Making Connections
3. Session Three: Establishing Team Norms
  - Characteristics of Teams
  - Ground Rules
  - Team Contracts
  - Sample Team Contract
4. Session Four: Working as a Team
  - Putting it Into Perspective
  - No Need for Black and White Thinking
  - Degrees of Support
5. Session Five: Your Team Player Type
  - What's Your Team Player Type?
  - Your Score
  - What Does it Mean To Have a Number?
  - Mostly A's – Inquiring Rationals
  - Mostly B's – Authentic Idealists
  - Mostly C's – Organized Guardians
  - Mostly D's – Resourceful Artisans
  - What's Important?
  - My Team Style
6. Session Six: Building Team Trust
  - Why is Trust Important?
  - What Happens When Teams Trust Each Other?
  - Building Trust
7. Session Seven: The Stages of Team Development
  - Introduction
  - Stage One: Forming
  - Stage Two: Storming
  - Stage Three: Norming
  - Stage Four: Performing
  - Stage Five: Adjourning
  - Activity

- Forming an Effective Team
- Making Connections
- 8. Session Eight: Virtual Teams
  - Virtual Teams
  - Strategies for Virtual Team Success
  - Scheduling and Conducting Team Meetings
  - Team Building in a Virtual Environment
  - Informal Bonding Interaction
- 9. Session Nine: Communication
  - Defining Communication
- Listening Skills
  - Tips for Becoming a Better Listener
- Session Ten: Becoming a Good Team Player
  - Attitude is Everything
- 10. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

## Building Relationships for Success in Sales

### Course Overview

No one questions that making friends is a good thing. In this course, you are going to discover that the business of business is making friends, and the business of all sales professionals is making friends and building relationships. Strategic friendships will make or break any business, no matter how big and no matter what kind of market.

### Learning Objectives

- Discover the benefits of developing a support network of connections
- Understand how building relationships can help you develop your business base
- Learn how to apply communication techniques to build your network
- Identify the key elements in strong working relationships, and how you might put more of these elements in your working relationships
- Recognize the key interpersonal skills and practice using them

### Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview           | 4. Session 4: Disclosure                      |
| Learning Objectives                     | Disclosure                                    |
| Pre-Assignment                          | Self-Awareness and the Johari Windows         |
| Pre-Course Assessment                   | Understanding the Johari Window               |
| 2. Session 2: Focusing on Your Customer | Building Relationships with the Johari Window |
| Customer Focused Selling                | Working with the Johari Window                |
| Minimizing Challenges                   | 5. Session 5: How to Win Friends and          |
| Becoming Customer Focused               | Influence People                              |
| Understanding Effort vs. Results        | About Dale Carnegie                           |
| How You Fit in the Quadrants            | Discussing Carnegie's Principles              |
| Considering the Possibilities           | Talking about Interests                       |
| 3. Session 3: What Influences People in | Try to See Things from Their Point of View    |
| Forming Relationships?                  | Changing the View                             |
| Influences at Work                      | Genuinely Like Other People                   |
| Appearance                              | Liking Others through Common Ground           |
| Similarity                              | Smile   |
| Complementarity                         | Make Them Feel Important                      |
| Reciprocity                             | Remembering Names                             |
| Competence                              | Don't Criticize Others                        |
| Proximity                               | Avoid Criticizing                             |
| Exchange                                | What's in it for Me?                          |
| The Effect of the Influences            | Comparing the Stories                         |
| Building Customer Connections           | Carnegie's Principles                         |
| Building Common Ground                  |   |



- 6. Session 6: Communication Skills for Relationship Selling
  - Active Listening
  - Responding to Feelings
  - Reading Cues
  - Demonstration Cues
  - Tips for Becoming a Better Listener
  - Asking Questions
  - Using Open Questions
  - Creating Customer Focused Questions
  - Good Listeners
- 7. Session 7: Non-Verbal Messages
  - Non-Verbal Messages
  - Managing Your Messages
  - Voice
  - Qualities of a Good Voice
- 8. Session 8: Managing the Mingling
  - Understanding Networking
  - Tips for Remembering Names
- 9. Session 9: The Handshake
  - The Handshake
  - Improving Your Handshake
  - Tips for Success
- Business Card Etiquette
- 10. Session 10: Small Talk
  - Small Talk
  - Making Small Talk
  - Starting Conversations
  - Small Talk Tips
  - Exit Lines
  - Creating Exit Lines
- 11. Session 11: Networking
  - Organizing Your Network
  - Networking Tips
  - Wise Words
  - Revisiting the Pre-Assignment
  - John and Jane
  - Questions for Reflection
  - Our Thoughts
- 12. Session 12: Personal Development
  - Personal Action Plan
  - Achieving My Goals
- 13. Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment

## Building Trust to Win the Sale

### Course Overview

Trust is the foundation of any relationship, including those between salespeople and clients. Successful sales professionals know that all information, positive or negative, is useful for building trust. Shifting objections and complaints into discussions that close the sale is both necessary and beneficial for both salesperson and customer; a sale is made, and a customer receives a desired product or service that had previously been dismissed or avoided.

This course will help salespeople effectively work through objections, arguments and complaints to find common, respectful space for conversation that leads to trust and positive results..

### Learning Objectives

- Identify steps to build credibility
- Describe the objections that are encountered most frequently
- Develop appropriate responses when prospective buyers offer challenges
- Meet objections with effective rebuttals
- Recognize when a prospect is ready to buy
- Determine ways to work with a sales team for success

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                | What are Objections?                      |
| Learning Objectives                            | Pre-Assignment Review                     |
| Pre-Assignment                                 | 8. Session Eight: Handling Objections     |
| Pre-Course Assessment                          | Universal Strategies                      |
| 2. Session Two: Building Credibility           | Specific Strategies                       |
| First Impressions                              | 9. Session Nine: Pricing Issues           |
| 3. Session Three: The Competition              | Handling Pricing Objections               |
| Addressing the Competition                     | Skill Building Exercise                   |
| 4. Session Four: Critical Communication Skills | Reflection                                |
| Active Listening                               | 10. Session Ten: The Benefits of Teamwork |
| Listening for Accuracy                         | Understanding the Value of Teamwork       |
| Powerful Questions                             | 11. Session Eleven: Buying Signals        |
| 5. Session Five: Observation Skills            | Reading the Signs                         |
| What to Look For                               | 12. Session Twelve: Closing the Sale      |
| 6. Session Six: Handling Customer Complaints   | Closing Techniques                        |
| Find Complaints and Fix Them                   | Activities to Close the Sale              |
| Change the Outcome                             | Sell it to Me                             |
| 7. Session Seven: Overcoming Objections        | Presentations                             |

13. A Personal Action Plan  
14. Course Summary

15. Recommended Reading List  
16. Post-Course Assessment

## Building Your Self Esteem and Assertiveness Skills

### Course Overview

Healthy self-esteem and self-confidence are essential for growth and achieving success. Of all the judgments you make in life, none is as important as the one you make about yourself.

### Learning Objectives

- Recognize that you have worth and are worthy of happiness
- Know the difference between self-esteem and self-confidence
- Develop techniques for eliminating unhealthy thought patterns and replacing them with supportive patterns
- Learn how to turn negative thoughts into positive thoughts
- Know how to act more assertively and understand why this is important to self-esteem and self-confidence
- Use different techniques to gain confidence
- Deal with setbacks in a way that does not damage self-esteem
- Set goals that reflect your dreams and desires and reinforce healthy patterns

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                 | Recognizing Behaviors                                      |
| Learning Objectives                             | Being Assertive  |
| Pre-Assignment                                  | Assertiveness Formula                                      |
| Pre-Course Assessment                           | Assertiveness Practice                                     |
| 2. Session Two: Self-Esteem and Self-Confidence | Other Techniques   |
| Definitions                                     | 6. Session Six: Gaining Confidence                         |
| Origins of Low Self-Esteem                      | Techniques that Work                                       |
| Putting Things in Perspective                   | 7. Session Seven: The Power of Thought                     |
| 3. Session Three: Improving Self-Esteem         | Negative Thoughts  |
| How To Stop Destroying Our Own Self-Esteem      | Flip it Around   |
| Stop Spreading Negative Messages                | Tyrone's Thinking  |
| Throw Out Perfectionism                         | Debrief  |
| 4. Session Four: Building Self-Esteem           | Case Study   |
| Helping Others Can Boost Self-Esteem            | 8. Session Eight: Dealing with Setbacks                    |
| Using Your Skills to Help Others                | How to Handle Mistakes and Failures in a More Positive Way |
| 5. Session Five: Assertiveness                  | 9. Session Nine: Create What You Want                      |
| Types of Behavior                               | Identifying Dreams and Setting Goals                       |
|   | Setting SMART Goals  |

My Own Goal Setting  
10. Personal Action Plan  
Starting Point  
Where I Want to Go

How I Will Get There  
11. Course Summary  
12. Recommended Reading List  
13. Post-Course Assessment

# Bullying in the Workplace

## Course Overview

Bullying can be hard to identify and address. People wonder, what does bullying look like? How can we discourage it in our workplace? What can I do to protect my staff and co-workers? All of these questions (and more!) will be answered in this course.

## Learning Objectives

- Define what constitutes bullying
- Understand the costs of bullying to people and organizations
- Identify bullying behaviors and the reasons behind them
- Know some ways to prevent bullying and understand what role you can play
- Know some ways to protect yourself from bullying
- Know what to do if you are bullied
- Identify appropriate solutions for a bullying incident (within and outside the organization)
- Assist in creating an anti-bullying policy

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Defining Bullying
  - What Is Bullying?
  - Some Scary Statistics
  - Trivia Time
  - The Costs Of Bullying
3. Session Three: Why Bullies Do What They Do
  - Origins Of Bullying Behavior
  - Defining Bullying Behavior
  - Summary
  - Other Types Of Bullying
4. Session Four: Building A Shield Against Bullies
  - Distorted Thinking
  - Your Toolkit Against Bullies
  - Setting Boundaries
  - Identify Your Wants And Needs
  - Throw Out Perfectionism
5. Session Five: What To Do If It Happens To You
  - When Does Bullying Happen?
  - How Do I Know If I Am Being Bullied?
  - What Works And What Does Not Work?
  - Dealing With Workplace Bullies
  - Applying My Skills
6. Session Six: What To Do If You Witness Bullying
  - Speak Up!
  - Witnesses Taking Action
  - Things To Say
7. Session Seven: Creating An Anti-Bullying Workplace
  - Creating Anti-bullying Policies
  - Writing The Policy
  - Educating Staff
  - Implementing And Enforcing Anti-Bullying Policies
  - Lesson For The Workplace
8. Session Eight: The Law On Bullying
  - Bullying Laws

9. Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
10. Course Summary
11. Recommended Reading List
12. Post-Course Assessment

# Business Ethics for the Office

## Course Overview

What exactly makes a decision ethical? The problem with ethics is that what may seem morally right (or ethical) to one person may seem appalling to another.

This course will not provide an easy way to solve every ethical decision anyone will ever have to make. It will, however, help participants define their ethical framework to make solving those ethical dilemmas easier. It will also look at tools that can be used when faced with an ethical decision. It will examine techniques that can be used so participants do not get stuck in an ethical quandary. Best of all, it will go through case studies so that participants can practice making decisions in a safe environment.

## Learning Objectives

- Understand the difference between ethics and morals
- Understand the value of ethics
- Identify your values and moral principles
- Be familiar with philosophical approaches to ethical decisions
- Identify ways to improve ethics in your office
- Outline what is required to start developing an office code of ethics
- Understand ways to avoid ethical dilemmas
- Use tools to help you make better decisions

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                        | An Introduction to Philosophy                        |
| Learning Objectives                                    | Applying Philosophical Approaches                    |
| Pre-Assignment   | 7. Session Seven: What Does Ethical Mean?            |
| Pre-Course Assessment                                  | Merck Pharmaceuticals                                |
| 2. Session Two: What are Ethics?                       | Decision Analysis                                    |
| Defining Ethics and Morals                             | 8. Session Eight: Avoiding Ethical Dilemmas          |
| Values Identification                                  | Some Easy Strategies                                 |
| Bringing It All Together                               | Case Studies   |
| 3. Session Three: Moral Temperature                    | 9. Session Nine: Pitfalls and Excuses                |
| Case Studies   | Common Pitfalls                                      |
| 4. Session Four: Why Bother with Ethics?               | 10. Session Ten: Developing an Office Code of Ethics |
| Ethical Behavior                                       | Getting Ready  |
| 5. Session Five: Kohlberg's Six Stages                 | Sample Codes of Ethics                               |
| The Six Stages and Three Levels                        | Developing a Code of Ethics                          |
| Different Levels for Different Situations              | Making Connections                                   |
| Identifying Stages                                     | 11. Session Eleven: Ethical Issues for Business      |
| 6. Session Six: Objective Ways of Looking at the World | Fundamental Ethical Issues for Business              |



- Twenty-Two Keys
- Pre-Assignment Review
- 12. Session Twelve: Basic Decision-Making Tools
  - The Three-Phase Model
  - Phase One
  - Phase Two
  - Phase Three
  - The Problem-Solving Toolkit
- 13. Session Thirteen: Ethical Decision-Making Tools
  - Four Tools
  - Case Study
- 14. Session Fourteen: Dilemmas with Company Policy
  - Policy Dilemmas
- 15. Session Fifteen: Dilemmas with Co-Workers
- Potential Dilemmas
- Case Studies
- 16. Session Sixteen: Dilemmas with Clients
  - Make a Decision
- 17. Session Seventeen: Dilemmas and Supervisors
  - Dilemmas with a Supervisor
  - Dilemmas as a Supervisor
- 18. Session Eighteen: What to Do After a Mistake
  - Six-Step Plan
- 19. Session Nineteen: Moral Temperature Revisited
  - Case Studies Revisited
- 20. Personal Action Plan
- 21. Course Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment

## Business Etiquette: Gaining That Extra Edge

### Course Overview

If you've ever had an awkward moment where:

- You don't know which side plate is yours,
- You cannot remember the name of someone when attending a meeting,
- You've ever had to make small talk with a Very Important Person and been lost for words...

Then you know just how agonizing such moments can be. Even worse (and what can be even more damaging to your career) are the social gaffes you are not even aware you make. This course will help you handle most of those socially difficult moments. You will have an extra edge in areas you may not have given a lot of thought to before.

### Learning Objectives

- Network effectively, including making introductions, shaking hands, and using business cards appropriately
- Dress appropriately for every business occasion
- Feel comfortable when dining in business and formal situations
- Feel more confident about your business communication in every situation
- Develop that extra edge to establish trust and credibility

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                | Small Talk   |
| Learning Objectives                            | What Works?  |
| Pre-Assignment                                 | What Does Not Work?                                  |
| Pre-Course Assessment                          | Exit Lines   |
| 2. Session Two: Business Etiquette Basics      | 7. Session Seven: Do You Remember Names?             |
| Business Etiquette Basics                      | Tips on Remembering Names                            |
| Lack of Etiquette Examples                     | Name Recognition Activity                            |
| 3. Session Three: Test Your Business Etiquette | 8. Session Eight: Making That Great First Impression |
| Pre-Assignment Review                          | First Impressions                                    |
| 4. Session Four: Introductions                 | 9. Session Nine: Dress for Success                   |
| Making Introductions                           | Dressing the Part                                    |
| The Handshake: Mastering the Technique         | Maintaining Your Positive Impression                 |
| Notes about Other Cultures                     | What is Your Code?                                   |
| 5. Session Five: Business Card Etiquette       | 10. Session Ten: Business Dining                     |
| Business Card Etiquette                        | Seven Hot Tips                                       |
| Are Business Cards Still Relevant?             | Place Setting Practice                               |
| 6. Session Six: The Skill of Making Small Talk | Other Rules  |

- 11. Session Eleven: Email and Telephone  
Etiquette
  - Establishing Rules
  - Debrief
  - The Power of the Written Word
  - Note Writing Practice
- 12. Session Twelve: Meeting Etiquette
  - Organizing and Attending Meetings

- Tips for Meeting Organizers
  - Tips for Meeting Attendees
  - Electronic Meetings
- 13. Personal Action Plan
- 14. Course Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment
- 17. Congratulations

# Business Process Management

## Course Overview

Business process management helps organizations leverage processes to achieve their goals and be successful. Once processes are implemented, they must be monitored, evaluated, and optimized to make sure they are still meeting the goals that they were designed to accomplish. A business that can successfully manage its processes is able to maintain a competitive edge, while increasing productivity and efficiency, and decreasing costs.

This course will introduce you to business process management. You will learn how business process management can help you improve your company's bottom line by providing a higher level of quality and consistency for your customers.

## Learning Objectives

- Define business process management and related concepts
- Recognize the vital role played by processes in a business
- Appreciate the role of technology in process management
- Develop a vision to guide process improvement
- Understand how to design or enhance an existing process using the business process life cycle
- Construct a process map
- Perform a what-if analysis to improve your processes
- Implement and monitor process changes
- Identify how Lean and Six Sigma methods can assist in managing and improving processes
- Use a variety of tools and techniques to eliminate waste and redundancies

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview              | 4. Session Four: Reflecting on Processes     |
| Learning Objectives                          | Pre-Assignment Review                        |
| Pre-Assignment                               | 5. Session Five: The Business Process Life   |
| Pre-Course Assessment                        | Cycle  |
| 2. Session Two: The Fundamentals of Business | Steps of the Cycle                           |
| Process Management                           | 6. Session Six: The Vision Phase             |
| What is Business Analysis?                   | Creating a Vision and Seeing the Big Picture |
| What is Enterprise Content Management?       | Sharing the Vision                           |
| What is Business Process Re-Engineering?     | Dreaming Big                                 |
| 3. Session Three: Defining Business Process  | 7. Session Seven: The Design Phase           |
| Management                                   | Gathering Information                        |
| What is Business Process Management?         | Defining the Problem                         |
| Benefits of Business Process Management      | Identifying Existing and Future Processes    |

- About Process Mapping
- Process Mapping using a Flow Chart
- Process Mapping with a Swimlane Diagram
- Map it Out
- Defining Improvements
- Establishing Functions and Identifying Function Leaders
- Identifying Function Leaders
- 8. Session Eight: The Modeling Phase
  - Performing What-if Analysis
  - Case Study: Healthcare Billing
  - Test Driving
- 9. Session Nine: The Execution Phase
  - Implementing Processes
  - Exploring Automation
  - Automating Processes
  - Making Connections
  - The Role of Workflow Engines
  - Case Studies
  - Steps to Implement a Workflow Engine
- 10. Session Ten: The Monitoring Phase
  - Implementing Measures
  - What is Business Activity Monitoring (BAM)?
  - The Balanced Scorecard
  - Case Study: Creating a Balanced Scorecard
  - Identifying Gaps with Process Mining
- 11. Session Eleven: The Optimizing Phase
  - What it is All About
  - Business Process Improvement
  - Introduction to Lean
  - Cut Out the Waste
  - Introduction to Six Sigma
  - Tie It All Together
- 12. Personal Action Plan
- 13. Course Summary
- 14. Recommended Reading List
- Post-Course Assessment

## Business Succession Planning

### Course Overview

Does your organization have a plan ready for replacing key personnel when they leave the organization?

Part of Indigenous Education & Training College's Human Resources series, this course is intended for Human Resources professionals who want to establish a business succession plan. It covers all of the basics, including why succession planning is necessary, how to identify critical roles, how to assess the talent pool, how to prepare successors, and how to evaluate the plan once it has been implemented.

This proactive approach will make sure that organizations have qualified people set to take the place of those who leave, ensuring continuity and knowledge retention, and keeping disruption of business operations to a minimum.

### Learning Objectives

- Understand the value of succession planning for successful businesses
- Identify critical roles in a business
- Define core competencies
- Complete talent assessments
- Implement talent development and training programs
- Understand why it is important to review and monitor a succession plan
- Understand the importance of updating the plan continually

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                     | Competencies                                     |
| Learning Objectives                                 | Complete Talent Assessment                       |
| Pre-Assignment                                      | Sample Form                                      |
| Pre-Course Assessment                               | Compiling the Results                            |
| 2. Session Two: The Need for Succession Planning    | High Potential                                   |
| What is Succession Planning and Why Do It?          | Leadership Quality Assessment - Confidential     |
| How To Obtain Buy-in                                | Risk Assessment and Forecasting Demand           |
| Definitions   | 5. Session Five: Talent Development and Training |
| Steps of Succession Planning                        | Establishing Individualized Engagement Plans     |
| 3. Session Three: Key Positions                     | Succession Plan Profile                          |
| Pre-Assignment Review                               | Making Connections                               |
| Identify Critical Roles                             | Coaching, Mentoring and Training                 |
| 4. Session Four: Competencies and Talent Assessment |  |

6. Session Six: Putting Together the Plan
  - Key Ingredients of a Successful Plan
  - Using Software
  - Phased Implementation
  - Succession Plan Organizational Chart
7. Session Seven: Evaluating the Plan
  - Evaluation Challenges
  - Sample Evaluation

- Succession Program Evaluation Checklist
  - Action Steps That Result from This Assessment Checklist
8. Personal Action Plan
  9. Course Summary
  10. Recommended Reading List
  11. Post-Course Assessment

# Business Writing That Works

## Course Overview

In business writing, it is important to convey a clear message and include all necessary information. Professional communication should be courteous, easy to understand, and free of spelling or grammar errors. If a document is poorly written, it is unlikely to be taken seriously.

While there are many types of business writing, this course will provide you with the tools to write effective memos, emails, and letters. It will also provide an overview of reports and proposals.

## Learning Objectives

- Understand how to write business documents that are clear, concise, complete, and correct
- Display manners and courtesy in professional, written communication
- Discern the proper format for memos, letters, and emails
- Check documents for readability, spelling, grammar, and any potential errors
- Conduct a thorough review of letters, emails, and memos

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview           | Activity: Writing an Email                 |
| Learning Objectives                       |  |
| Pre-Assignment                            | 6. Session Six: Reports and Proposals      |
| Pre-Course Assessment                     | What Is a Report?                          |
|   | What Is a Proposal?                        |
| 2. Session Two: The C's of Writing        | Making Connections: Ensuring Success       |
| Clear Writing                             | 7. Session Seven: Writing Business Letters |
| Concise Writing                           | Parts of a Business Letter                 |
| Activity: Writing Concisely               | Steps to Writing Business Letters          |
| Complete Writing                          | Types of Letters                           |
| Correct Writing                           | Dissecting Letters                         |
| 3. Session Three: Manners and Courtesy    | 8. Session Eight: Readability Index        |
| Courtesy                                  | Readability Index                          |
| How to Show Courtesy in Your Writing      | Calculating the Index Automatically        |
| Letters with Manners                      | Using the Readability Index                |
| Tips for Using Courtesy in Letters and    | Beyond the Readability Score               |
| Emails                                    | 9. Session Nine: Proofreading              |
| 4. Session Four: Writing Memos            | Check the Spelling, Grammar, and           |
| The Anatomy of a Memo                     | Punctuation                                |
| Making Connections: Acme Funfest          | 10. Session Ten: Reviewing Writing         |
| 5. Session Five: Writing Effective Emails | A Final Review                             |
| Email Basics                              | Pre-Assignment Review                      |
| Managing Email                            | 11. Personal Action Plan                   |



- 12. Course Summary
- 13. Recommended Reading List
- 14. Post-Course Assessment

# Call Center Training: Sales and Customer Service Training for Call Center Agents

## Course Overview

Whether an employee is answering or making calls, there are certain skills that can be helpful for anyone working in a telephone-based role.

This course will help call center agents develop their skills in communication and listening. It will explore different situations, such as objections, being unable to fulfill a customer request, and angry callers, and assist customer service representatives in determining how to respond in each instance.

## Learning Objectives

- Understand aspects of verbal communication such as tone, cadence, and pitch.
- Demonstrate an understanding of questioning and listening skills.
- Feel comfortable delivering bad news and saying “no.”
- Recognize what it means to negotiate and know how to do so effectively.
- Grasp the importance of creating and delivering meaningful messages.
- Appreciate the value of personalizing interactions and developing relationships.
- Practice vocal techniques that enhance speech and communication ability.
- Personalize techniques for managing stress.

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview              | The Mission: To Listen                       |
| Learning Objectives                          | 7. Session Seven: Asking the Right Questions |
| Pre-Assignment                               | Open Questions vs. Closed Questions          |
| Pre-Course Assessment                        | Probing Techniques                           |
| 2. Session Two: Telephone Communication      | 8. Session Eight: Saying “No”                |
| It Is Not What You Say; It Is How You Say It | When We Say “No”                             |
| Does Body Language Matter?                   | Delivering Bad News                          |
| 3. Session Three: Verbal Communication       | 9. Session Nine: Sales by Phone              |
| Techniques                                   | Benefits of Telemarketing                    |
| Being Yourself and Sounding Your Best        | Rapport Building                             |
| Sounding the Best                            | 10. Session Ten: Taking Messages             |
| A Service Image                              | Relaying Information                         |
| 4. Session Four: Who are The Customers?      | Effective Messages                           |
| Defining Customer and Client                 | 11. Session Eleven: Voicemail                |
| About Relationships                          | Proper Voicemail Messages                    |
| 5. Session Five: To Serve and Delight        | 12. Session Twelve: Taking Care of the Voice |
| The Meaning Behind What is Said              | Vocal Exercises                              |
| 6. Session Six: Did You Hear Me?             | 13. Session Thirteen: Cold and Warm Calls    |
| Listening Skills                             | The Cold Call                                |

- The Warm Call
- 14. Session Fourteen: Developing a Script
  - Scripting Techniques
  - Sample Script
- 15. Session Fifteen: Perfecting the Script
  - Making the Script One's Own
  - Using Cheat Sheets
- 16. Session Sixteen: Going Above and Beyond
  - Techniques for CCA Success
  - Customer Service
- 17. Session Seventeen: Handling Objections
  - Overcoming Hesitation
- 18. Session Eighteen: Closing the Sale
  - Closing Questions
- 19. Session Nineteen: Feelings
  - Demonstrating Empathy
- 20. Session Twenty: Changes in the Customer
  - Adapting to New Expectations
  - What the Customer Wants
- 21. Session Twenty-One: Negotiation
  - Techniques
  - Mastering Negotiation Skills
- 22. Session Twenty-Two: Negotiation Phases
  - Phases of Negotiation
  - Negotiation Made Easier
- 23. Session Twenty-Three: High Impact Moments
  - Make It Count
  - Creating Case Studies
- 24. Session Twenty-Four: Tips for Challenging Callers
  - Tips and Tricks
  - Caller Behaviors
  - Challenging Callers
- 25. Session Twenty-Five: Dealing with Difficult Customers
  - Dealing with Problems
- 26. Session Twenty-Six: Getting the Call Back
  - Phone Tag
  - Following Up
- 27. Session Twenty-Seven: Mentorship
  - Case Study: Roger's Super Year
- 28. Session Twenty-Eight: Stress Busting
  - Overcoming Stress
- 29. Session Twenty-Nine: News from Within
  - Management Reports
  - CCA Reports
- 30. Personal Action Plan
- 31. Course Summary
- 32. Recommended Reading List
- 33. Post-Course Assessment

# Cannabis and the Workplace

## Course Overview

One of the most commonly used recreational drugs in the world is cannabis. No matter what the legal status of using cannabis is where you live and work, employees who are under the influence of the drug can become an issue in your workplace. This course will help you develop the skills and knowledge to mitigate the risks to safety and lost productivity, and create a policy to protect employees from harm and the company from loss.

## Learning Objectives

- Understand what cannabis and other forms of cannabis are and how they are used
- Understand how cannabis use affects a person physically, cognitively, and behaviorally
- Recognize the signs of cannabis impairment
- Define the potential issues cannabis use creates in the workplace
- Understand the legal rights of employers and employees with regards to cannabis use in the workplace
- Respond to incidents of suspected cannabis use in the workplace
- Develop a proactive workplace drug and alcohol policy

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview         | Practicing the Difficult Conversation     |
| Learning Objectives                     | Role Play                                 |
| Pre-Assignment                          | 7. Session Seven: Drug and Alcohol Policy |
| Pre-Course Assessment                   | Why a Drug and Alcohol Policy?            |
| 2. Session Two: Drugs and the Workplace | Developing a Policy                       |
| Why Is Drug Use a Workplace Issue?      | Preliminary Step 1: Objective             |
| 3. Session Three: Cannabis              | Preliminary Step 2: Participants          |
| The Cannabis Plant                      | Preliminary Step 3: Environmental Scan    |
| Cannabis and Your Body                  | Making Connections                        |
| Debunking the Myths                     | Policy Content                            |
| 4. Session Four: Workplace Impacts      | Making Connections                        |
| Trouble in the Workplace                | Drug and Alcohol Testing                  |
| Cannabis and Productivity               | Applying and Publicizing the Policy       |
| Productivity                            | 8. Personal Action Plan                   |
| Safety                                  | Starting Point                            |
| 5. Session Five: Medical Cannabis       | Where I Want to Go                        |
| Rights and Responsibilities             | How I Will Get There                      |
| Medical Cannabis Scenarios              | 9. Course Summary                         |
| 6. Session Six: How to Intervene        | 10. Recommended Reading List              |
| The Intervention Process                | 11. Post-Course Assessment                |

# Cleaning and Sanitizing

## Course Overview

This course reviews how and when to clean and sanitize equipment, utensils, and other surfaces.

## Learning Objectives

- Understand the differences between cleaning and sanitizing.
- Recognize common types of cleaning and sanitizing chemicals.
- Know the steps to clean and sanitize, either manually or with a dishwasher.
- Identify when surfaces need to be cleaned and sanitized.
- Know how to use wiping cloths.
- Properly store cleaned and sanitized items, chemicals, and cleaning tools.
- Create and use a master cleaning schedule.

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                  | Cleaning and Sanitizing Review             |
| Learning Objectives                              | Dishwasher Temperature Requirements        |
| Pre-Assignment                                   | Pre-Assignment Review                      |
| Pre-Course Assessment                            |  |
| 2. Session Two: Steps of Cleaning and Sanitizing | 3. Session Three: Cleaning the Facility    |
| What is Cleaning and Sanitizing?                 | Wiping Surfaces                            |
| Cleaning   | Storage                                    |
| Sanitizing                                       | Chemical Storage Review                    |
| Sanitizer Guidelines                             | Cleaning Supplies                          |
| How and When to Clean and Sanitize               | Master Cleaning Schedule                   |
| When to Clean and Sanitize                       | Reviewing a Basic Master Cleaning Schedule |
| Dishwashing Methods                              | 4. Personal Action Plan                    |
| Manual Warewashing                               | 5. Course Summary                          |
| Using a Dishwasher                               | 6. Recommended Reading List                |
|  | 7. Post-Course Assessment                  |

# Coaching and Mentoring

## Course Overview

Coaching is based on a partnership that involves giving employees support, along with giving them challenging opportunities. Knowing how and when to coach is an essential skill that can benefit both you and your organization. This course defines coaching and gives participants the opportunity to assess their strengths and opportunities as a coach. It will also outline several items that should be in every coach's toolkit, and look at a coaching model that will help trainees get tangible results.

## Learning Objectives

- Understand how coaching can be used to develop team members.
- Develop the coaching skills that help improve individual performance.
- Demonstrate the behaviors and practices of an effective coach.
- Recognize employees' strengths and give them the feedback they need to succeed.
- Use a number of coaching tools within their practice.
- Use a coaching model to help trainees get tangible results.

## Course Outline

- |                                       |  |
|---------------------------------------|--|
| 1. Session One: Course Overview       | Probing Techniques                       |
| Learning Objectives                   | Active Listening Skills                  |
| Pre-Assignment - Introduction         | Responding to Feelings                   |
| Pre-Assignment - Assessment           | Tips for Becoming a Better Listener      |
| Pre-Course Assessment                 | 5. Session Five: Coaching Toolkit –      |
| 2. Session Two: Defining Coaching and | Critical Coaching Skills                 |
| Mentoring                             | The Five Skills                          |
| Coaching and Mentoring                | Mix and Match                            |
| Matching Mentors                      | 6. Session Six: Coaching Toolkit –       |
| Defining Coaching                     | Learning Styles and Principles           |
| The Coaching Formula                  | Learning Styles                          |
| The Three Factors                     | Identify some activities for each        |
| Coaching Skills                       | learning style:                          |
| 3. Session Three: Coaching Assessment | Adult Learning Principles                |
| Review                                | 7. Session Seven: Coaching Toolkit – The |
| Coaching Assessment and Scoring       | Benefits/Consequences Matrix             |
| Making Connections                    | The Benefits/Consequences Matrix         |
| 4. Session Four: Coaching Toolkit –   | Four-Quadrant Matrix Activity            |
| Communication Skills                  | 8. Session Eight: Coaching Toolkit –     |
| Interpersonal Communication Skills    | Giving Effective Feedback                |
| Improving Communication               | 9. Session Nine: Coaching Problems and   |
| Probing Techniques                    | Solutions                                |

Coaching Problems and Solutions Questions	What Challenges Stand in the Way of Attaining Your Goals?
10. Session Ten: The Coaching Model	What Is the Way Forward?
The Coaching Model	Deciding Which Actions to Take
What Are Your Goals?	Staying on Track
SMART Goals	11. Personal Action Plan
The Coaching Model	12. Course Summary
What is Your Current Reality?	13. Recommended Reading List
	14. Post-Course Assessment

# Code of Conduct: Setting the Tone for Your Workplace

## Course Overview

Workplaces are made up of diverse groups of people with diverse motivations, backgrounds, and ethics. When such groups are brought together, sometimes there are opportunities for ethical, moral, financial, or even legal, boundaries to be crossed. Sometimes those boundaries are crossed with disastrous results.

A workplace code of conduct is a tool that can be used to prevent such digressions by providing a framework for employees to follow what is expected of them and how to conduct themselves in various situations.

This course will look at the material that goes into a code of conduct and will allow participants to build their own as the day goes on.

## Learning Objectives

- Identify what a code of conduct is and why a business should have one
- Identify what goes into a code of conduct
- Discuss how to implement a code of conduct in the workplace
- Create a code of conduct for a business

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview                 | Sample Codes                                |
| Learning Objectives                           | Asimov's Three Laws of Robotics             |
| Pre-Assignment                                | Code of Conduct for Members of the          |
| Pre-Course Assessment                         | United States Armed Forces                  |
| 2. Session 2: What Is It, and Why?            | Principles of Conduct for the International |
| For Your Consideration                        | Red Cross and Red Crescent Movement         |
| Pre-Assignment Review                         | and NGOs in Disaster Response               |
| 3. Session 3: What to Leave In, What to Leave | Programmes                                  |
| Out   | For Your Consideration                      |
| What to Include                               | 6. Session 6: What to Do When You Make a    |
| What to Exclude                               | Mistake                                     |
| Identifying Areas of Risk                     | 7. Session 7: Auditing                      |
| Evaluation Methods                            | Auditing                                    |
| Who Writes It?                                | Sample Audit Questions                      |
| 4. Session 4: What's It All About?            | 8. Session 8: Putting it Together           |
| In a Word                                     | The Toolbox                                 |
| Spreading the Word                            | Online resources                            |
| Training                                      | Making Connections                          |
| Violations                                    | 9. A Personal Action Plan                   |
| 5. Session 5: A Random Sample                 | Starting Point                              |



Where I Want to Go  
How I Will Get There

10. Course Summary  
11. Recommended Reading List

# Collaboration

## Course Overview

Collaboration is a skill that is utilized with one or more people to produce or create a result or shared goal. Everyone in the group has a shared vision or outcome. The group not only has to work together, they must think together, and the product comes from group effort. Collaborators are equal partners. Do we know what it takes to achieve successful collaboration with colleagues? What are the importance and benefits of collaboration in the workplace and how can employers create a collaborative environment and reward employees for collaborative efforts?

## Learning Objectives

- Understand the definition of collaboration
- Distinguish collaborative qualities individuals often possess
- Know and understand what it takes to work collaboratively with your colleagues
- Discover the difference between collaboration, cooperation and teamwork
- Know what a collaborative environment looks like
- Know the six steps to make collaboration work
- Understand the advantages of collaboration
- Be aware of obstacles to collaboration
- Develop strategies to improve a collaborative work environment
- Share tips for employers to reward collaboration
- Understand how technology affects collaboration

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview             | 4. Session Four: Benefits of Collaboration   |
| Learning Objectives                         | What Are the Advantages of Collaboration     |
| Pre-Assignment                              | Collaborative Workspace                      |
| Pre-Course Assessment                       | Corporate Culture of Collaboration           |
| 2. Session Two: Being Collaborative         | Features to Help Create a Collaborative      |
| What is Collaboration?                      | Workspace                                    |
| Who is a Collaborator?                      | Design Your Collaborative Workspace          |
| Qualities of a Collaborator                 | 5. Session Five: Common Obstacles            |
| 3. Session Three: Elements of Successful    | Five Arguments Against Collaboration         |
| Collaboration                               | Tips to Overcome Collaborative Obstacles     |
| Elements of Collaboration                   | Rewarding Team Collaboration                 |
| Five Elements of a Successful Collaboration | 6. Session Six: Technology and Collaboration |
| Collaboration, Teamwork, Cooperation:       | Technology and Collaboration                 |
| What is the Difference?                     | Implementing Technology to Facilitate        |
| How to Make Collaboration Work: 6           | Collaboration                                |
| Predictable Stages                          | Collaborative Conclusion                     |

7. Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
8. Course Summary
9. Recommended Reading List
10. Post-Course Assessment

## Communications for Small Business Owners

### Course Overview

Communication between individuals is a two-way street, but communication between a small business and its customers is a multi-lane highway. Navigate this highway successfully and the business will see an increase in customers and profits. If a company sets out on this highway unaware, ill-prepared, or unconvinced of its importance, they will lose ground to their competitors.

This course will introduce and reinforce the essential components of written communication that connect businesses with existing and potential customers. For someone new to the communications highway, this course will provide the foundation for future development. For people who already have some communications expertise, this course will help strengthen and polish the essential components.

### Learning Objectives

- Define the essential pieces of communication
- Customize these essential pieces for your company
- Identify the processes and plans needed for clear communication
- Develop and maintain effective communication content

### Course Outline

- |                                       |   |
|---------------------------------------|---|
| 1. Session One: Course Overview       | Choosing a Communications Route               |
| Learning Objectives                   | Making Connections                            |
| Pre-Assignment                        | Establishing a Communication Vehicle          |
| Pre-Course Assessment                 | Developing an Approval Process                |
| 2. Session Two: Key Communication     | Approval Process Guidelines                   |
| Components                            | Inbound vs. Outbound                          |
| What Communication Is All About       | Making Connections                            |
| Pre-Assignment Review                 | 5. Session Five: The Five C's of a Successful |
| 3. Session Three: The Building Blocks | Message                                       |
| Business and Marketing Strategy       | Be Clear                                      |
| Making Connections                    | Be Concise                                    |
| Public Relations Plan                 | Be Complete                                   |
| Allow Some Flexibility                | Be Correct                                    |
| Working on the Plan                   | Be Compelling                                 |
| Elevator Pitch and Executive Summary  | 6. Session Six: Communication Strategies      |
| Developing a Pitch                    | Setting a Goal for Each Communication         |
| Practice Makes Perfect                | Piece   |
| 4. Session Four: A Communication Plan | Strengthening the Core Message                |
| Getting on the Communication Highway  | Thinking MEDIA                                |
| Selecting a Communication Destination | 7. Session Seven: Sharing Information         |
| Making Connections                    | Through Media Releases                        |

- Key Pieces of the Media Release
- Drafting a Message
- Writing Practice
- 8. Session Eight: Communicating Online
  - Blogging Tips and Tricks
  - Making Connections
  - Connecting Through Social Media
  - Social Media Plan Worksheet
- 9. Session Nine: Using Stories to Communicate
  - The Importance of Stories
  - Tell Me A Story
- 10. Session Ten: Polishers and Time Savers
  - Communication Fact Sheets
  - Getting It Together
- Reduce, Reuse, and Recycle
- 11. Session Eleven: Enhancing Results
  - Search Engine Optimization (SEO)
  - Optimizing Results
  - Taking a Communication Pulse
  - Focusing on the Research
  - SWOT Analysis
  - Making Connections
- 12. Session Twelve: Maintaining The Message
  - Communicating in a Crisis
- 13. A Personal Action Plan
- 14. Course Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment

## Communication Strategies

### Course Overview

Have you ever wondered why it seems so difficult to talk with some people, yet so easy to talk with others? Can you recall an occasion where you met someone for the first time and immediately liked that person? Something about the individual made you feel comfortable.

A major goal of this course is to help you understand the impact your communication skills have on other people. You will also explore how improving these skills can make it easier for you to get along in the workplace, and in life.

### Learning Objectives

- Identify common communication problems that may be holding you back
- Develop skills to ask questions that give you information you need
- Learn what your non-verbal messages are telling others
- Develop skills to listen actively and empathetically to others
- Enhance your ability to handle difficult situations
- Deal with situations assertively

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview         | Pushing My Buttons                              |
| Learning Objectives                     | 7. Session Seven: Listening Skills              |
| Pre-Assignment                          | Can You Hear Me?                                |
| Pre-Course Assessment                   | How Do You Rate Your Listening Ability?         |
| 2. Session Two: Creating Positive       | Active Listening Skills                         |
| Relationships                           | Tips for Becoming a Better Listener             |
| Ten Quick Wins                          | What is Said and What is Heard                  |
| Making Connections                      | Communication Situations                        |
| 3. Session Three: Growing Our           | 8. Session Eight: Body Language                 |
| Self-Awareness                          | What Do Our Bodies Say?                         |
| Do You Question Your Competence?        | The Signals People Send                         |
| Developing Confidence                   | Gestures  |
| 4. Session Four: Communication Basics   | 9. Session Nine: Communication Styles           |
| Defining a Skilled Communicator         | Dichotomies in Theory                           |
| 5. Session Five: Communication Barriers | Making Connections                              |
| Case Study: New Neighbors               | Dichotomies in Action                           |
| Common Barriers                         | 10. Session Ten: Creating a Positive Self-Image |
| Applying the Answers                    | Seven Things People Determine from Your         |
| Being Mindful                           | Appearance                                      |
| 6. Session Six: Asking Questions        | Pre-Assignment Review                           |
| Asking Good Questions                   | Self-Evaluation                                 |
| Probing                                 | 11. Session Eleven: Frame of Reference          |

Your Frame of Reference  
12. Session Twelve: Techniques for the  
Workplace  
Prepare, Prepare, Prepare  
Testing Our Theories  
Delivering Your Message  
13. Session Thirteen: Assertiveness  
Self-Attitude

Your Inner Self Talk  
Persuasion  
Case Study: A Negative Image  
The Assertive Formula  
Expressing Your No  
14. Personal Action Plan  
15. Course Summary  
16. Recommended Reading List  
17. Post-Course Assessment

# Conducting Accurate Internet Research

## Course Overview

As the Internet grows, it becomes more challenging to find the correct information from a reliable source in a timely manner. As research expert Gary Price puts it, “The haystack is growing and finding the needles takes more time and requires greater skill.”

This course will teach you how to conduct accurate Internet research by creating a search plan, searching both the surface web and the deep web, and staying organized. You will also learn how to think critically and find the best sources for your Internet search.

## Learning Objectives

- Describe why Internet research skills are important
- Create a search plan
- Identify what resources are the most appropriate for your search
- Search the surface web and the deep web using a variety of tools
- Assess the credibility and validity of a website
- Organize research notes
- Cite sources and avoid plagiarism

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview           | Performing an Advanced Search          |
| Learning Objectives                     | Using Advanced Search Tools            |
| Pre-Assignment                          | Overview of the Options                |
| Pre-Course Assessment                   | About Boolean Operators                |
| 2. Session 2: Creating a Search Plan    | Searching for Quick Facts              |
| Key Elements of a Search Plan           | Weather                                |
| Making Connections                      | Stock Information                      |
| Expanding the Question                  | Movie Information                      |
| Where Am I Going to Find the Answers?   | Word Tools                             |
| How Deep Should I Go?                   | Flight Information                     |
| Getting Focused                         | Internet Scavenger Hunt                |
| 3. Session 3: Searching the Surface Web | Debrief                                |
| What is a Search Engine?                | 4. Session 4: Diving Into the Deep Web |
| How Search Engines Work                 | About the Deep Web                     |
| Metasearch Engines                      | Searching the Deep Web                 |
| Graphic Search Engines                  | Making Connections                     |
| Specialized Search Engines              | 5. Session 5: Searching for Multimedia |
| Building a Keyword List                 | Search Techniques                      |
| Sample Search                           | Searching for Images                   |
| Making Connections                      | Searching for Audio and Videos         |
| Step-By-Step Searching Guide            | Making Connections                     |



- 6. Session 6: Assessing Research Sites
  - Analyzing Your Sources
  - About Top-Level Domains
  - About Wikipedia
  - Making Connections
  - Checking Your Facts
  - Understanding Primary and Secondary Sources
  - Double-Check Your Facts
  - Check Out the Site
  - Identify Advertisements
- 7. Session 7: Staying Organized with Research Tools
  - Understanding the Options
  - Organizing Information
  - Microsoft OneNote
  - Evernote
- Zotero
- CiteULike
- EasyBib
- Advanced Software Packages
- 8. Session 8: Citing Sources
  - Don't Plagiarize!
  - Information to Gather
  - Documentation Styles
  - Sample Citations
- 9. Session 9: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

# Conducting Effective Performance Reviews

## Course Overview

### 1. Course Summary

#### Learning Objectives

- Recognize the importance of having a performance review process for employees
- Understand how to work with employees to set performance standards and goals
- Develop skills in observing, giving feedback, listening, and asking questions
- Identify an effective interview process and have the opportunity to practice the process in a supportive atmosphere
- Make the performance review legally defensible

#### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview                     | The Need for Standards                            |
| Learning Objectives                                 | Modelling Standards                               |
| Pre-Assignment                                      | Setting Effective Standards                       |
| Pre-Course Assessment                               | 9. Session Nine: The Interview                    |
| 2. Session Two: Performance Reviews Defined         | A Basic Format                                    |
| What are Performance Reviews?                       | Preparation                                       |
| Making Connections                                  | Role Plays  |
| Building Trust                                      | 10. Session Ten: Active Listening                 |
| 3. Session Three: Types of Performance Reviews      | Listening and Hearing                             |
| Choosing Effective Performance Reviews              | The Mission: To Listen                            |
| Winning Performance Reviews                         | 11. Session Eleven: Asking Effective Questions    |
| 4. Session Four: The Performance Management Cycle   | Basic Skills                                      |
| The Four Phases                                     | Probing   |
| The Basis for Review                                | 12. Session Twelve: Productive Feedback           |
| 5. Session Five: The Performance Management Process | The Importance of Feedback                        |
| The Four Steps                                      | Six Characteristics                               |
| Performance Review Forms                            | Case Studies                                      |
| 6. Session Six: Minimizing Bias                     | Accepting Criticism                               |
| Areas of Bias                                       | 13. Session Thirteen: Handling Performance Issues |
| Making Connections                                  | Make the Commitment                               |
| 7. Session Seven: SMART Goals                       | Maintaining and Modifying Performance             |
| Identifying Intentions and Setting Goals            | Letting Them Go                                   |
| My Intentions and Goals                             | Performance Management Checklists                 |
| Putting it all Together                             | 14. Session Fourteen: Coaching                    |
| 8. Session Eight: Setting Standards                 | The Importance of Coaching                        |
|   | Non-Verbal Messages                               |
|   | 15. Session Fifteen: Pre-Assignment Review        |

Re-Evaluate  
16. Personal Action Plan  
17. Course Summary

18. Recommended Reading List  
19. Post-Course Assessment

# Conference and Event Management

## Course Overview

Although it takes plenty of creativity to design an event that is memorable and meaningful, it also takes adaptability, careful attention to detail, and a lot of work. This course will walk you through the process of event management, from the beginning stages of planning, to the final touches (decorations, food, and music).

While this course is specifically for corporate event planning, the elements here can also be applied to more personal event planning such as anniversaries, special birthday gatherings, weddings, and more. Essentially, the course provides a template for an effective and well-planned event that is ready for implementation and can be used over and over again.

## Learning Objectives

- Plan a complete corporate event, including an agenda, budget, and goals
- Keep your event on budget
- Select an appropriate venue
- Design a promotional plan
- Make your event unforgettable
- Select speakers and a master of ceremonies to add impact to your event
- Engage your event participants
- Evaluate the event after it is over

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview           | Getting the Word Out                         |
| Learning Objectives                       | Gathering Support                            |
| Pre-Assignment                            | 6. Session Six: Selecting the Venue          |
| Pre-Course Assessment                     | Brainstorming                                |
| 2. Session Two: Event Planning Essentials | Picking an Appropriate Place                 |
| Setting Goals and Objectives              | 7. Session Seven: Food                       |
| Getting Organized                         | Key Considerations                           |
| 3. Session Three: Budgeting Basics        | 8. Session Eight: Selecting Speakers and a   |
| Budget Planning                           | Master of Ceremonies                         |
| Pre-Assignment Review                     | People in Your Event                         |
| Getting Strict About the Budget           | 9. Session Nine: Engaging the Audience       |
| 4. Session Four: Getting Others on Board  | Make Your Event Memorable                    |
| Getting the Right People Doing the Right  | 10. Session Ten: Before and During Event Day |
| Things                                    | Before the Event                             |
| Connecting with Partners and Sponsors     | Event Day                                    |
| Inviting Sponsors                         | 11. Session Eleven: After the Event          |
| 5. Session Five: Promotion                | Gathering Feedback                           |

Feedback Questions  
Designing Feedback  
Creating the Conference Report  
Post-Event Meeting  
12. Session Twelve: Planning Practice

Creating an Event Plan Draft  
13. Personal Action Plan  
14. Course Summary  
15. Recommended Reading List  
16. Post-Course Assessment

# Conflict Resolution: Getting Along In The Workplace

## Course Overview

Many people see conflict as a negative experience. In fact, conflict is a necessary part of our personal growth and development. Conflict becomes an issue when the people involved cannot work through it. They become engaged in a battle that does not result in growth. When this type of conflict arises, negative energy can result, causing hurt feelings and damaged relationships. This course will give you the tools that will help you resolve conflict successfully and produce a win-win outcome.

## Learning Objectives

- Understand what conflict is and how it can escalate
- Understand the types of conflict and the stages of conflict
- Recognize the most common conflict resolution styles and when to use them
- Increase positive information flow through non-verbal and verbal communication skills
- Develop effective techniques for intervention strategies
- Become more confident of your ability to manage conflicts to enhance productivity and performance

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                | Self-Reflection                           |
| Learning Objectives                            | Your Style                                |
| Pre-Assignment                                 | The Questionnaire                         |
| Pre-Course Assessment                          | Score Sheet                               |
| 2. Session Two: Defining Conflict              | The Conflict Grid                         |
| What is Conflict?                              | Advantages and Disadvantages of           |
| Definitions of Conflict                        | Different Conflict Management Styles      |
| How Do You Define Conflict?                    | 5. Session Five: How To Get Along With    |
| Assumptions                                    | Co-Workers                                |
| Positives and Negatives                        | Being Amicable                            |
| 3. Session Three: Types and Stages of Conflict | Managing Emotions - Your Own              |
| The Types of Conflict                          | Emotions                                  |
| Another Version of Conflict Stages             | Managing Emotions - The Emotions of       |
| Stage 2: Disagreement                          | Others                                    |
| Stage 3: Dispute                               | 6. Session Six: The Role of Communication |
| Stage 4: Campaign                              | in Conflict Resolution                    |
| Stage 5: Litigation                            | The Communication Chain                   |
| Stage 6: Fight and/or War                      | Barriers                                  |
| 4. Session Four: Self-Awareness                | Establishing Positive Intent              |
| Pre-Assignment Review                          | Accepting Differences                     |
|  | 7. Session Seven: Communication Skills    |

- Active Listening
- Tips for Becoming a Better Listener
- Probing Techniques
- 8. Session Eight: Conflict Outcomes
  - Outcomes - Lose-Lose
  - Outcomes - Win-Lose
  - Outcomes - Win-Win
  - Conflict Management Strategies
  - Win-Lose Strategy
  - Lose-Lose Strategy
  - Apply the Rules
  - Results of Win-Lose and Lose-Lose Strategies
  - Win-Win Strategy
- 9. Session Nine: Conflict Resolution
  - The Conflict/Opportunity Test
  - Practice
  - Needs and Assumptions Model
  - Conflict Resolution Process
  - Assumptions when Using the Conflict Resolution Process
  - Hands-On Steps
  - Conflict Process Template
  - Skills Test
- 10. Personal Action Plan
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Conquering Your Fear of Speaking in Public

## Course Overview

Do you get nervous when making presentations at company meetings? Do you find it hard to make conversation at gatherings and social events? Do you lock up in awkward social situations? If so, this course is just for you!

## Learning Objectives

- Speak with more confidence in one-on-one conversations
- Feel more confident speaking socially or small groups such as meetings
- Practice developing these skills in a safe and supportive setting

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Good Communication Skills
  - Defining Communication
  - Pre-Assignment Review
  - Barriers to Communication
3. Session Three: Interpersonal Skills
  - Listening
  - Steps to Active Listening
  - Responding to Feelings
  - Reading Cues
  - Demonstration Cues
  - Tips for Becoming a Better Listener
  - Why Do People Have Difficulty Listening?
  - Asking Questions
4. Session Four: Getting Comfortable in Conversation
  - Four Levels
  - Level One: Small Talk
  - Level Two: Fact Disclosure
  - Level Three: Viewpoints and Opinions
  - Level Four: Personal Feelings
5. Session Five: Practicing Dialogue
  - Making Connections
6. Session Six: Redesigning Yourself for Strength
  - Controlling Your Voice
  - Body Language
7. Session Seven: Professionalism
  - Looking Professional
  - Speaking Professionally
  - Avoid Fillers
8. Session Eight: Maximizing Meetings
  - Four Areas of Opportunity
  - Fifteen Ways to Master a Meeting
9. Session Nine: Sticky Situations
  - Making Connections
10. Session Ten: Controlling Nervousness
  - About Nerves
  - Controlling Physical Nervousness
  - Capitalizing on the Law of Attraction
11. Session Eleven: Tell Me a Story
  - Making Connections
12. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
13. Course Summary
14. Recommended Reading List
15. Post-Course Assessment



# Consent and Boundaries in the Workplace

## Course Overview

Research shows that fostering a culture that prioritizes consent and clear boundaries in the workplace enhances employee well-being while also reducing conflicts and improving productivity. When organizations emphasize policies that promote mutual respect, clear communication, and defined personal and professional limits, they create an environment where employees feel safe and valued. Establishing and maintaining boundaries is a shared responsibility, requiring individuals to assert their needs and limits while employers provide the tools, training, and support to ensure these boundaries are respected. This course will explore the foundational principles of consent and boundary-setting for both work and personal spaces, equipping participants with the knowledge and skills to cultivate a respectful and inclusive workplace for all.

## Learning Objectives

- Understand and define consent and boundaries
- Set and communicate their own boundaries
- Recognize the importance of boundaries in a professional setting
- Comprehend varying needs individuals may have regarding boundaries and consent
- Assertively and respectfully address situations where their own or a peer's boundaries are not being respected
- Encourage an overall culture of consent and respect in the workspace
- Evaluate and offer suggestions for consent and boundary-focused practices

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview           | The Building Blocks of Boundaries          |
| Course Overview                           | Strengthening Boundaries                   |
| Content Warning                           | 4. Session Four: Consent and Boundaries    |
| Learning Objectives                       | for the Workplace                          |
| Pre-Assignment                            | The Respectful Workplace                   |
| Pre-Course Assessment                     | Importance of Workplace Boundaries         |
| 2. Session Two: Boundaries and Consent in | Case Study                                 |
| Everyday Life                             | Making Connections                         |
| Boundaries and Consent Defined            | 5. Session Five: Consent and Boundaries in |
| Boundaries in Life and Work               | Context                                    |
| Making Connections                        | Key Concepts                               |
| 3. Session Three: Defining Boundaries     | Intersectional Experiences                 |
| Boundaries in Practice                    | Boundaries and Intersectionality           |

- |  |   |
|--|---|
| 6. Session Six: Facilitating Consent Culture<br>Workplace Assessment<br>Revisiting Boundaries<br>Evaluation and Continuous Improvement | 7. Personal Action Plan<br>8. Course Summary<br>9. Recommended Reading List<br>10. Post-Course Assessment |
|--|---|

# Contamination and Food Allergens

## Course Overview

This course reviews physical and chemical contamination, including how to prevent it. It also reviews food allergens and how to keep customers with food allergies safe.

## Learning Objectives

- Identify physical and chemical contaminants
- Recognize symptoms of physical and chemical contamination
- Know how to prevent physical and chemical contamination
- Identify steps to prevent deliberate contamination of food
- Know the nine major food allergens and other common food allergens
- Identify signs of an allergic reaction
- Prevent allergic reactions
- Read food labels to identify allergens

## Course Outline

- |                                   |   |
|-----------------------------------|---|
| 1. Session One: Course Overview   | Learning about Allergic Reactions       |
| Learning Objectives               | Preventing Allergic Reactions           |
| Pre-Assignment                    | Service Staff/Front of the House        |
| Pre-Course Assessment             | Workers                                 |
| 2. Session Two: Contamination     | Kitchen Staff/Back of the House Workers |
| Pre-Assignment Review             | Kitchen Staff/Back of the House Workers |
| Physical Contaminants             | Food Labels                             |
| Sources                           | 4. Personal Action Plan                 |
| Symptoms                          | 5. Course Summary                       |
| Prevention                        | 6. Recommended Reading List             |
| Physical Hazard Scenarios         | 7. Post-Course Assessment               |
| Chemical Contaminants             |   |
| Sources                           |   |
| Symptoms                          |   |
| Prevention                        |   |
| Chemical Contamination Case Study |   |
| Deliberate Contamination of Food  |   |
| ALERT                             |   |
| 3. Session Three: Food Allergens  |   |
| What is a Food Allergen?          |   |
| Common Food Allergens             |   |
| Identifying Allergens             |   |
| Identifying Allergens             |   |
| Food Allergy Symptoms             |   |
| Food Allergy Symptoms             |   |

## Continuous Improvement with Lean

### Course Overview

Companies everywhere, no matter what their industry, can benefit from the principles of continuous improvement with Lean. Whether they adopt a very formal process or commit to something less structured, they can follow its principles and improve their bottom line by reducing wasted time and resources.

This course is designed for learners who have completed the pre-requisite Lean Process Improvement course, and perhaps have been involved in implementation of its principles in their workplace. It is the ideal next step along the path of learning and creating a workplace culture committed to continuous improvement.

### Learning Objectives

- Describe what continuous improvement with Lean is all about
- Explain the concepts of the continuous improvement cycle: Identify, Plan, Execute, and Review
- Apply Lean continuous improvement concepts to a case study
- Present ideas for continuous improvement

### Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                | Where Are You At?                            |
| Learning Objectives                          |  |
| Pre-Assignment                               | 5. Session 5: Stage Three – Implement the    |
| Pre-Course Assessment                        | Changes                                      |
| 2. Session 2: Defining Continuous            | Taking the Lead                              |
| Improvement                                  | Staying Focused                              |
| Definitions                                  | Value Stream                                 |
| Continuous Improvement                       | 6. Session 6: Stage Four – Review the Impact |
| Pre-Assignment Review                        | Remember to be Green with Lean               |
| How Can Lean Help?                           | Making Connections                           |
| Fully Adopted                                | The Review Stage                             |
| Four-Stage Cycle                             | Checklist for Success                        |
| Making Connections                           | The Three-Foot Circle                        |
| 3. Session 3: Stage One – Identify Areas For | Review in Progress                           |
| Improvement                                  | Making Connections                           |
| Making It Valuable                           | 7. Session 7: Test Driving                   |
| Test the Theory                              | Background Information                       |
| 4. Session 4: Stage Two – Create a Plan for  | Case Study                                   |
| Improvement                                  | Identify Opportunities for Improvement       |
| Building the Plan                            | Define the Process to Improve                |
| Breaking Down the Steps                      | Toolkit: Flow Charts                         |
| Next Steps                                   | Toolkit: Ishikawa Diagrams                   |
|  | Toolkit: SIPOC Diagrams                      |

Toolkit: Value Stream Map  
Work on Your Plan  
Polish Your Plan  
8. A Personal Action Plan  
Starting Point

Where I Want to Go  
How I Will Get There  
9. Course Summary  
10. Recommended Reading List  
11. Post-Course Assessment

## Conversational Leadership

### Course Overview

Effective leaders understand how powerful an opportunity can be when they can tap into the intelligence, wisdom, and innovation present in their workforce. Conversational leadership provides the space and infrastructure for knowledge sharing to take place; for employees, stakeholders, and the community to be involved in discussing big, important questions; and to generate solutions that people within the organization can take action on.

### Learning Objectives

- Understand the wisdom inherent in encouraging conversational leadership
- Describe the four I's of conversational leadership
- Apply the principles of conversational leadership to improve results
- Organize a simple World Café as an example of conversational leadership

### Course Outline

- |                                     |   |
|-------------------------------------|---|
| 1. Session 1: Course Overview       | Sample Strategy Elements                    |
| Learning Objectives                 | Common Language                             |
| Pre-Assignment                      | Making Connections                          |
| Pre-Course Assessment               | 5. Session 5: The Conversational Leadership |
| 2. Session 2: What's In A Word?     | Framework                                   |
| Pre-Assignment Review               | Getting Started                             |
| What is Conversational Leadership?  | Powerful Conversations                      |
| 3. Session 3: Fundamental Elements  | Case Study                                  |
| Designing Meaningful Conversations  | Making Connections                          |
| Building Your Personal Skills       | Creating the Conversation                   |
| Tips for Becoming a Better Listener | Identifying Your Purpose                    |
| 4. Session 4: The Four-I Model of   | The Physical Setup                          |
| Organizational Conversation         | The Finishing Touches                       |
| Intimacy                            | Above and Beyond                            |
| The Four Features                   | Involving Your Stakeholders                 |
| Replacing Corporate Communication   | Applying the Concepts                       |
| Interactivity                       | Summary                                     |
| Evolving Communication Techniques   | Developing the Questions                    |
| Case Study                          | Leveraging Appreciative Inquiry             |
| Making Connections                  | Getting It Right                            |
| Inclusion                           | Taking It Further                           |
| Looking at Inclusive Communications | Getting to the Goal                         |
| Case Studies                        | Making Connections                          |
| Intentionality                      | Innovative Leadership                       |
| Creating a Conversational Strategy  | Building Common Ground                      |

- Questions to Consider
- 6. Session 6: World Café
  - Setting Up
  - Where the Magic Happens
  - Round 1: Starting the Conversation
  - Round 2: Connections Start
  - Round 3: Back to the Beginning
  - Round 4: Conversation of the Whole
- 7. Session 7: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 8. Course Summary
- 9. Recommended Reading List
- 10. Post-Course Assessment

## Corrective Action

### Course Overview

We all try to do the best work that we can, however, there are times when things go wrong, and problems arise. These things can be in or out of control and result in work that is less than it could be. That is why we take corrective action — to address any problems, deficiencies, or nonconformities that come up from time to time.

In this course, we discuss how collaborative problem-solving can lead us to the root causes of problems, deficiencies, or nonconformities so that we, with our team, can use a corrective action process to correct the problem and verify the success of our actions.

### Learning Objectives

- Outline the corrective action process
- Compare and contrast nonconformances, correction, corrective action and preventive action
- Integrate preventive action into a corrective action process
- Identify problems through customer complaints and audits
- Use risk assessment to assess the significance of problems
- Apply various tools (brainstorming, brainwriting, fishbone diagrams) to identify possible underlying factors of a problem
- Understand the fundamentals of other tools (Pareto Analysis, FMEA, Control Charts) to identify possible underlying factors of a problem
- Use The Five Whys to identify the root cause of a problem
- Understand the importance of verifying the root cause
- Employ collaborative decision-making to apply the appropriate action to eliminate the root cause of a problem
- Use SMART Objectives to make corrective action verifiable
- Verify the effectiveness of corrective actions taken

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | CAPA Plan                                   |
| Learning Objectives                        | 5. Session Five: Identify a Problem Through |
| Pre-Assignment                             | Customer Complaints                         |
| Pre-Course Assessment                      | Customer Complaints/Feedback                |
| 2. Session Two: Problem-Solving Model      | Complaint Investigation                     |
| Corrective Action Model                    | 6. Session Six: Identify a Problem Through  |
| Reflection                                 | Internal Audits                             |
| 3. Session Three: Preventative Action      | Nonconformances                             |
| Definitions                                | Basics of an Internal Audit                 |
| Preventive Action Plan                     | Developing an audit Checklist               |
| 4. Session Four: Corrective and Preventive |   |



7. Session Seven: Assess the Significance of the Problem  
Risk Assessment
8. Session Eight: Identify the Root Cause  
Root Cause Analysis  
Tools to Identify Possible Underlying Factors  
Other Tools to Identify Possible Underlying Factors  
Identify the Root Cause(s)  
Reasons for Incorrect Root Cause Determination  
Verify the Root Cause
9. Session Nine: Determine and Apply the Appropriate Action  
Collaborative Decision-Making  
Making Corrective Action Verifiable
10. Session Ten: Verify the Effectiveness of the Actions Taken  
Verification  
Why Do Some Recent ISO Standards not Include Preventive Action?
11. Personal Action Plan
12. Course Summary
13. Recommended Reading List
14. Post-Course Assessment

# Creating a Dynamite Job Portfolio

## Course Overview

The job market continues to change, as does the way we look for work. This course examines the value of presenting yourself as a complete package by using a resume as an introduction to an employer and backing it up with a portfolio presented at the interview.

## Learning Objectives

- Speak about yourself using descriptive language
- Apply the essential elements of cover letters and resumes
- Understand the need for pre-employment testing and what to expect in your target market
- Design a personalized portfolio
- Develop a plan that moves you to a new job within 60 days

## Course Outline

- |                                   |  |
|-----------------------------------|--|
| 15. Session 1: Course Overview    | General Style Tips                           |
| Learning Objectives               | Check Up On Yourself                         |
| Pre-Assignment Instructions       | Writing the Resume                           |
| Pre-Assignment Worksheet          | Resume Writing as a Profession               |
| Work History                      | 18. Session 4: Creating a Noticeable Package |
| Pre-Course Assessment             | Personal Branding                            |
| 16. Session 2: Who Are You?       | Branding Ideas                               |
| Exploration                       | Types of Resumes                             |
| Creating Target Statements        | Chronological                                |
| Standing Out from the Crowd       | Functional                                   |
| Self-Description                  | Combination                                  |
| Creating Strong Statements        | More Than One Resume?                        |
| Sample Statements                 | A Note about Electronic Resumes              |
| A Few Guidelines                  | 19. Session 5: Cover Letters                 |
| Making Connections                | Essential Ingredients                        |
| Punch Up Your Action Statements   | Step One                                     |
| 17. Session 3: Writing the Resume | Strong Openers to Try                        |
| Essential Ingredients             | Step Three                                   |
| Length                            | Step Four                                    |
| Proofreading                      | The Writing                                  |
| Contact Information               | 20. Session 6: Getting into the Flow         |
| Objective                         | Making Connections                           |
| Skill Summary                     | 21. Session 7: The Portfolio                 |
| Work Experience                   | Essential Components                         |
| Accomplishments                   | What Should Be Included?                     |
| Education                         | Designing Your Portfolio                     |

- 22. Session 8: Refining and Perfecting  
Making Connections
- 23. Session 9: Dealing with Awkward Points  
Gaps in Your Resume  
Incarceration  
Returning to the Workforce after an  
Absence  
Job Hopping  
Pre-Employment Testing
- 24. Session 10: Getting to a New Job in 60 Days  
60 Days to a New Job  
Summary  
Making the Plan Work for You  
Getting the Lead Out
- 25. Session 11: Goal Setting  
Creating a Plan  
Choosing Your References  
How References Work
- 26. Session 12: Thank You Notes  
Why Thank-You Notes Are Important  
Designing a Thank-You Note  
Crafting Your Message
- 27. Session 13: A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There
- 28. Summary
- 29. Recommended Reading List
- 30. Post-Course Assessment

# Creating a Google AdWords Campaign

## Course Overview

Many companies advertise with pay per click ads. This course focuses on the largest machine available: Google AdWords. In this course, participants will learn how Google AdWords work, what pay per click means, the importance of correctly setting an AdWord budget, how to select keywords and set up ad groups, how to design a compelling ad, and how to make adjustments to increase success.

## Learning Objectives

- Define Google AdWords and pay per click
- Set up keywords lists and groups
- Find tracking and statistical information
- Describe conversions from click throughs
- Decide whether you will write your own ads or enlist help

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Understanding AdWords Lingo
  - First Up, SEO
  - Getting To Know The Terms
  - How It Works
  - Pre-Assignment Review
  - AdWords Defined
  - Required Elements for an AdWords Campaign
  - How PPC Works
  - Making Connections
3. Session 3: Creating an AdWords Strategy
  - Planning
  - Research Your Market
  - Accessing the Keyword Tool
  - Using the Keyword Tool
  - Define Your Ideal Customer
  - Choosing Keywords
  - Bull's-Eye Keywords
  - Test Run
  - Take Two!
  - Getting Good with Keywords
4. Session 4: Creating a PPC Campaign
  - Phrase Matches
  - Exact Matches
  - Modified Broad Matches
  - Long Tail and Short Tail
  - Understanding Ad Groups
  - Sample Plan
  - Next Steps
  - Sample Keywords List
  - Remove Clutter
5. Session 5: Designing Your Ads
  - Setting Your PPC Budget
  - Making Connections
  - What is the Quality Score
  - Quality Score Breakdown
  - Increasing Your Score
  - Choosing Your Language
  - The Purpose of Your Ad
  - Persuasive Techniques
  - Predictability
  - Reciprocation
  - Consistency and Commitment
  - Social Evidence
  - Authority
  - Liking

- Scarcity
- Self-Interest
- Keeping Your Eyes Open
- Structuring your Ad
- Structuring Your Ad
- 6. Session 6: Looking at Success
  - Understanding Key Metrics
  - Conversion Rates
  - Higher Clickthrough Rates (CTR) Help
  - Cost Per Action Bidding
  - Setting Up Split Tests
- Using Google's Display Network (GDN)
  - Why Do You Need To Know About GDN
  - When to Ask for Help
  - To Be Continued
  - Case Study AdWords Express
- 7. Session 7: Personal Action Plan
  - Starting Point
  - Where I Want To Go
  - How I Will Get There
- 8. Summary
- 9. Recommended Reading List
- 10. Post-Course Assessment

## Creating a Positive Work Environment

### *Course Overview*

Not all of us have had the opportunity to work in a truly positive work environment. A positive work environment is important for the productivity of a company but it is also important to us personally. Our emotional and physical health can be improved by working in a positive work environment. We should wake up each morning wanting to go to work - not trying to think of excuses to not go. We want to be proud of where we work and enjoy telling others about where we work. As an employee or a leader within a company you have a responsibility to create and maintain a positive work environment. Everyone has a responsibility to create and maintain a positive work environment. Even if this is not a companywide reality you can seek to provide this type of environment for your department/ division or those within your sphere of influence. This course will give you tools to be able to create the type of company environment that you crave through building and nurturing effective workplace relationships.

### *Learning Objectives*

- Recognize what a positive workplace looks like
- Know and understand the key elements necessary to create and maintain a positive work environment
- Understand as an employee what you can do personally to create and maintain a positive work environment
- Understand as a leader the responsibility you have to create and maintain a positive work environment
- Discover what type of team player you are and how that relates to your functioning in the team
- Know the importance of effective workplace relationships in creating and maintaining a positive work environment
- Know and understand the importance of working as a team and guidelines to good teamwork
- Discover your personal strengths and weaknesses in working cooperatively
- Discover your preference for dealing with workplace conflict
- Learn and practice various methods to deal with workplace problems
- Learn some of the common meeting problems to how make your meetings more positive and effective

### *Course Outline*

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: What Does a Positive Environment Look Like?
  - Introduction
  - Characteristics of a Positive Work Environment
  - Work-Life Balance
  - Training and Development-Focused Recognition
  - Company as Team
3. Session 3: What Can I Do?
  - As an Employee
  - Making Connections
  - As a Leader
4. Session 4: Team Player
  - Team Member Roles and Responsibilities
  - Questionnaire
  - Team Member Roles and Responsibilities
5. Session 5 A: Effective Workplace Relationships
  - Teams
  - Team Experiences
  - Motivating Your Team
  - Working Cooperatively
  - Managing Conflict
  - What is a Conflict?
  - Self-Assessment
  - Preventing Problems
  - Dangerous Misconceptions
6. Session 5 B: Effective Workplace Relationships
  - Meeting Management
7. Session 6: Conclusion
  - Take Home Ideas
8. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
9. Course Summary
10. Recommended Reading List
11. Post-Course Assessment

# Creating a Top-Notch Talent Management Program

## Course Overview

Organizations recognize that they do better business when their people are engaged, motivated, and yes, talented. Having the right people in place at the right time is a key aspect to continued growth, success, or even just stability. This course will provide you with just what it takes to have the right people ready. It will help you create a program to measure the talents of your people and how to help them grow in preparation for the future. It will also help you support and grow your organization by teaching you how to apply the most current research and adapt your organization to the ever-changing marketplaces.

## Learning Objectives

- Apply the multifaceted aspects of talent management in your own organization
- Describe the skills required to manage high potential candidates
- Recognize and foster talent within an organization
- Explain the principles of competency-based management
- Use the language for talent management

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                             | Identifying Resources                              |
| Learning Objectives                                       | Understanding Employee Attitudes                   |
| Pre-Assignment  | Developing External Successors                     |
| Pre-Course Assessment                                     | Risk Assessment                                    |
| 2. Session 2: Understanding Talent Management             | Sample Risk Analysis Form                          |
| What is Talent Management?                                | Summary  |
| A Focused Effort to Manage Talent                         | 5. Session 5: Creating a Talent Management Plan    |
| 3. Session 3: Understanding Performance Management        | Overview   |
| The Differences Between Performance and Talent Management | Getting Prepared                                   |
| The Rake  | Homework Assignment                                |
| Shared Management Model Overview                          | The Vision Setting Meeting                         |
| About the Shared Management Model                         | 6. Session 6: About Competency Based Programs      |
| 4. Session 4: Understanding Succession Planning           | Understanding Competencies                         |
| Replacing vs. Succeeding                                  | Competency Clusters                                |
| Understanding Succession Planning Terms                   | What is a Competency Model?                        |
| Identifying Critical People                               | Model Overview                                     |
| Case Study  | The Role of Competency Models in Talent Management |
| Considering the Workplace                                 | 7. Session 7: Identifying Talent Key Talent Groups |



- High Performers
- High Potentials
- Successors
- Aren't Successors and High Potentials the Same Thing?
- Key Experts
- Missing Pieces
- Case Study: Smith Plumbing Inc.
- Organizational Chart
- Joe Smith
- Jane Smith
- Andrea Jones
- Jim Smith
- Melissa Smith
- Terry Andrews
- Questions
- Fast-Track Programs
- 8. Session 8: Bring on Bench Strength
  - Getting the Right Person for the Job
  - What Can You Do to Make Sure You Have the Best People Working for You?
  - Position Description Essentials
  - Why Are Position Descriptions Important?
  - Three Pillars
  - Orientation
  - Making Connections
  - Retention and Development
- 9. Session 9: Conducting Talent Assessments to Create a Talent Profile
  - A Three-Phase Process
  - Past Performance Review
  - Evaluation of Future Potential
  - Career Discussion
  - Recording Information
  - A Sample Form
  - Compiling the Results
  - Understanding the Grid
- 10. Session 10: Keeping People Interested
  - Key Attributes
  - Maslow's Classic Hierarchy of Motivational Needs
- Herzberg's Motivational versus Maintenance Factors
- Why Do You Think There Are So Many Theories on Motivation?
- Case Study: Jim's Job
- Questions
- Keeping Superstars from Falling
- Techniques for Success
- 11. Session 11: Talent Review Meetings
  - Structuring the Talent Review Meeting
  - Who should attend?
  - Why Is It Important?
  - What Should Be Covered?
  - A Manager's Role
  - Case Study
  - Following Up
- 12. Session 12: Show Me the Money!
  - Building Incentives into the Plan
  - Thinking Outside Dollars and Cents
  - About Competency-Based Pay and Pay-For-Performance
- 13. Session 13: Communicating with High Potentials
  - Building Your Communication Strategy
  - Advantages of Communicating Status
  - Disadvantages of Communicating Status
- 14. Session 14: Development Strategies
  - Goals with SPIRIT
  - Writing Tips
  - 360 Degree Feedback
  - Coaching and Mentoring
  - Creative Development Ideas
- 15. Session 15: Reality Check!
  - Making Connections
  - Tasks
- 16. Session 16: Fostering Engagement
  - Defining Engagement
  - Engagement Results
  - The Ten C's
- 17. Session 17: Evaluating the Plan
  - Why is Evaluation Necessary?
  - Evaluation Tools

Sample Evaluation  
Talent Management Program Evaluation  
Checklist  
Action Steps That Result From This  
Assessment

- 18. Session 18: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 19. Summary
- 20. Recommended Reading List
- 21. Post-Course Assessment

# Creating a Workplace Wellness Program

## Course Overview

Whether you are creating a workplace wellness program from scratch, or enhancing what you already have, you're already on the right track! With increasing costs of health care, a shrinking workforce, and aging workers, a savvy workplace understands the value in supporting workers to improve their conditioning and to live a fitter lifestyle. This course includes all aspects of designing or upgrading a program, from concept through implementation, to review.

## Learning Objectives

- Describe the necessity of workplace wellness programs
- Create program elements that reflect the needs of employees and the objectives of the organization
- Select program elements that fit the context of current operations
- Establish implementation and evaluation strategies

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview           | Reflection                                |
| Learning Objectives                     | 5. Session 5: Gathering Data              |
| Pre-Assignment                          | Gathering Data                            |
| Pre-Course Assessment                   | Challenges with Data                      |
| 2. Session 2: The Case for Wellness     | Other Ways to Measure                     |
| Benefits of Workplace Wellness Programs | Current Reality – Pre-Assignment Review   |
| Bottom Line Benefits                    | Making Connections (Part Two)             |
| Extending Beyond the Workplace          | Looking Around Us                         |
| Program Elements                        | Research Help                             |
| 3. Session 3: Building the Foundation   | Get Organized                             |
| Creating the Committee                  | Preview                                   |
| Sample Terms of Reference – ABC         | Ask                                       |
| Company Wellness Committee              | Read                                      |
| Making Connections                      | Summarize                                 |
| Outlining the Program                   | Evaluate                                  |
| Making Connections                      | 6. Session 6: Performing a Needs Analysis |
| Making Connections Answer               | The ICE Method                            |
| Gathering Resources                     | When is a Wellness Program Not            |
| Identifying Resources                   | Appropriate?                              |
| Gathering Resources                     | Underlying Issues                         |
| Cultural Elements                       | Three Steps                               |
| Questionnaire                           | The ICE Cycle                             |
| 4. Session 4: Gathering Support         | Isolating                                 |
| Taking Action                           | Consulting                                |

- Evaluating  
Making the Pitch
- 7. Session 7: Program Elements
  - Case Study One: From Sedentary to Sensational
  - Case Study Two: Smoking Cessation Program
  - Case Study Three: Nutrition Program
  - Case Study Four: Alcohol and Drug Program
  - Case Study Five: New Parent Program
  - Case Study Six: Flexible Work Hours Program
- 8. Session 8: Implementing Your Workplace Wellness Program
  - Implementation Options
  - Tips for Success
  - Identifying Motivators
- 9. Session 9: Reviewing the Plan
  - Evaluating Prior to Launch
  - Getting the Executive on Board
  - Getting Employees on Board
- 10. Session 10: Evaluating and Reporting
  - Results
  - Ratios and Statistics
  - Gathering Statistics
  - Understanding Ratios
  - Making it Count
- 11. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 12. Summary
- 13. Recommended Reading List
- 14. Post-Course Assessment

# Creating Successful Staff Retreats

## Course Overview

A staff retreat can evoke some pretty strong emotions. Dread of a week hanging around with people you would never invite home for dinner. Queasy thinking about throwing yourself backwards hoping your 'new friends' will catch you. However, staff retreats still continue even in hard times. Why? Many of the things we really need to get done take longer than the two hours you have in meeting time. As well, the retreat itself can bring about a change in approach not possible sitting in your boardroom for a meeting. This course will give you tools to be able to create staff retreats that are successful and help to bolster productivity, sales and positive workplace culture.

## Learning Objectives

- Discuss experiences with staff retreats
- Know the reasons why staff retreats are conducted
- Understand the main staff retreat undertakings categories
- Develop and present retreat activities
- Identify the critical elements for success of a staff retreat
- Develop a planning checklist
- Appreciate the keys to running a staff retreat
- Develop an evaluation questionnaire
- Recognize post-retreat activities that will ensure the continuing success of your staff retreats
- Realize your top three take home ideas for creating successful staff retreats

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                          | 4. Session 4: Designing a Staff Retreat |
| Learning Objectives                                    | Critical Elements for Success           |
| Pre-Assignment   | Staff Retreat Activities                |
| Pre-Course Assessment                                  | 5. Session 5: Running the Retreat       |
| 2. Session 2: Staff Retreats                           | Managing Expectations                   |
| Introduction   | Delegating                              |
| Why a Staff Retreat?                                   | Establishing Ground Rules               |
| Common Elements  | Creating Variety in the Schedule        |
| Goals of Staff Retreats                                | Capturing the Retreat Outputs           |
| 3. Session 3: Types of Undertakings at a Staff Retreat | Evaluating the Retreat                  |
| Undertakings   | 6. Session 6: Post-Retreat              |
| Developing Activities for Undertakings                 | Follow-up                               |
|  | Take Home Ideas                         |

7. A Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
8. Course Summary
9. Recommended Reading List
10. Post-Course Assessment

# Creating Winning Proposals

## Course Overview

Proposals are persuasive documents that are fundamental tools in organizational funding and output. This course will look at sources of funding, types of proposals and how to write proposals that will meet funding agencies requirements. This will include a number of tips and techniques to increase the potential success of your proposals. An important but often overlooked aspect of proposal writing will also be covered- Building and Maintaining Relationships. Relationships are built on honesty. Potential projects must be a good fit for your organization and your organization must be ready to do the work contained in the proposal. The most successful proposals are going to be those that fulfill the mission and values of your organization and that of the funding agencies as well!

## Learning Objectives

- Locate potential funders for your organizations on the Internet and use evaluative skills to identify the appropriateness of funding related to your own organization
- Explain the necessity of matching funders interests with organizational needs and use this knowledge in decisions about the validity of submitting a funding proposal
- Describe and understand the basic elements of proposal writing for not-for-profit organizations
- Describe and understand the basic process for successful proposal writing
- Analyze effective relationship-building strategies to engage with funders and use this knowledge in writing a funding proposal
- Describe at least five reasons why funding proposals can be rejected
- Plan, write and submit a proposal in response to funders guidelines

## Course Outline

- |                                   |                                    |
|-----------------------------------|------------------------------------|
| 1. Session 1: Course Overview     | Brainstorming Projects             |
| Learning Objectives               | Personal Proposal Funder Selection |
| Pre-Assignment                    | Potential Funder One               |
| Pre-Course Assessment             | Potential Funder Two               |
| 2. Session 2: Sources of Funding  | Potential Funder Three             |
| Trends in the Funding Environment | 4. Session 4: Types of Proposals   |
| Funders Brainstorming Activity    | Proposal Forms                     |
| Types of Funders                  | Letter Proposal                    |
| Sources of Funding Activity       | Partnership Proposals              |
| Potential Funders                 | Challenges                         |
| 3. Session 3: Funder Selection    | Minimizing the Challenges          |

5. Session 5: Proposals as a Relationship Builder
  - Portfolio Approach
  - Building the Relationship
  - Step One: Finding Each Other
  - Step Two: Getting to Know Each Other
  - Step Three: Do You Want to Connect?
  - Step Four: The First Date
  - Step Five: Going Steady
6. Session 6: RFPs/RFQs (Requests for Proposals or Request for Quote)
  - RFPs/RFQs (Requests for Proposals or Request for Quote)
  - RFP Case Study
7. Session Seven: The Ten Steps of Proposal Writing
  - The Ten Steps of Proposal Writing
  - Clarify Your Objectives
  - Analyze Your Audience
  - Get Your Thoughts on Paper
  - Group and Label Your Thoughts
  - Sequence Your Thoughts
  - Make an Outline
  - Write Your Draft Down
  - Edit
  - Add the Finishing Touches
  - Proofread and Edit
8. Session 8: Defining Your Proposal
  - 10 - Step Exercise
9. Session 9: Key Elements of a Proposal
  - Key Elements
10. Session 10: Defining the Needs and Desired Results
  - Defining the Need
  - Desired Results
11. Session 11: Resources and Activities and Evaluation
  - Resources
  - Activities
  - Evaluation
12. Session 12: Sustainability and Budget
  - Sustainability
  - Budget
  - Pricing Case Study
  - What Goes In the Proposal?
13. Session 13: Conclusion, Introduction, and Executive Summary
  - Conclusion
  - Introduction
  - Appendices
  - Executive Summary
  - Tool: Checklist Review
14. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
15. Summary
16. Recommended Reading List
17. Post-Course Assessment



# Creating Winning Webinars: Getting Your Message Out

## Course Overview

Webinars are now a common and effective tool being used by thousands and thousands of companies and people, across all industries. They are being used for everything from training to customer service, and education to marketing. Webinars are an affordable means of connecting with your staff, customers and online community.

This course will take you through the entire process of creating an effective webinar.

- Why and how to use Webinars
- Defining your webinar objectives
- Choosing the structure and content of your webinar
- Creating the outline
- Choosing the platform

This course will offer an introduction to Webinar Creation and provide you with a tool that is both appealing to you, the creator, and Webinar Attendees. With millions of webinars taking place online every month this is a medium to be embraced.

## Learning Objectives

- Understand what webinars are and why they are important to your workplace
- Implement best practices when developing and delivering webinars
- Choose appropriate structure and platform for your webinar
- Outline a webinar for your development and delivery

## Course Outline

- |                                      |   |
|--------------------------------------|---|
| 1. Session 1: Course Overview        | 5. Session 5: Creating the Outline                                |
| Learning Objectives                  | Creating the Outline  |
| Pre-Assignment                       | Webinar Creation Formula  |
| Pre-Course Assessment                | Webinars for Education and Collaboration with Staff or Colleagues |
| 2. Session 2: Webinars Defined       | 6. Session 6: Choosing the Platform                               |
| Introduction                         | Choosing the Platform   |
| What is a Webinar?                   | Webinar Platforms   |
| Pre-Assignment Review                | 7. A Personal Action Plan   |
| Why Use Webinars?                    | Starting Point  |
| 3. Session 3: Best Practices         | Where I Want to Go  |
| What Not to Do                       | How I Will Get There  |
| The Keys to Success                  | 8. Course Summary   |
| 4. Session 4: Choosing the Structure | 9. Recommended Reading List                                       |
| Choosing the Structure               | 10. Post-Course Assessment  |

# Creative Thinking and Innovation

## Course Overview

Being able to think creatively and develop innovative solutions can have big benefits at work and at home. There are some skills that you can develop and tools that you can learn about that will help you get ahead of the game.

## Learning Objectives

- Identify the difference between creativity and innovation
- Recognize your own creativity
- Build your own creative environment
- Explain the importance of creativity and innovation in business
- Apply problem-solving steps and tools
- Use individual and group techniques to help generate creative ideas
- Implement creative ideas

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                                  | The Role of Creativity and Innovation in Business                             |
| Learning Objectives  |   |
| Pre-Assignment   | The Birth of the Four Seasons: A Case Study                                   |
| Pre-Course Assessment  | Discussion Questions  |
| 2. Session Two: What are Creativity and Innovation?              | 7. Session Seven: Where Does Creativity Fit Into the Problem-Solving Process? |
| Defining the Terms   | The Problem-Solving Model   |
| What Am I?   | Another Perspective for Creative Problem-Solving                              |
| Know Your Creative Potential                                     | Keeping an Open Mind  |
| 3. Session Three: Individual Creativity                          | Solving Problems the “Right” Way  |
| Know Yourself  | Phase One   |
| Tips for Increasing Your Individual Creativity                   | Phase Two   |
| Boost Your Creative Juices                                       | Phase Three   |
| 4. Session Four: Get Creative                                    | 8. Session Eight: Defining the Problem  |
| Pre-Assignment Review  | Problem Identification  |
| 5. Session Five: Developing the Right Environment for Creativity | Finding the Root of a Problem   |
| What Does a Creative Environment Look Like?                      | Eight Essentials to Defining a Problem  |
| Tips for Building Your Own Creative Environment                  | Tie It All Together   |
| Build Your Creative Environment                                  | Using the Power of Eight  |
| 6. Session Six: Creativity and Innovation in Business            | 9. Session Nine: Creative Techniques  |
|  | The RAP Model   |
|  | Case Study  |
|  | Summary   |
|  | The Shoe Swap Technique   |

- Walk A Mile
- Using Mind Mapping
- Creating a Mind Map
- Map It Out!
- Defining Metaphors and Analogies
- Using Metaphors and Analogies to Express Ideas
- Make a Metaphor
- Situation/Solution Reversal
- Case Study
- Reverse It to Solve It
- The Nine Intelligences
- 10. Session Ten: Encouraging Creativity in a Team
  - Brainstorming
  - Creating Ground Rules
  - Individual Brainstorming
  - Plan It Out!
- Rolestorming
- Case Study
- Act It Out!
- The Stepladder Technique
- Stepladder Model
- Brainwriting
- The Slip Writing Technique
- The Crawford Slip Writing Technique Model
- 11. Session Eleven: Putting It All Together
  - Nancy Clue and the Case of the Software Upgrade
  - Create Ideas and Choose Your Solution
- 12. Personal Action Plan
- 13. Course Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment

# Creativity In The Workplace

## Course Overview

Creative thinking in the workplace is in demand. We live in a competitive society and creativity improves productivity, teamwork, and innovation.

## Learning Objectives

- Define creativity
- Identify the characteristics of a creative person
- Develop your creativity
- Understand the importance of creativity in the workplace
- Identify the benefits of creativity in the workplace
- Examine creative corporate cultures
- Foster creativity in the workplace
- Apply brainstorming techniques

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: What is Creativity?
  - Two Myths of Creativity
  - Myths of Creativity
  - Ten Characteristics of Creative People
  - Self-Reflection Exercise
  - How Can You Develop Your Creativity?
  - Lateral Thinking Puzzle
3. Session Three: The Importance of Creativity in The Workplace
  - What Do CEOs Think?
  - 30 Circles Challenge
  - Benefits of Creativity in the Workplace
  - Creative Companies
4. Session Four: Creative Corporate Cultures
  - Examples of Corporate Creativity
  - How Does My Business Compare and How Can It Improve?
5. Session Five: Fostering Creativity in Your Workplace
  - Fostering Creativity
  - Ideas to Help Employers Bolster Creativity
  - Creative Challenge
  - Workplace Scenario
6. Session Six: Brainstorming Techniques
  - Definition of Brainstorming
  - Visual Brainstorming Techniques
  - Idea Sorting Techniques
  - Creative Brainstorming Games and Exercises
  - Brainstorming Activity
  - Six Hats Brainstorming Technique
  - Six Hats Brainstorming Activity
7. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
8. Recommended Reading List
9. Post-Course Assessment

# Crisis Management

## Course Overview

Viable organizations need to be ready for emergencies because they are a fact of doing business. The worst plan is not to have any kind of plan at all, and the best plans are tested and adjusted so that they work over time. Fortunately, you do not need separate plans for fire, weather disasters, and all the different kinds of crises that can occur. One solid plan will help you to prevent, respond, and recover from all crises. This course will help you ensure your organization is ready to manage any kind of crisis.

## Learning Objectives

- Assign people to an appropriate crisis team role
- Conduct a crisis audit
- Establish the means for business continuity
- Determine how to manage incidents
- Help your team recover from a crisis
- Apply the process in practical exercise

## Course Outline

1. Session 1: Course Overview  
Learning Objectives  
Pre-Assignment  
Burst Water Pipe  
Call Center  
Pre-Course Assessment
2. Session 2: What is Crisis Management?  
Defining Terms  
What Makes a Crisis?  
The Crisis Management Team  
Creating the Team
3. Session 3: Training Leaders and Staff  
Training Essentials  
Three Pronged Approach  
Conducting Training
4. Session 4: Conducting the Crisis Audit  
Why Audit?  
Documentation Audit  
360 Degree Audit  
Online Audit  
Sample Audit Questions  
Other Audit Considerations  
Using a Risk Matrix
5. Session 5: Performing a Risk Level Analysis  
The Four Categories  
Case Study
6. Session 6: Developing a Response Process  
Pre-Assignment Review  
Crisis Response Process  
Step Two: Perform Basic Crisis Management Steps  
Step Three: Trigger the Crisis Response Process (If Appropriate)  
Remember: Stay Flexible!
7. Session 7: Consulting with the Experts  
Considering Your Resources  
Making Connections
8. Session 8: Incident Management  
Techniques  
Case Study  
Responding to Incidents  
Incident Related Documentation  
Other Documents  
Investigating Incidents  
Accident Investigation Kit  
Steps to Follow

9. Session 9: Working Through the Issues
  - Model Overview
  - The Problem Solving Model
  - Keeping an Open Mind
  - Solving Problems the Right Way
  - Phase One
  - Definition
  - Analysis
  - Phase Two
  - Brainstorming
  - Checkerboard
  - Research and Report
  - Phase Three
  - Solution Planning Worksheet
  - Three Types of Decisions
  - Advice from an Expert
  - Eight Ingredients for Good Decision Making
10. Session 10: Establishing an Emergency
  - Operations Center
  - EOC Considerations
  - Making Connections
  - Who is In Charge?
11. Session 11: Building Business Continuity and Recovery
  - Creating Continuity
  - Making Connections
  - Essential Crisis Plan Elements
12. Session 12: Walliialia
  - Background
  - Exercise One: Gas Line Explosion at Water Plant
  - Assignment
  - Assignment
  - Exercise Two: How are you Feeling?
  - Assignment
  - Exercise Three: The Last Question
  - Assignment
13. Session 13: Recovering and Moving On
  - Initial Adjustments
  - Working Things Out
14. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
15. Summary
16. Recommended Reading List
17. Post-Course Assessment

## Critical Elements of Customer Service

### Course Overview

While many companies promise to deliver an incredible customer experience, some are better at supplying this than others. This course is designed around six critical elements of customer service that, when a company truly embraces them, bring customers back to experience service that outdoes the competition.

### Learning Objectives

- Understand what a customer service approach is
- Understand how your own behavior affects the behavior of others
- Demonstrate confidence and skill as a problem solver
- Apply techniques to deal with difficult customers
- Know how to provide excellent customer service

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview           | The First Critical Element – A Focus on         |
| Learning Objectives                       | Customer Service                                |
| Pre-Assignment                            | 6. Session Six: The Second Critical Element –   |
| Pre-Course Assessment                     | Procedures                                      |
| 2. Session Two: What is Customer Service? | What are Our Standards?                         |
| What is Customer Service?                 | Drafting Standards                              |
| Who Are Your Customers?                   | Making Connections                              |
| Meeting Expectations                      | 7. Session Seven: The Third Critical Element –  |
| 3. Session Three: Pre-Assignment Review   | Culture   |
| Pre-Assignment Review                     | What Do You Think?                              |
| Making Connections                        | Creating a Customer Service Culture             |
| 4. Session Four: Setting Goals            | Quiz  |
| Creating a Personal Values Statement      | 8. Session Eight: The Fourth Critical Element – |
| Step One: Identify Your Values            | Problem-Solving                                 |
| Step Two: Define Your Values              | Seven Steps to Customer Problem Solving         |
| Step Three: Put It All Together           | Making Connections                              |
| Identifying and Setting Goals             | 9. Session Nine: The Fifth Critical Element –   |
| Identifying Your Goals                    | Measurement                                     |
| Our Values Statement                      | Tools to Use                                    |
| What is a SMART Goal?                     | Measurement in Practice                         |
| How to Create a SMART Goal Statement      | 10. Session Ten: The Sixth Critical Element –   |
| Making Connections                        | Reinforcement                                   |
| 5. Session Five: The Critical Elements of | Reinforcement Techniques                        |
| Customer Service                          | Developing and Maintaining Relationships        |
| Six Elements of Customer Service          | Recognizing the Power of Your Behavior          |
|   | Likeability Works                               |

- 11. Session Eleven: Communication Skills
  - Defining Communication
  - Body Language Basics
  - Voice
  - Asking Questions
  - Empathy
  - Dangerous Misconceptions
  - Power Talk
  - How to Feel Powerful in Your Position
  - Basics of Good Communication
- 12. Session Twelve: Telephone Techniques
  - Telephone Basics
  - Handling Everyday Requests
  - Taking a Message
  - Tips and Tricks
- 13. Session Thirteen: Dealing With Difficult Customers
  - Reducing Conflict
  - When Discussions Degenerate into Conflict
  - Caller Behavior
- 14. Session Fourteen: Dealing With Challenges
  - Assertively
  - An Assertiveness Model
  - An Assertiveness Model Example
  - Dealing With Challenges
- 15. Session Fifteen: Dealing With Difficult People
  - Getting to the Heart of the Matter
  - What is Missing?
  - The Three F's
  - Serving Difficult People
  - The Recovery Process
- 16. Session Sixteen: Reflective Practice
  - Conducting a Reflection
  - Reflections
  - Reflective Diary
  - Reflective Questions
- 17. Session Seventeen: Dealing With Stress
  - About Stress
- 18. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 19. Course Summary
- 20. Recommended Reading List
- 21. Post-Course Assessment



# Critical Thinking

## Course Overview

In today's world, having the ability to clearly reason through problems and to present arguments in a logical, compelling way has become a key skill for survival.

## Learning Objectives

- Define critical and non-critical thinking
- Identify critical thinking style(s), including areas of strength and improvement
- Describe other thinking styles, including left/right brain thinking and whole-brain thinking
- Work through the critical thinking process to build or analyze arguments
- Develop and evaluate explanations
- Improve key critical thinking skills, including active listening and questioning
- Use analytical thought systems and creative thinking techniques
- Prepare and present powerful arguments

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                            | Case Studies                                     |
| Learning Objectives  | Identifying the Arguments                        |
| Pre-Assignment   | Identifying the Arguments                        |
| Pre-Course Assessment                                      | Clarifying the Issues and Arguments              |
| 2. Session Two: Understanding Critical Thinking            | Establishing Context                             |
| What is Critical Thinking?                                 | Checking Credibility and Consistency             |
| A Closer Look  | Case Study: Changing Cafeteria Offerings         |
| Glossary   | Evaluating Arguments                             |
| Characteristics of a Critical Thinker                      | Case Study                                       |
| Common Critical Thinking Styles                            | Critical Thinking Worksheet                      |
| Making Connections   | 6. Session Six: Critical Thinking Mindset        |
| 3. Session Three: Where Do Other Types of Thinking Fit In? | Answering Questions Activity                     |
| Left- and Right-Brain Thinking                             | 7. Session Seven: A Critical Thinker's Skill Set |
| Whole-Brain Thinking                                       | Asking Questions                                 |
| 4. Session Four: Pitfalls to Reasoned Decision Making      | Closed Questions                                 |
| Getting Over the Barriers                                  | Probing Techniques                               |
| Defining Pitfalls to Critical Thinking                     | Pushing My Buttons                               |
| 5. Session Five: The Critical Thinking Process             | Critical Thinking Questions                      |
| The Critical Thinking Model                                | Active Listening Skills                          |
| The Standards of Critical Thinking                         | Responding to Feelings                           |
| Identifying the Issues                                     | Reading Cues                                     |
|  | Demonstration Cues                               |
|  | Tips for Becoming a Better Listener              |

- 8. Session Eight: Creating Explanations
  - Defining Explanations
  - Mini Case Study
  - Argument or Explanation?
  - Steps to Building an Explanation
  - Gathering Information
  - Processing Information
  - Developing Hypotheses
  - Testing Hypotheses
  - Making Connections
  - Questions
- 9. Session Nine: Dealing with Assumptions
  - What is an Assumption?
- 10. Session Ten: Critical and Creative Thought Systems
  - Techniques for Thinking Creatively
  - Limitations of Brainstorming
  - Brainwriting
  - More Methods
  - Creative Thinking Exercise
- 11. Session Eleven: Putting It Into Practice
  - Presenting and Communicating Your Ideas to Others
  - Pre-Assignment Preparation
  - Presentations
- 12. Personal Action Plan
- 13. Course Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment

# CRM: An Introduction to Customer Relationship Management

## Course Overview

This course will introduce Customer Relationship Management (CRM) and explore how CRM can be integrated within an organization.

As with many significant undertakings, undergoing a CRM review (even simply considering its implementation) requires learners to analyze technical and complicated systems. This course provides a basic understanding of CRM to help business leaders determine if a CRM system is the best fit for their organization. They will learn advantages to using CRM, how to assess readiness, and important considerations for implementation.

## Learning Objectives

- Explain Customer Relationship Management (CRM) and its purpose.
- List the benefits of using a CRM system in a business.
- Conduct a CRM readiness assessment for their own organization.
- Develop a plan for successful implementation of a CRM system.
- Recognize the different types of CRM systems and understand how to determine the best type for a particular organization.
- Understand the questions to ask when selecting a CRM tool.
- Determine what data should be collected for their organization's CRM system and understand the ethics of data collection.
- Use metrics and key performance indicators to measure and evaluate the success of a CRM program.
- Name some of the ways artificial intelligence can be used in CRM systems, as well as some of the potential issues that could arise from the use of AI.

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                     | Preparing to Implement CRM                             |
| Learning Objectives                                 | Case Study: Legend                                     |
| Pre-Assignment                                      | Best Practices   |
| Pre-Course Assessment                               | 6. Session Six: Determining the Type of CRM System     |
| 2. Session Two: What is CRM?                        | Types of CRM Systems                                   |
| Customer Relationship Management in Everyday Life   | 7. Session Seven: Considerations in CRM Tool Selection |
| CRM Value   | How to Choose a CRM Platform                           |
| 3. Session Three: Benefits of CRM                   | Technical Requirements                                 |
| Advantages of Using CRM                             | Making Connections                                     |
| 4. Session Four: How to Determine Readiness for CRM | 8. Session Eight: Data Collection                      |
| Readiness Questionnaire                             | What Data to Collect and How to Collect It             |
| 5. Session Five: How to Implement CRM               |  |

- Privacy Issues
- 9. Session Nine: Loyalty Programs
  - What is a Loyalty Program?
- 10. Session Ten: Evaluating and Reviewing a CRM Program
  - Evaluating and Reviewing CRM
- 11. Session Eleven: CRM and AI
  - Artificial Intelligence
- 12. A Personal Action Plan
- 13. Course Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment

## Cybersecurity 1: Fundamentals for Employees

### Course Overview

Fighting against cybercrime is a constant and expensive endeavor. Without a trained and vigilant staff the effort will not be successful. That training needs to start now and its benefits will be seen through the reduction of successful cyberattacks.

### Learning Objectives

- Understand the history and the current state of cyberattacks in terms of quantity and cost to business
- Name and explain the methods used in various types of cyberattacks
- Outline the risk of human error in inadvertently contributing to the success of cyberattacks
- Have an appreciation of company-wide measures to protect against cyberattacks and their role in the success of these defense measures
- Explain the importance of a company culture that focuses on cybersecurity to successfully defend against attacks
- Realize the social media mining activities of cyber criminals and be better able to practice safe social media behavior
- Outline the information needed in a social media security policy
- Understand and practice good security behaviors when working remotely or travelling
- Recognize phishing attacks by identifying the subtle clues that are present in all phishing attacks
- When a cyberattack has been successful, understand what steps to take to mitigate the effect
- Create a personal cybersecurity plan

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview         | 4. Session Four: Role of Human Error         |
| Learning Objectives                     | The Role of Human Error                      |
| Pre-Assignment                          | Opening Email                                |
| Pre-Course Assessment                   | 5. Session Five: What Can a Company Do?      |
| 2. Session Two: The State of Cybercrime | Company-wide Defenses                        |
| History of Cybercrime                   | Other Company-wide Defenses                  |
| Recalling Cybercrimes                   | Focus on Social Media                        |
| Historical Examples of Cybercrime       | How it Can Work                              |
| Cost of Cybercrime                      | Create a Social Media Policy                 |
| Cybercrime Circumstances                | 6. Session Six: Best Practices for Remote or |
| 3. Session Three: Types of Cyberattacks | Travelling Employees                         |
| Types of Attacks                        | Out of Office Protections                    |

7. Session Seven: Scenarios
  - Scenario: Malware
  - Scenario: Potential Data Breach
8. Session Eight: Cyberattacks on Individuals
  - Cyberattacks to Obtain Sensitive Information
  - Malware (Malicious Software)
  - Social Media
  - Social Media Scams
9. Session Nine: Recognizing Phishing Attacks
  - The Giveaway Clues to Phishing Attacks
  - Spot the Clue
  - Email One
  - Email Two
  - Email Three
  - Phishing Emails
10. Session Ten: What Can a Person Do?
  - Supporting Company Efforts
  - Social Media
  - Focus on Spear Phishing
  - How to Protect the Organization
  - Social Media Safety
11. Session Eleven: Creating a Personal Cybersecurity Plan
  - Cybersecurity Starts with You!
12. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
13. Course Summary
14. Recommended Reading List
15. Post-Course Assessment

# Dealing With Difficult People

## Course Overview

In this course you will learn how to manage situations involving difficult people at work, through lessons that include the benefits of confrontation, how to prevent problems, using emotional intelligence, how to manage anger, causes of difficult behavior, and a three-step conflict resolution model.

## Learning Objectives

- Recognize how your own attitudes and actions affect others
- Find new and effective techniques for dealing with difficult people
- Learn some techniques for managing and dealing with anger
- Develop coping strategies for dealing with difficult people and difficult situations

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Conflict as Communication
  - Understanding Conflict
  - Do We Have To Fight?
  - What is A Conflict?
  - How About Avoidance?
  - Self-Assessment
  - Initiating the Move
3. Session Three: Benefits of Confrontation
  - To Talk or Not to Talk
  - Determining Your Involvement
  - Reciprocal Relationships
  - Pre-Assignment Review
  - Improving Relationships
4. Session Four: Preventing Problems
  - The Importance of Empathy
  - Dangerous Misconceptions
  - Active Listening
5. Session Five: Emotional Intelligence
  - The Six Seconds Model
  - Identify Emotions
  - Understand and Manage
  - Use and Communicate
6. Session Six: Getting Focused
  - Getting to the Heart of the Matter
  - What is Missing?
  - The Three F's
7. Session Seven: Managing Anger
  - Coping Strategies
  - Expressing Anger
  - Dealing with Other People's Anger
  - Guidelines for Assertive Anger
8. Session Eight: Dealing with Problems
  - Dealing with Problems
  - Working With the Suggestions
  - Explaining the Suggestions
  - Causes of Difficult Behavior
  - The Difficulty of Others
  - Dealing with Others
9. Session Nine: The Three-Step Conflict Resolution Model
  - The Three-Step Model
  - Step 1: Research
  - Step 2: Presentation
  - Step 3: Take Action
  - Getting the Hang of Things
10. Session Ten: Practice, Practice, Practice
  - Planning: Step 1 - Research
  - Planning: Step 2 - Presentation
  - Planning: Step 3 - Take Action

- 11. Session Eleven: Changing Yourself
  - Negative vs. Positive Interactions
  - Negative Interaction
  - Positive Interaction
  - Take the Wheel!
  - Walking Away
  - Your Organization
  - Dealing with Negative Feelings
- 12. Session Twelve: Why People Do Not Always Do What They Are Supposed To
  - The Big Question
  - Answering the Question
- 13. Session Thirteen: De-Stress Options to Use When Things Get Ugly
  - De-Stress Options
  - General Coping Thoughts When Things Get Messy
- 14. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 15. Course Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment



# Delegation: The Art of Delegating Effectively

## Course Overview

Effective delegation is one of the most valuable skills you can master. It reduces your workload and develops employee skills. Delegating prepares employees who work for you to be able to handle your responsibilities and simultaneously allows you to advance to other career opportunities within your organization.

Delegation is often one of the hardest skills for a manager to master. However, the skill can be learned. This course will explore many of the facets of delegation, including when to delegate and whom to delegate to. We will also go through the delegation process step by step and learn about techniques to overcome problems.

## Learning Objectives

- Clearly identify how delegation fits into your job and how it can make you more successful
- Identify different ways of delegating tasks
- Use an eight-step process for effective delegation
- Give better instructions for better delegation results
- Recognize common delegation pitfalls and how to avoid them
- Monitor delegation results
- Give effective feedback

## Course Outline

- |                                   |  |
|-----------------------------------|--|
| 1. Session 1: Course Overview     | 4. Session 4: Pre-Assignment Review    |
| Learning Objectives               | Pre-Assignment Review                  |
| Pre-Assignment Background         | 5. Session 5: Picking the Right Person |
| Pre-Course Assessment             | Demonstrated Skill                     |
| 2. Session 2: Why Delegate?       | Employee Motivation                    |
| Advantages and Disadvantages of   | Matching Skills and People             |
| Delegating                        | 6. Session 6: The Delegation Meeting   |
| More on Delegation                | Delegation Assignment Steps            |
| Delegation Do's and Don'ts        | 7. Session 7: Putting it into Practice |
| Self-Assessment                   | Case Study                             |
| 3. Session 3: What is Delegation? | Activity                               |
| Delegation Definitions            | Steps for a Delegation Meeting         |
| Four Basic Steps to Delegation    | 8. Session 8: Giving Instructions      |
| Levels of Delegation              | Three Types of Instructions            |
| Breaking Down the Model           | Requests                               |
| Guidelines for Success            | Suggestions                            |
| What to Delegate                  | Preparing Instructions                 |
| Lateral Delegation                |  |

- 9. Session 9: Monitoring Delegation
  - Why Should You Monitor Delegation?
  - How Do You Monitor?
- 10. Session 10: Practicing Delegation
  - Decision One
  - Your Employees
  - How Do You Monitor?
  - Decision Two
  - Decision Three
  - Decision Four
  - Decision Five
- 11. Session 11: Giving Feedback
  - The Ingredients of Good Feedback
  - Characteristics of Effective Feedback
  - Case Studies
- 12. Session 12: Becoming a Good Delegator
  - Characteristics of Effective Delegators
- 13. Session 13: A Personal Action Plan
  - Starting Point
  - Short-Term Goals and Rewards
  - Long-Term Goals
- 14. Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment

## Delivering Dynamic Virtual Presentations

### Course Overview

Managing the virtual workplace isn't as scary as it sounds. A lot of the basics of management (including communicating with others, managing performance, building teams, and leading meetings) are the same. This course will cover the differences and give you the skills that you need to successfully lead the virtual workplace.

### Learning Objectives

- Explain the differences between virtual and in-person presentations
- Outline the major challenges (presenter, presentation and technical) with virtual presentations
- Recognize the strengths, weaknesses, and standout features of popular virtual presentation platforms (Zoom, MS Teams, GoToMeeting and Google Meet) and how to set up an account on the platforms.
- Integrate solutions to virtual presentation challenges in your own delivery of virtual presentations

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview   | Etiquette  |
| Learning Objectives   | Etiquette Reminder Email   |
| Pre-Assignment  | Hospitality  |
| Pre-Course Assessment   | Considering a Virtual Presentation Team                            |
| 2. Session Two: Why Virtual Presentations and Meetings?                   | 6. Session Six: Virtual Presentation Essentials – The Presentation |
| Working From Home   | Presentation Tools   |
| Virtual Meeting Experiences   | Presentation Challenges  |
| Types of Presentations  | Using Breakout Rooms for Small Groups                              |
| 3. Session Three: How are Virtual Presentations Different from In-Person? | Engaging All Participants  |
| Delivering a Presentation Virtually                                       | What to Do After the Presentation                                  |
| 4. Session Four: Virtual Presentation Challenges                          | 7. Session Seven: Virtual Presentation Essentials – The Technology |
| Connecting Virtually  | Avoiding Technical Difficulties                                    |
| Remote Meetings – What are People Really Doing?                           | 8. Session Eight: The Tools – Zoom                                 |
| Other Challenges and Solutions  | Overview   |
| 5. Session Five: Virtual Presentation Essentials – The Presenter          | Key Features   |
| The Presenter   | Setting Up an Account  |
| Presenter Challenges Activity   | Strengths and Weaknesses   |
| Presenter Challenges  | Zoom Standout Features   |
|   | 9. Session Nine: The Tools – Microsoft Teams                       |
|   | Overview   |
|   | Key Features   |

- |   |                                       |
|---|---------------------------------------|
| Setting Up an Account                       | Setting Up an Account                 |
| Strengths and Weaknesses                    | Strengths and Weaknesses              |
| Microsoft Teams Standout Features           | Google Meet Standout Features         |
| 10. Session Ten: The Tools – GoToMeeting    | 12. Session Twelve: Capstone Activity |
| Overview                                    | Deliver a Virtual Presentation        |
| Key Features                                | 13. Personal Action Plan              |
| Setting Up an Account                       | Starting Point                        |
| Strengths and Weaknesses                    | Where I Want to Go                    |
| GoToMeeting Standout Features               | How I Will Get There                  |
| 11. Session Eleven: The Tools – Google Meet | 14. Course Summary                    |
| Overview                                    | 15. Recommended Reading List          |
| Key Features                                | 16. Post-Course Assessment            |

# Design Thinking: An Introduction

## Course Overview

Designing Thinking can give you the edge you need to create effective customer solutions for products and services. With its emphasis on understanding the customer and testing throughout the entire process cycle you can be ensured of greater success.

## Learning Objectives

- Use Design Thinking to solve problems more creatively
- Understand problems from the customer's perspective
- Apply different brainstorming techniques to identify innovative ideas
- Use effective design research
- Understand the value of creating prototypes to test your ideas
- Keep your design ideas moving forward

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Introduction to Design Thinking
  - Benefits of Design Thinking
  - Design Thinking in a Nutshell
  - Design Thinking Phases
  - Real-world Design Thinking Examples
  - Work-based Thinking
3. Session Three: Empathize
  - What is Empathy?
  - Traits of Empathetic People
  - Empathy Mapping
  - Types of Questions
  - Empathy Map Example
  - Creating an Empathy Map
4. Session Four: Define
  - Developing a Point of View
  - Developing a Persona
  - Defining Your Users
  - Defining Your Questions
  - Work-based Design Thinking “HMW”
5. Session Five: Ideation Part 1 — Ideas and Potential Solutions
  - Methods for Ideation: Brainstorming
  - Limitations of Brainstorming
  - Methods for Ideation: Brain Writing
  - Using Your “How Might We” Questions
  - More Methods
  - Using Various Idea Generation Methods
  - Making Connections
  - Tips
  - Selecting the Best Idea
  - Solution 1: Pluses, Potentials, Concerns
  - Solution 2: NAF Technique
  - Solution 3: Visualization
  - Solution 4: Questions
  - Making Connections
6. Session Six: Ideation Part 2 — Journey Mapping
  - Developing a Journey Map
  - Buying an Online App Journey Map
  - Journey Mapping
7. Session Seven: Prototyping and Testing
  - Prototyping and Testing
  - Prototyping

Prototype Brainstorming  
Testing  
User Testing Methods  
Testing Prototypes

8. Personal Action Plan
9. Course Summary
10. Recommended Reading List
11. Post-Course Assessment

# Developing a High Reliability Organization

## Course Overview

Today's world is full of the unexpected. System failures, terrorism events, disease outbreaks, and superstorms disrupt businesses every day, sometimes to an unrecoverable point. Despite these challenges, some services (such as power plants, hospitals, and airports) have no choice but to continue operating.

This course will explore how these organizations maintain high reliability even in times of serious crisis and stability. We will share their secrets in a way that can be applied to all organizations in order to create high reliability and continued success.

## Learning Objectives

- Define the characteristics of a high reliability organization
- Define key concepts required for high reliability, including mindfulness and expectations
- Describe the five principles governing high reliability organizations: preoccupation with failure, resistance to simplification, sensitivity to operations, commitment to resilience, and deference to expertise
- Audit activities at all stages to assess the business' reliability

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                          | 4. Session 4: The Anticipation Principles   |
| Learning Objectives                                    | Preoccupation with Failure                  |
| Pre-Assignment   | Case Study                                  |
| Preoccupation with Failure                             | Making Connections                          |
| Resistance to Simplification                           | Resistance to Simplification                |
| Sensitivity to Operations                              | Case Study                                  |
| Commitment to Resilience                               | Making Connections                          |
| Deference to Expertise                                 | Sensitivity to Operations                   |
| Pre-Course Assessment                                  | Case Study                                  |
| 2. Session 2: What is a High Reliability Organization? | Making Connections                          |
| High Reliability Organizations                         | 5. Session 5: The Containment Principles    |
| Links in the Chain                                     | Commitment to Resilience                    |
| HRO Principles   | Case Study                                  |
| 3. Session 3: Key Concepts                             | Making Connections                          |
| Expectations, Normalization, and Mindfulness           | Deference to Expertise                      |
| Normalization  | Case Study                                  |
| Mindfulness  | Making Connections                          |
| Making Connections                                     | 6. Session 6: Auditing for High Reliability |
| Case Study   | Auditing Techniques                         |
|  | Churchill's Four Questions                  |
|  | Making Connections                          |

- Sample Audit Questions
- 7. Session 7: Test Driving
  - Case Study
  - Task
- 8. Session 8: A Personal Action Plan

- Starting Point
  - Where I Want to Go
  - How I Will Get There
- 9. Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment



# Developing a Lunch and Learn Program

## Course Overview

Lunch and learn programs are a venue to foster sharing and peer learning and are typically aimed at fostering cross-organization collaboration and communication. They are a tool for sharing information, approaches, and talent. Further, they offer opportunities for networking in a safe, friendly, and relaxed atmosphere. This course will provide tools to be able to create a lunch and learn program that creates opportunities for learning that might not otherwise happen. Participants will also prepare a short lunch and learn program session and receive feedback from other course participants.

## Learning Objectives

- Explain the benefits of implementing a lunch and learn program
- Outline the aims and expectations of a lunch and learn program for their organization
- Utilize a number of success factors to create a lunch and learn program for their organization
- Develop a promotion plan for their organization's lunch and learn program
- Develop a list of potential lunch and learn program session topics
- Maintain an ongoing lunch and learn program for their organization
- Develop and deliver a lunch and learn program session

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview                                 | Topics for a Lunch and Learn Program          |
| Learning Objectives   | Session                                       |
| Pre-Assignment  | 4. Session Four: Ongoing Administration of a  |
| Pre-Course Assessment   | Lunch and Learn Program                       |
| 2. Session Two: So, What is a Lunch and Learn Program?          | Administrator Responsibilities                |
| Introduction  | Lunch and Learn Program Administration        |
| Why Have a Lunch and Learn Program?                             | 5. Session Five: Developing a Lunch and Learn |
| 3. Session Three: The Underpinnings of Lunch and Learn Programs | Presentation                                  |
| Aims and Expectations   | Critical Elements for Success                 |
| Aims  | Presentation Skills                           |
| Expectations  | Overcoming Nervousness                        |
| Lunch and Learn Program Framework                               | Presentation Skills                           |
| How to Start a Lunch and Learn Program                          | Presentation Skills Sharing                   |
| Creating a Successful Lunch and Learn                           | Building Your Presentation                    |
| Program Promotion   | Body  |
| Promotion Planning  | Conclusion                                    |
|   | 6. Session Six: Presentations                 |
|   | Presentations                                 |
|   | Presentation Evaluation                       |

7. Personal Action Plan
8. Course Summary
9. Recommended Reading List

10. Post-Course AssessmentPost-Course  
Assessment

# Developing a Safety Procedures Manual

## Course Overview

Safety procedures are an important part of an effective workplace safety program. In this course, learn how to develop and write safety procedures for your workplace safety manual.

## Learning Objectives

- Develop a safety procedure template
- Develop a flowchart to accurately depict process activities
- Use brainstorming to gather necessary information for safety procedure creation
- Understand a variety of procedure types (Step-by-Step, Playscript, Decision Tree, Decision Tables)
- Write and revise Step-by-Step safety procedures
- Add communication elements to safety procedures

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview            | 6. Session Six: Procedure Writing            |
| Learning Objectives                        | Keep it Simple                               |
| Pre-Assignment                             | Guidelines for Writing Procedures            |
| Pre-Course Assessment                      | 7. Session Seven: Honing the Draft Procedure |
| 2. Session Two: Setting the Stage          | Describing Actions Accurately                |
| Policies and Procedures                    | Communication Aids                           |
| 3. Session Three: Safety Procedures Basics | 8. Session Eight: Some Other Methods         |
| Safety Procedures                          | Step-by-Step Procedures                      |
| Developing Safety Procedures               | Playscript                                   |
| Developing a Safety Procedure Template     | Decision Trees                               |
| 4. Session Four: Flowcharting              | Decision Tables                              |
| Organizing the Steps in the Procedure      | Writing a Procedure                          |
| How to Construct a Flowchart               | 9. Session Nine: Procedures Building         |
| Flowchart Musts                            | Writing Safety Procedures                    |
| Flowchart Examples                         | 10. Personal Action Plan                     |
| 5. Session Five: Gathering Information     | 11. Course Summary                           |
| Gathering Information                      | 12. Recommended Reading List                 |
| Brainstorming                              | 13. Post-Course Assessment                   |
| Challenges of Brainstorming                |  |

## Developing a Training Needs Analysis

### Course Overview

Your ability to create an analysis that is comprehensive yet simply prepared is critical for it to be understood and acted upon. This workshop will help you to gather the information, assess the data, and present your suggestions for training or non-training solutions.

### Learning Objectives

- Understand the value of creating a training needs analysis
- Apply the ICE method to assess the situation and build your training needs analysis
- Create a simple yet thorough training needs analysis for your organization or client

### Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: A Closer Look at the Training Needs Analysis
  - Defining Training Needs Analysis
  - Developing the Business Case
  - The Purpose of the Training Needs Analysis
  - When is Training Not Appropriate?
  - Three Steps
  - Summary
3. Session Three: Collecting Data
  - Step One: Identify the Future State
  - Recording the Data
  - The First Step
  - Case Studies
  - Defining the Future State
  - Step Two: Identify the Current State
  - Gathering Data
  - Step Three: Measure the Gap
  - Step Four: Create an Action Plan
  - Step Five: Implement and Follow Up
  - Making Connections
  - Case Study
  - Pre-Assignment Review
4. Session Four: Diving Deeper Into the Data
  - Setting the Stage
  - Data Collection Design
  - Gathering Information
  - Training Needs Analysis Questions
  - Designing Valid Questions
  - Adding Value to the Process
  - The McKinsey 7-S Model
  - About the Elements
  - How to Use the Framework
  - SWOT Analysis
  - Sample SWOT
  - The Five Whys Technique
5. Session Five: Creating the Report
  - Making Connections
  - Creating the Report
6. Session Six: Taking Action
  - Making Connections
  - Gap Analysis Template
  - McKinsey 7-S Model
  - SWOT Analysis
  - Designing Evaluations
  - Evaluation Levels
7. Personal Action Plan
8. Course Summary
9. Recommended Reading List
10. Post-Course Assessment

## Developing a Training Program

### *Course Overview*

Training is an essential element of development in any organization. In order for training to be valuable, the person who designs and plans it must have an excellent understanding of what the training objectives are. It is also important for the trainer to know the strategic objectives of the company, available resources, elements of the plan that can enhance the experience, and any potential barriers. With this information, the trainer can present a much stronger program that is tailored specifically to the participants' needs. This two-day workshop is designed for a trainer who wants to develop programs that are meaningful, practical, and will benefit both trainees and their organization.

### *Learning Objectives*

- Describe the essential elements of a training program
- Apply different methodologies to program design
- Demonstrate skills in preparation, research, and delivery of strong content
- Explain an instructional model
- Create a training program proposal

### *Course Outline*

- |                                      |   |
|--------------------------------------|---|
| 1. Session One: Course Overview      | Building the Training Needs Analysis        |
| Course Overview                      |   |
| Learning Objectives                  |   |
| Pre-Assignment                       |   |
| Pre-Course Assessment                |   |
| 2. Session Two: Program Design       | 6. Session Six: The Program's Basic Outline |
| Training Program Considerations      | Learning Objectives                         |
| When is Training Necessary?          | Objectives Exercise                         |
| Alternatives to Training             | 7. Session Seven: Evaluation Strategies     |
| Essential Elements                   | Methods of Evaluation                       |
| 3. Session Three: The Training Model | Evaluations Exercise                        |
| Foundations                          | Evaluating the Evaluation                   |
| Building An Engaging Program         | 8. Session Eight: Defining Your Approach    |
| Instructional Design Model           | Methodology                                 |
| 4. Session Four: Understanding Adult | Key Methodologies                           |
| Learning                             | Tips For Results                            |
| Underpinnings of Adult Education     | Approaches to Learning                      |
| Andragogy Applied to the Classroom   | Making Connections                          |
| 5. Session Five: Identifying Needs   | 9. Session Nine: Developing Content         |
| The Ice Method                       | Content Considerations                      |
|                                      | Supporting Materials                        |
|                                      | 10. Session Ten: Pre-Assignment Purpose     |
|                                      | Pre-Assignment Review                       |

11. Session Eleven: Choosing Openings and Energizers  
The Value of Games  
Tips For Success
12. Session Twelve: Training Tools  
Personality and Leadership Testing
13. Session Thirteen: Testing the Program  
Why Test?
14. Session Fourteen: Creating Proposals  
Organizing The Proposal

- Training Program Proposal  
Communicating Training
15. Session Fifteen: Building Rapport  
Questions And Answers
16. Session Sixteen: Pulling It All Together  
Call to Action
17. Personal Action Plan
18. Course Summary
19. Recommended Reading List
20. Post-Course Assessment

## Developing an eLearning Course

### *Course Overview*

If you look at any successful organization, training is a core part of their culture. With the increased use of eLearning, trainers need to design and create meaningful, practical, eLearning that will benefit both trainees and the organizations they work for.

### *Learning Objectives*

- Outline the common elements of three common instructional design models (ADDIE, Backward Design and Merrill's Principles of Instructional Design).
- Summarize the common elements of eLearning development.
- Create organizational improvement goals, including ways to accomplish the improvement.
- Propose types of training to address, based on signs that may suggest a need for training.
- Recognize action verbs that belong to each of the domains in Bloom's Taxonomy.
- Recognize commonly used verbs that are not measurable.
- Write measurable learning objectives for each domain of Bloom's Taxonomy for the Digital Age.
- Determine assessment types for each subdomain of Bloom's Taxonomy for the Digital Age.
- Create a rubric for an eLearning assignment.
- List various activities that could be used to support Universal Design for Learning.
- List various activities and attitudes that could be used to support LGBTQ2+ learners.
- Summarize in plain language the essential message of Accessibility Standards.
- Recap the four levels of eLearning.
- Map how each eLearning level corresponds to Bloom's Taxonomy.
- Suggest media standards for personal eLearning development.
- Talk about ways to address the basic tenets of teaching adults.
- Establish great activities that can be used in eLearning.
- Create a storyboard for production of eLearning.
- Make recommendations on choosing an eLearning authoring tool and learning management system (LMS), based on an organization's specific requirements.
- Evaluate using each level of Kirkpatrick's Levels of Evaluation.
- Determine return on expectation for impact evaluation.

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Instructional Design Models
  - Instructional Design Models
  - ADDIE
  - Backward Design
  - Merrill's Framework Incorporates Five Principles of Learning:
    - Instructional Design Model
    - Elements of an eLearning Development Process
3. Session Three: Analysis Phase - Needs Assessment
  - Business Goals
  - Needs Assessment
  - ICE
  - Isolating
  - Consulting
  - Evaluating
  - Training Needs Activity
  - Summary
4. Session Four: Design Phase - Learning Objectives
  - Writing Learning Objectives
  - Bloom's Taxonomy in the Digital Age
  - Bloom Verbs
  - Measurable Objectives
  - Anatomy of a Learning Objective
  - Writing Learning Objectives
5. Session Five: Design Phase - Assessment
  - Assessment
  - Convergent and Divergent Cognition
  - Domain and Subdomains Assessment
  - Examples
  - Developing Assessments for eLearning
  - Types of eLearning Assessments
  - Rubrics
  - Example Rubrics
6. Session Six: Design Phase - Reducing Barriers
  - Creating Rubrics
  - Universal Design
  - Activities for Universal Design Learning
  - UDL and LGBTQ2+
  - Activities for Universal Design Learning
7. Session Seven: Design Phase - Accessibility
  - Accessibility
  - Web Content Accessibility Guidelines (WCAG) Checklist
  - Applications and Software
  - Functional Performance Criteria
  - Information, Documentation, and Support
  - Accessibility Activity
8. Session Eight: Design Phase - Design Strategy
  - Interactivity: eLearning Levels
  - What Level of eLearning Works Best?
  - Development Time
  - User Interface
  - Design Options
  - Deciding Media Standards
9. Session Nine: Development Phase - Learning Experiences and Instruction
  - Teaching Adults
  - Ways of Teaching Children vs Adults
  - Best Practices of Adult Educational Methodologies
  - Tenets of Adult Education
  - Andragogy and UDL Applied to eLearning
  - Creating an Outline, Gathering Content and Developing a Storyboard
  - Gathering Content and Developing Activities
  - Developing Activities
  - Creating a Storyboard
  - Production
  - Prototype



- |  |   |
|--|---|
| 10. Session Ten: Development Phase -<br>eLearning Tools<br>Selecting eLearning Authoring tools<br>Selecting a Learning Management System     | Transfer of Learning Evaluation<br>Level Four: Impact Evaluation<br>Sample Impact Evaluation for Participants<br>Return on Expectations |
| 11. Session Eleven: Evaluation<br>Kirkpatrick's Levels of Evaluation<br>Level Two: Knowledge Evaluation<br>Level Three: Transfer of Learning | 12. Personal Action Plan<br>13. Course Summary<br>14. Recommended Reading List<br>15. Post-Course Assessment                            |

## Developing Your Executive Presence

### Course Overview

Some people immediately command attention and respect when they walk into a room. Do you have that kind of presence? If not, is it something that you would like to develop? This course will help you do just that by building your credibility, improving your personal appearance, honing your networking skills, and enhancing your ability to communicate effectively. You will also receive an introduction to core leadership skills.

### Learning Objectives

- Identify the elements of a strong executive presence
- Build trust and credibility with others
- Communicate effectively using verbal and non-verbal techniques
- Create a strong, positive first impression and maintain that impression as you build a relationship with others
- Develop key leadership skills, including techniques for coaching, motivating, and delivering feedback

### Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                | Open Questions                                 |
| Learning Objectives                          | Closed Questions                               |
| Pre-Assignment                               | Making Connections                             |
| Pre-Course Assessment                        | Probing Techniques                             |
| 2. Session 2: Managing Your First Impression | Managing Your Body Language                    |
| Being Confident                              | Making Connections                             |
| Dressing for Success                         | 4. Session 4: Speaking with Impact             |
| Seven Factors for Success                    | What's Your Sound?                             |
| Making Connections                           | Things to Consider                             |
| The Professional Handshake                   | Redesigning Yourself for Strength              |
| Five Factors                                 | Five Points for Any Presentation               |
| Tips for Success                             | Making Connections                             |
| Remembering Names                            | 5. Session 5: Maintaining Your Impression      |
| Building Trust and Credibility               | A Word About Business Etiquette                |
| 3. Session 3: Interpersonal Communication    | Making Connections                             |
| Skills                                       | Networking Tips and Tricks                     |
| Making Connections                           | 6. Session 6: Three Leadership Skills to Start |
| Active Listening Skills                      | Mastering Right Now                            |
| Responding to Feelings                       | Delivering Effective Feedback                  |
| Reading Cues                                 | The Goal of Effective Feedback                 |
| Demonstration Cues                           | The Characteristics of Effective Feedback      |
| Tips for Becoming a Better Listener          | Motivational Techniques                        |
| Asking Open and Closed Questions             | What Do You Think?                             |

- Coaching Others to Success
- The Coaching Formula
- The Three Factors
- 7. Session 7: Pre-Assignment Review
  - Skill Area One
  - Skill Area Two
  - Skill Area Three
  - Skill Area Four
- Skill Area Five
- 8. Session 8: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 9. Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment

## Digital Citizenship: Conducting Yourself in a Digital World

### Course Overview

This course is important because online interactions and transactions are replacing real world ones. Regrettably, digital use can become misuse and abuse, often without the responsible person realizing it. Citizens of the digital world must learn and accept their responsibilities to themselves and to others.

### Learning Objectives

- Define what being a good digital citizen means
- Describe the nine elements of digital citizenship
- Understand how to conduct yourself in the digital world

### Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                        | Digital Literacy                                |
| Learning Objectives                                  | Digital Communication                           |
| Pre-Assignment                                       | Two Sides of the Same Coin                      |
| Pre-Course Assessment                                | Digital Commerce                                |
| 2. Session 2: Citizenship                            | Features of a Secure Website                    |
| Description of Citizenship                           | 6. Session 6: Protect Yourself / Protect Others |
| 21st Century Digital Compass                         | Rights and Responsibilities                     |
| Scenarios 1 - 3                                      | Safety and Security                             |
| Scenarios 4 - 6                                      | Health and Welfare                              |
| Scenarios 7 - 10                                     | Smartphone Addiction                            |
| 3. Session 3: Digital Citizenship                    | 7. Session 7: How To Be a Good Digital Citizen  |
| Digital Citizenship                                  | 8. A Personal Action Plan                       |
| 4. Session 4: Respect Yourself / Respect Others      | Starting Point                                  |
| Digital Etiquette                                    | Where I Want to Go                              |
| Examples of Good and Bad Etiquette                   | How I Will Get There                            |
| Digital Access                                       | 9. Course Summary                               |
| Digital Law  | 10. Recommended Reading List                    |
| 5. Session 5: Educate Yourself / Connect with Others | 11. Post-Course Assessment                      |

# Digital Transformation

## Course Overview

Digital transformation looks different for every business, but at its core, it means altering how a company operates with the addition of technology and with the goal of improving customer experience and the workplace. This one-day course will teach you about digital transformation, and what companies in different industries are doing, as well as best practices so you can do it yourself.

## Learning Objectives

- Define digital transformation
- Understand why it matters
- Pinpoint which businesses are succeeding and how they are doing it
- Get started on your own company's digital strategy

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview  | Case Study 3: The Washington Post            |
| Learning Objectives  | Case Study 4: Air New Zealand                |
| Pre-Assignment   | Case Study 5: Town of Cary, North Carolina   |
| Pre-Course Assessment  | 5. Session Five: Awareness Is The First Step |
| 2. Session Two: Digital Transformation – What Is It? Why Does It Matter? | Use Technology to Build on Success           |
| Defining Digital Transformation  | 6. Session Six: Let's Do This                |
| Why?   | Things to Keep in Mind                       |
| 3. Session Three: Where Do We Start?                                     | 7. Session Seven: Make A Plan                |
| Start Thinking About Changes   | Digital Transformation Plan                  |
| Questions to Ask   | 8. Personal Action Plan                      |
| Customer Interaction   | Starting Point                               |
| 4. Session Four: Who Is Doing It Well?                                   | Where I Want to Go                           |
| Mistakes That Can be Made  | How I Will Get There                         |
| Case Study Review  | 9. Course Summary                            |
| Case Study 1: Netflix  | 10. Recommended Reading List                 |
| Case Study 2: Domino's   | 11. Post-Course Assessment                   |

## Digital Transformation: Communication and Sales Channels

### Course Overview

Communication is an essential component of success for any business. Finding the best way to create meaningful connections with customers is paramount. In order to engage the consumer, companies need to understand them.

In this course, we focus on the customer and their journey as well as how to ensure an organization's digital transformation creates value for them.

### Learning Objectives

- Understand the ways technology is impacting how businesses communicate with their audiences.
- Map out the customer journey and identify the touchpoints influenced by technology.
- Understand the growing role of social media, influencer, and content marketing and their impacts on brand promotion.
- Analyze how businesses utilize customer data for targeting and personalization.
- Assess the role of technology in integrating various channels to offer a consistent brand experience.

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview             | 6. Session Six: Digital Marketing Overview |
| Learning Objectives                         | Defining Digital Marketing                 |
| Pre-Assignment                              | Where to Start                             |
| Pre-Course Assessment                       | Measuring Outcomes                         |
| 2. Session Two: Communicating with Business | 7. Social Media and Influencer Marketing   |
| Audiences                                   | Staying on Top of Social Media Trends      |
| The Business Audience                       | Managing Online Reputation and Customer    |
| Reaching Audiences Through Technology       | Feedback                                   |
| 3. Session Three: Customer Communication    | The Power of Influencers                   |
| and Connection                              | Content Marketing                          |
| Sticking With What Works                    | 8. Session Eight: Digital Sales            |
| 4. Session Four: Customer Experience        | Transitioning to Digital Sales             |
| Defining Customer Experience                | The Role of the Salesperson                |
| Transforming the Digital Customer           | Choosing to Adapt                          |
| Experience                                  | 9. Session Nine: Overcoming Customer       |
| The Digital Customer Value Proposition      | Challenges                                 |
| 5. Session Five: Customer Journey Mapping   | Challenges to Consider                     |
| Understanding the Customer Journey in       | 10. Personal Action Plan                   |
| the Digital Age                             | 11. Course Summary                         |
| Building the Customer Journey               | 12. Post-Course Assessment                 |

## Digital Transformation: Data and Analytics

### Course Overview

This course will look at ways businesses can benefit from data and analytics and use them to drive decision-making as organizations embrace digital transformation. It will also discuss how to ethically collect data, and the obligation to protect data.

### Learning Objectives

- Define the importance of data for their organization
- Appreciate the ethics of data collection
- Define data analytics and describe how this can help small- and medium-sized businesses
- Discuss how data is being used to build generative AI
- Understand the steps to shape data-driven cultures
- Grasp the importance of data protection and privacy

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | Common Mistakes                                 |
| Learning Objectives                          | 8. Session Eight: Data Privacy and Security     |
| Pre-Assignment                               | Understanding Data Privacy                      |
| Pre-Course Assessment                        | Data Security Threats                           |
| 2. Session Two: Introduction to Data and its | Case Study: ACMETech's Data Security            |
| Significance                                 | Nightmare                                       |
| Understanding and Analyzing Data             | 9. Session Nine: Data Protection                |
| Becoming Data-Driven                         | Data Protection Strategies                      |
| Case Study                                   | Establishing Data Privacy Policies              |
| 3. Session Three: Data Collection            | 10. Session Ten: Building a Data-Driven Culture |
| Collection Methods and Challenges            | From Data Disconnect to Data First              |
| Types of Data                                | Pre-Assignment Review                           |
| 4. Session Four: Data Ethics and Storage     | Comparative Case Study                          |
| Defining Customer Experience                 | The Right Skills                                |
| Ethical Data Practices                       | 11. Personal Action Plan                        |
| 5. Session Five: Data Analytics for Business | 12. Course Summary                              |
| Types and Techniques                         | 13. Post-Course Assessment                      |
| Data Analytics Value                         |   |
| 6. Session Six: The Introduction of AI       |   |
| The Power of Data: Fueling a New Wave of     |   |
| AI   |   |
| Navigating the Future of Gen AI in Business  |   |
| 7. Session Seven: Visualizing Data           |   |
| The Power of Simplicity                      |   |
| Choosing the Right Method                    |   |

## Digital Transformation: Organization and People

### Course Overview

This course looks at how organizational readiness, leadership competencies, and the impact of culture contribute to the implementation of a successful digital transformation initiative.

### Learning Objectives

- Define what an organizational readiness assessment is, and why it is helpful.
- Consider what roles digital culture and leadership play when it comes to managing change in the workplace.
- Understand the importance of digital reskilling in the workplace.
- Understand the Agile methodology and how its principles can apply to organizational culture.

### Course Outline

1. Session One: Course Overview
    - Learning Objectives
    - Pre-Assignment
    - Pre-Course Assessment
  2. Session Two: Organizational Readiness for Digital Transformation
    - Assessing Readiness for Change
    - Challenges to Organizational Readiness
    - Probing Organizational Dynamics
  3. Session Three: Employee Engagement and Preparedness
    - Questions for Employees to Ask
    - Employee Readiness for Change
  4. Session Four: Leading a Digital Transformation
    - Embracing Digital Mastery
    - Digital Culture and the Role of Leadership
    - Case Study: Leadership
  5. Session Five: Collaboration
    - The Role and Impact of Collaboration
  6. Session Six: Digital Skills and Reskilling
    - Employee Capabilities and Training
    - Strategies for Talent Management
  7. Effective Communication and Measuring Progress
    - Communicating Progress
    - Measuring and Reporting Progress
    - Case Study: Communication Hurdles
  8. Session Eight: Culture Change
    - Agile Culture vs. Traditional
    - Case Study: Thompson's Boutique Retailers
  9. Session Nine: Implementing a Digital Initiative in an Agile Culture
    - Step by Step
    - Pre-Mortem
  10. Personal Action Plan
  11. Course Summary
- Post-Course Assessment



## Digital Transformation: Overview

### Course Overview

This course defines digital transformation and articulates the impacts it can have on a business. It details the factors to consider when an organization is implementing their own digital transformation strategy.

### Learning Objectives

- Define digital transformation and understand the impacts it can have on an organization.
- List reasons a business may have for embarking on a digital transformation and goals it could help them achieve while considering the relevance for your organization.
- Understand what a digital readiness assessment is and how to conduct one.
- Grasp the basics of a customer journey map and how it relates to digital transformation.
- Understand what mistakes to avoid during a digital transformation and list the key factors for success.
- Make connections between business and digital strategies.
- Understand how to build a digital transformation strategy.

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | Designing the Journey                         |
| Learning Objectives                          | Customer Interaction                          |
| Pre-Assignment                               | Mistakes That Can be Made                     |
| Pre-Course Assessment                        | Five Key Factors?                             |
| 2. Session Two: Digital Transformation       | 6. Session Five: Digital Strategy Development |
| Defined                                      | Business Strategy and the Role of Digital     |
| Definition                                   | Transformation                                |
| Understanding Digital Transformation and     | Considerations                                |
| its Value for Businesses                     | Case Study: Air New Zealand                   |
| Digital Transformation and Business          | 7. Session Six: Digital Transformation Steps  |
| Objectives                                   | Key Steps                                     |
| 3. Session Three: Why Digital                | Building a Business Case for Digital          |
| Transformation?                              | Transformation                                |
| Why Digital Transformation?                  | Summary of Intentions                         |
| The Price of Failing to Adapt                | 8. Personal Action Plan                       |
| 4. Session Four, Part One: Assessing Digital | 9. Course Summary                             |
| Readiness                                    | 10. Post-Course Assessment                    |
| Navigating the Crucial Factors               |   |
| Questions to Ask                             |   |
| 5. Session Four, Part Two: Assessing Digital |   |
| Readiness                                    |   |

## Digital Transformation: Processes

### Course Overview

This course will examine business processes and how organizations are improving them through technology. It will explore the benefits of mapping them out and will look at why automating steps of a process could be helpful. The basic ideas of change management, Lean, and DevOps will also be explored, including how they relate to digital transformation.

### Learning Objectives

- Understand business processes, the purpose of mapping them, and how to do it.
- Identify what aspects of processes can be improved through the addition of technology.
- Understand the steps to take for automating parts of a process.
- Grasp the basic principles of Lean and DevOps, including how they relate to business process transformation.
- Appreciate the importance of customer and employee centricity in the redesign of business processes.

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview  | Understanding Lean   |
| Learning Objectives  | Eliminating Waste  |
| Pre-Assignment   | Case Study: Improving patient Flow in a Healthy Care Clinic  |
| Pre-Course Assessment  |  |
| 2. Session Two: Understanding Business Processes in the Digital Age                | 7. Session Seven: DevOps and Business Process Transformation |
| Introduction to Business Processes   | Understanding DevOps   |
| What is Process Mapping?   | Eliminating Waste  |
| 3. Session Three: Process Optimization   | Case Study: Improving Patient Flow in a Healthcare Clinic    |
| Identifying Areas for Improvements   | 8. Session Eight: Customer and Employee Centricity           |
| Steps to Take  | What it Means to be Customer and Employee Centric            |
| 4. Session Four: Process Automation  | The Importance of Customer and Employee Experiences          |
| Understanding the Automation of Business Processes                                 | Steps to Take  |
| Introducing Automation to Business Processes                                       | 9. Session Nine: Case Study                                  |
| Implementing a Workflow Engine   | Digital Dilemmas at Dine Divine                              |
| 5. Session Five: Change Management   | The Customer Perspective                                     |
| Principles of Change Management Applied to Business Process Digital Transformation | 10. Personal Action Plan                                     |
| 6. Session Six: Applying Lean Methodology to Digital Transformation                | 11. Course Summary   |

## 12. Post-Course Assessment

## Digital Transformation: Strategy

### Course Overview

This course will look at how to integrate overall business strategy and digital transformation plans to ensure the best outcomes. Participants will learn how to assess the current state of the business, how to set compelling and practical goals, and the importance of making informed decisions.

### Learning Objectives

- Describe the role of leaders in setting the agenda for a digital transformation that fits the organization.
- Develop a clear and concise strategy for digital transformation.
- Define SMART goals and Objectives and Key Results, and how they relate to businesses developing a strategy for digital transformation.
- Explain how data can be leveraged for businesses when making major decisions.

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                                  | The Value of Data                           |
| Learning Objectives  | The Right Data                              |
| Pre-Assignment   | Making Data Accessible to All               |
| Pre-Course Assessment  | 7. Session Seven: Customer-Centric Approach |
| 2. Session Two: Understanding Strategy and the Digital Landscape | How Will This Benefit the Customer?         |
| Why Strategy Matters   | Case Study                                  |
| Digital Landscape Overview                                       | 8. Session Eight: Implementation            |
| 3. Session Three: Assessing the Current State                    | Plan to Action                              |
| Asking the Right Questions                                       | 9. Personal Action Plan                     |
| Understanding Swot   | 10. Course Summary                          |
| Swot's Relevance   | 11. Post-Course Assessment                  |
| 4. Session Four: Setting Goals and Measuring Progress            |   |
| Setting S.M.A.R.T. Digital Objectives                            |   |
| Defining Objectives and Key Results (OKRs)                       |   |
| 5. Session Five: Aligning Business Strategy and Digital Plans    |   |
| Understanding and Communicating Strategy                         |   |
| Overcoming the Barriers  |   |
| Case Study: Stellar Footwear's Digital Strides                   |   |
| 6. Session Six: Data-Driven Decision Making                      |   |

# Digital Transformation: Technology and Digital Skills

## Course Overview

This course will introduce businesses and individuals to the concept of digital literacy, explore emerging tech trends, and underline the value of fostering a digital mindset and culture of continuous learning. By the end of this course, participants will be primed to assess their organization's digital capabilities and determine which technologies would be a good fit.

## Learning Objectives

- Define digital literacy and articulate why it matters.
- Assess your organization's current digital capabilities and know how to determine whether a particular technology aligns with business needs.
- Recognize the importance of a digital mindset and a culture of continuous learning in an organization undergoing digital transformation.
- Understand the transformative potential of technology, such as AI, automation, e-commerce, and data analytics tools, and how they can impact businesses.
- Appreciate the significance of cybersecurity protocols and know where to start to build a plan of action for protecting business data and systems.
- Discuss the impacts the pandemic had on consumers and technology.

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview            | Remote Work                                |
| Learning Objectives                        | 5. Session Five: Assessment and Growth     |
| Pre-Assignment                             | Considerations                             |
| Pre-Course Assessment                      | Assessment Tool: Four-Box Matrix           |
| 2. Session Two: Digital Literacy Defined   | Four-Box Matrix Activity                   |
| The Importance of Keeping Pace with        | Digital Mindset                            |
| Technology                                 | Digital Mindset Activity                   |
| What is Digital Literacy?                  | 6. Session Six: Change Management          |
| Digital Literacy in Action                 | Encouraging the Digital Change             |
| 3. Session Three: Digital Literacy for     | Continuous Learning                        |
| Businesses                                 | Improving Digital Skills                   |
| Digital Understanding for Small- to        | Pre-Assignment Reflection                  |
| Medium-Sized Businesses                    | 7. Session Seven: Introduction to Data     |
| Assessing Digital Literacy                 | Analytics                                  |
| 4. Session Four: Technology Redefining the | The Power of Data                          |
| Business Landscape                         | Case Study: Brewing Success with Data      |
| Trends Reshaping Business Dynamics         | Analytics                                  |
| Artificial Intelligence                    | 8. Session Eight: Navigating Cybersecurity |
| Case Study: H&M                            | What is Cybersecurity?                     |
| Automation                                 | Small Business, Bigger Hurdles             |

How to Protect the Business

How Safe Are You Online?

9. Session Nine: E-Commerce

Pandemic Impacts on Consumer Buying

10. Personal Action Plan

11. Course Summary

12. Post-Course Assessment

# Disability Awareness: Working with People with Disabilities

## Course Overview

This course aims to raise awareness about hiring people with disabilities in order to create a more inclusive work environment while leveraging the skills and knowledge that people with disabilities possess.

## Learning Objectives

- Prepare to welcome people with disabilities into your workplace
- Interact with people with disabilities
- Identify and overcome barriers in the workplace
- Use respectful, appropriate, acceptable language in any circumstance
- Understand what your company can do during hiring and interviewing
- Understand what job accommodation is and how it applies in your workplace

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview            | Introduction to Physical Accessibility       |
| Learning Objectives                        | How to Remove Barriers                       |
| Pre-Assignment                             | Case Studies                                 |
| Pre-Course Assessment                      | 7. Session Seven: The Cornerstones of        |
| 2. Session Two: Defining Terms             | Diversity                                    |
| What are Disabilities?                     | About the Cornerstones                       |
| About Stereotypes                          | Knowledge                                    |
| Some Common Phrases and the                | Understanding                                |
| Stereotypes Behind Them                    | Acceptance                                   |
| Making Connections                         | Behavior                                     |
| 3. Session Three: Misconceptions and       | 8. Session Eight: Pre-Assignment Review      |
| Realities                                  | Pre-Assignment Review                        |
| Misconceptions and Realities               | 9. Session Nine: Encouraging Diversity by    |
| 4. Session Four: A Business Case           | Hiring                                       |
| Getting Into It                            | What Can We Ask?                             |
| Case Study                                 | What Can the Candidate Expect?               |
| Summary                                    | What Do You Do?                              |
| 5. Session Five: Dissecting Labels         | Do You Wait to Disclose?                     |
| Giving Your Words Some Thought             | 10. Session Ten: Appropriate Behavior        |
| Ground Rules                               | The Four Steps of the STOP Technique         |
| Being Practical                            | Tips for Using STOP                          |
| Mingle with Me                             | Making Connections                           |
| Using Sensitive Language                   | 11. Session Eleven: Communication Essentials |
| 6. Session Six: Barriers and Accessibility | for Disability Awareness                     |
| Barriers                                   | Ground Rules to Get Started                  |
| Common Barriers                            | Respecting Confidentiality                   |

- Sample Consent Form
- Asking the Right Questions
- Sample Work Plan Information Request
- Sending the Right Message
- 12. Session Twelve: Communication Styles
  - Understanding Dichotomies
  - Making Connections
  - Advantages and Disadvantages
  - Dichotomies in Action
- 13. Session Thirteen: Critical Conversations
  - Introductory Elements
  - Getting the Conversation Started
  - A Basic Script
  - A Script for Mental Health Issues
  - A Script for Physical Disability Issues
  - Introduction
  - Treatment Questions
- Functional Abilities
- Education/Employment History
- Conclusion
- 14. Session Fourteen: Accommodation and Adaptation
  - How Far Do You Go In Accommodation?
  - Knowing What is Required
  - Value of Job Shadows
- 15. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 16. Course Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment



## Diversity, Equity, and Inclusion

### Course Overview

The purpose of this course is to raise the participant's awareness about diversity, equity and inclusion. These terms are often used interchangeably but they are separate concepts and principles. Diversity, equity and inclusion recognize that there are differences and that everyone is unique. This leads to creativity, innovation and increased productivity in the workplace. Diverse, equitable and inclusive workplaces give people the opportunity to bring their authentic selves and feel a sense of belonging.

### Learning Objectives

- Understand the importance of diversity, equity, and inclusion for workspaces
- Be able to describe and analyze key issues of diversity, equity, and inclusion in one's work environments and community
- Grasp the power of diversity as a tool for creativity, and productive collaboration in the workspace
- Have the opportunity to share elements of one's culture with others
- Learn that norms and practices one thinks are universal may be culturally dependent

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                  | Who Is in the Workforce?                       |
| Learning Objectives                              | Generation Z                                   |
| Pre-Assignment                                   | Debrief  |
| Pre-Course Assessment                            | 6. Session Six: Privilege Walk                 |
| 2. Session Two: Diversity, Equity, and Inclusion | Privilege                                      |
| Barriers to Diversity, Equity, and Inclusion     | Taking the Privilege Walk                      |
| Defining the Terms                               | Privilege Walk Statements                      |
| Diversity and Inclusion                          | 7. Session Seven: Neurodiversity in the        |
| Diverse Workspaces                               | Workplace                                      |
| 3. Session Three: Inequities in Your Community   | Neurodiversity                                 |
| Equality vs. Equity                              | Inclusive Workspace                            |
| Using the Equity Lens                            | Debrief  |
| Debrief  | 8. Session Eight: Strategies for the Workplace |
| 4. Session Four: The Look                        | Workplace Strategies                           |
| Video: The Look                                  | Best Practices                                 |
| Examining Prejudgment and Stereotyping           | Brainstorm                                     |
| Stereotypes                                      | Five Statements                                |
| Prejudice  | 9. Personal Action Plan                        |
| Discrimination                                   | 10. Course Summary                             |
| Bias   | 11. Recommended Reading List                   |
| 5. Session Five: Diversity Profile               | 12. Post-Course Assessment                     |
| Pre-Assignment Review: Who Are We?               |  |

# Dynamite Sales Presentations

## Course Overview

A great sales presentation does not demand that you have all the bells and whistles to impress the client with your technical skills. Rather, try impressing your clients with your knowledge of the products and services you sell and your understanding of their problems and the solutions they need. This course will show you how to create a winning proposal and how to turn it into a dynamite sales presentation.

## Learning Objectives

- Identify the key elements of a quality proposal
- Perfect your first impression, including your dress and your handshake
- Feel more comfortable and professional in face-to-face presentations
- Write a winning proposal
- Feel more comfortable and professional in face-to-face presentations

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Getting Down to Business
  - Types of Writing
  - Business Writing Basics
  - Business Writing Basics: Proposals vs. Tenders
  - About Proposals
  - Introduction
  - Background
  - Proposal
  - Staffing/Resources
  - Budget
  - Authorization
  - Formal Proposals
  - Proposals... in Your Own Words
3. Session 3: Writing Your Proposal
  - Clarify Your Objectives
  - Analyze Your Audience
  - Evaluate Reader's Knowledge
  - Where Do I Start?
  - Building My Case
  - Drafting a Proposal: Keep it Consistent
4. Session 4: Getting Thoughts on Paper
  - Obtaining Testimonials
  - Terminology
  - Planning Your Proposal: Getting Started
  - Putting Your Thoughts in Order
  - Proposal Type
  - Mapping the Information
  - Strategies
  - Sample Outline
  - When to Polish
  - Word Selection
  - Layout
  - Graphics
  - Introduction and Background
  - Body of the Proposal
  - Resources, Budget and Authorization
5. Session 5: Basic Proposal Formats
  - Choosing a Format
  - The Benefits of a Good Format
  - The Basic Formats
  - Choosing an Approach
  - Comparing the Approaches
  - Example of a Direct Approach Proposal
  - Direct to Indirect

6. Session 6: Expert Editing Tips
  - Editing Tips
  - The Fog Index
  - Fog Index Example
  - Practice Piece
7. Session 7: The Handshake
  - Cultivating a Professional Handshake
  - Tips for Success
  - Evaluating Handshakes
8. Session 8: Getting Ready for Your Presentation
  - Preparation Tips
  - Presenting to Others
  - Presentation Techniques
  - Persuasive Language
  - Selling to Experts? Watch Out!
9. Session 9: Elements of a Successful Presentation
  - Your Body Language
  - Your Equipment
  - Make an Impact
  - Other Visual Aids
  - Your Message
  - Your Effect on the Environment
- Your Initial Impression
  - The Rule of Twelve
  - Do You Look Approachable?
  - Positives and Negatives of Body Language
  - Positives and Negatives Example
  - Responses
  - Sending a Positive Message
10. Session 10: Dressing Appropriately
  - Impressions Count!
  - Workplace Clothing
  - Sales Presentation Clothing
  - Dressing to Impress
  - Managing Scent
  - Creating a Professional Package
11. Session 11: Presentations
  - Presentation Preparation
  - Evaluating Your Presentation
12. Session 12: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
13. Summary
14. Post-Course Assessment

# E-Commerce Management

## Course Overview

As the global Internet population continues to grow, electronic commerce is growing as well. By the end of 2015, e-commerce is expected to generate over \$400 billion annually. This huge market encompasses traditional e-commerce, as well as m-commerce (which is growing faster than any other sector) and location-based e-commerce.

This course will teach entrepreneurs how to develop, market, and manage an e-commerce business, giving them a crucial advantage in today's competitive market.

## Learning Objectives

- Describe what the terms e-commerce and m-commerce mean
- Develop an e-commerce business plan
- Evaluate e-commerce software options
- Build an online store with product pages, supporting features, a shopping cart, and an effective checkout process
- Test, launch, and update your e-commerce site
- Design engaging, responsive web content
- Understand e-commerce payment options and choose appropriate options for your site
- Use appropriate tools to track key e-commerce metrics
- Identify and optimize supporting e-commerce activities, such as customer service, sales, and inventory management
- Create a marketing plan with all the essential elements
- Market your online store using social media and other appropriate channels
- Use discounts and promotions to market your e-commerce business
- Understand what security and privacy issues face e-commerce businesses and handle customers' information accordingly
- Protect your intellectual property
- Identify the rules and regulations that will govern your e-commerce businesses

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview            | The Six Models                           |
| Learning Objectives                      | The Language of E-Commerce               |
| Pre-Assignment                           | 3. Session 3: E-Commerce Building Blocks |
| Worksheet                                | What's Your Goal?                        |
| Pre-Course Assessment                    | The E-Commerce Business Plan             |
| 2. Session 2: Getting to Know E-Commerce | Company Description                      |
| What is E-Commerce?                      | Revenue Model                            |
| A Brief History                          | Products and Services                    |
| Why Do Customers Buy Online?             | Competitive Analysis                     |

- Organizational Strategy
- Marketing Strategy
- Making Connections
- 4. Session 4: Software Options and Solutions
  - Looking at the Options
  - Options for Your Business
  - Test Driving
- 5. Session 5: Building Your Online Store
  - Your Internet Address
  - Overall Site Organization
  - Top-Level Page
  - Call To Action
  - Navigating Through Your Site
  - Search Box
  - Menus and Categories
  - Building Effective Product Pages
  - Sample Pages
  - Shopping Cart Features
  - The Checkout Process
  - Optimizing Your Checkout Process
  - Order Confirmation Page
  - Additional Site Elements
  - Contact Page
  - Frequently Asked Questions
  - Testimonials
  - Privacy and Information Gathering Policies
  - Shipping Options
  - Order Information
  - Member Information
  - Social Media Integration
  - Pre-Assignment Review
- 6. Session 6: The Finishing Touches
  - Testing, Launching, and Updating
  - Optimization Tools
  - Launching the Site
  - Post-Launch Testing
  - Split and Multivariate Testing
  - Making Connections
- 7. Session 7: Creating an Engaging User Experience
  - Designing Engaging Web Content
  - Design Do's and Don'ts
  - Making Connections
  - Use Dynamic Pages
  - Leverage User-Generated Content
  - Using Responsive Web Design
  - Building Relationships
  - Making Connections
- 8. Session 8: Transaction Management
  - Introduction
  - Credit and Debit Cards
  - Online Payment Systems
  - Mobile Payment Systems
  - Digital Cash
  - Cash on Delivery or Check by Mail
- 9. Session 9: M-Commerce
  - The Growth of Mobile Commerce
  - Top M-Commerce Retailers
  - Strategies for Success
  - What Does the Future Hold?
- 10. Session 10: E-Commerce Analytics
  - Key Metrics
  - Overall Site Metrics
  - Shopping Cart Metrics
  - Tracking Referrers and Keywords
  - Tools to Track Data
  - E-Commerce Management Tools
  - Customer Relationship Management Systems
  - Third Party Tools
  - A Final Note
  - Making Connections
- 11. Session 11: Supporting Your E-Commerce Business
  - Behind the Scenes Activities
- 12. Session 12: Marketing Your E-Commerce Business
  - Creating a Marketing Plan
  - Cycle Overview
  - Looking at the Steps

Essential E-Commerce Marketing Channels	Fair Use Considerations
E-Mail	Resources
Offline Media	14. Session 14: Rules and Regulations
Marketing with Social Media	Trade Rules and Regulations
Facebook	Privacy Regulations
Twitter	Global Differences
Pinterest	Case Study
Making Connections	Making Connections
Creating Promotions that Make You Money	15. Session 15: A Personal Action Plan
13. Session 13: Security and Fraud Awareness	Starting Point
Protecting Your Customers and Your	Where I Want to Go
Business	How I Will Get There
Building Trust with Customers	16. Summary
Your Responsibilities to Your Business	17. Recommended Reading List
Intellectual Property on the Internet	18. Post-Course Assessment

## Effective Planning and Scheduling

### Course Overview

As project managers and leads, we all know how difficult it can be to accurately determine the duration of a project, yet that is exactly what is expected of us on a regular basis. This course will not disclose the secret of creating an accurate schedule, because there isn't one. However, it will provide the factors and fundamental elements that you should consider and address when creating any type of schedule.

### Learning Objectives

- Define and create a Work Breakdown Structure
- Identify and understand task relationships
- Estimate task durations and determine project duration
- Construct a network diagram
- Calculate the critical path of a project
- Use the Program Evaluation and Review Technique (PERT) to create estimates
- Plan for risks
- Create a communication plan
- Effectively allocate project resources
- Update and monitor the project schedule

### Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                    | Organizational Chart                        |
| Learning Objectives                              | Work Breakdown Structure Numbering          |
| Pre-Assignment                                   | Sample Numbering                            |
| Pre-Course Assessment                            | What is a Work Breakdown Structure          |
| 2. Session 2: Projects and Schedules             | Dictionary?                                 |
| Making Connections                               | Samples                                     |
| 3. Session 3: The Work Breakdown Structure (WBS) | Work Breakdown Structure Exercise           |
| What is a Work Breakdown Structure?              | 4. Session 4: Estimating Activity Durations |
| Sample WBS                                       | Estimating Tips and Techniques              |
| The Role of a Work Breakdown Structure           | Sample Spreadsheet                          |
| Creating a Work Breakdown Structure              | Gathering Resources                         |
| Steps for Creating the Work Breakdown Structure  | Activity List                               |
| Types of Work Breakdown Structure                | Resources                                   |
| Diagrams   | Estimating Activity Durations               |
| Work Breakdown Structure Formats                 | Tips for Increasing Estimation Accuracy     |
| Indented List                                    | 5. Session 5: Camping Case Study            |
| Spreadsheet                                      | Camping Case Study                          |

6. Session 6: Identifying Task Dependencies
  - About Task Dependencies
  - Washing a Car
  - Key Questions
  - Dependency Definitions
  - Task Dependency Types
  - FS: Finish-to-Start
  - SF: Start-to-Finish
  - FF: Finish to Finish
  - Case Study: Trip to New York
7. Session 7: Aligning Resources with Activities
  - Definitions
  - Resource Breakdown Structure
  - Sample Resource Breakdown Structure
  - Creating the Resource Breakdown Structure
  - Availability and Skills
  - Resource Calendars
  - Stages of Resource Scheduling
  - Definition
  - Allocation
  - Aggregation
  - Leveling
  - Considering the Constraints
  - Resource Turnover
  - Case Study: Planning an Outdoor Concert
  - Task Two
  - Task Three
8. Session 8: Project Planning
  - Network Diagrams
  - About Activity on Node Diagrams
  - Sample Activity on Node Diagram
  - About Activity on Arrow Diagrams
  - Sample Activity on Arrow Diagram
  - Critical Path Method
  - Sample Project
  - Creating a Network Diagram
  - Starting Network Diagram
  - Perform Forward Pass through Network
  - Perform Backward Pass through Network
  - Determine Slack
  - Establish the Critical Path
  - Critical Path Exercise
  - Program Evaluation and Review Technique (PERT)
  - The PERT Formula
  - Creating Time Estimates
  - Making Connections
  - The Value of PERT
  - About Gantt Charts
  - Sample Gantt Chart
  - Gantt Chart Exercise
9. Session 9: Scheduling Software
  - Choosing the Right Tools
  - How Do You Know What Software is Best For You?
  - Open Workbench
  - Microsoft Project
10. Session 10: Uncertainty and Risk Management
  - About Risk Management
  - Sample Risk Register
  - Risk Management Planning
  - Identification of Risk
  - Quantification of Risk
  - Responding to Risk
  - Monitoring and Controlling Risk
  - Mini Case Study
  - Pre-Assignment Review
11. Session 11: Communication Strategies
  - About Communication
  - Purpose
  - Information Required
  - Frequency
  - Method
  - Tips for Successful Communication
  - Team Members
  - Project Stakeholders
  - Project Team
  - Other Special Target Groups/End Users
  - Cross-Functional Teams
  - Communication Exercise



- |   |  |
|---|--|
| 12. Session 12: Creating a Viable Schedule  | Schedule Monitoring                    |
| Creating a Schedule                         | Case Study                             |
| Common Scheduling Problems                  | Questions                              |
| 13. Session 13: Updating and Monitoring the | 14. Session 14: A Personal Action Plan |
| Schedule                                    | Starting Point                         |
| Schedule Updates                            | Where I Want to Go                     |
| Frequency of Updates                        | How I Will Get There                   |
| Receiving Updates                           | 15. Summary                            |
| Format for Updates                          | 16. Recommended Reading List           |
| Better Predicting                           | 17. Post-Course Assessment             |

# Emotional Intelligence

## Course Overview

Your EQ, your ability to connect with others and manage your own emotions and those of others, which will determine how successful you are in life. When we look at the truly extraordinary people who inspire and make a difference you will see that they do this by connecting with people at a personal and emotional level. What differentiated them was not their IQ but their EQ – their emotional intelligence. This course will help you develop your emotional intelligence.

## Learning Objectives

- Understand what emotional intelligence means
- Recognize the importance of developing emotional intelligence for personal and workplace success
- Use techniques to understand, employ and appreciate the role of emotional intelligence in the workplace
- Understand different emotions and how to manage them
- Create a personal vision statement
- Understand the difference between optimism and pessimism
- Validate emotions in others

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                            | What is Optimism?                             |
| Learning Objectives  | ABCs of Optimism                              |
| Pre-Assignment   | Pessimism vs. Optimism                        |
| Pre-Course Assessment                                      | VET Process                                   |
| 2. Session Two: Emotional Intelligence                     | Adversities                                   |
| Defined  | 6. Session Six: Validating Emotions in Others |
| Definitions and Thoughts                                   | Two Techniques                                |
| The Six Seconds Model                                      | The SOLER Technique                           |
| Making Connections   | The VALUE Technique                           |
| 3. Session Three: The Importance of EI                     | Communication Tips                            |
| The Importance of EI                                       | 7. Session Seven: Understanding Emotions      |
| Benefits of Developing Emotional Intelligence in Employees | The Seven Human Emotions                      |
| 4. Session Four: EI Blueprint                              | What Do Emotions Tell Us?                     |
| EI Blueprint   | Applying Emotional Intelligence               |
| Identify Emotions  | Positives and Negatives                       |
| Understand and Manage                                      | The Emotional Map                             |
| Use and Communicate  | Strengthening Emotional Intelligence          |
| 5. Session Five: Optimism                                  | To Develop Self-Awareness                     |

- To Develop Self-Management
- To Develop Relationship Management
- 8. Session Eight: Setting Your Personal Vision
  - Defining Your Principles
  - Creating Your Vision
  - Understanding Your Values
  - Defining Our Values
  - Identifying Our Influences
- Identifying Their Qualities
- Considering Your Strengths and Talents
- What Is Standing in Your Way?
- Think in Terms of Relationships
- What Would They Say?
- Creating Your Vision Statement
- 9. Personal Action Plan
- 10. Course Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

## Employee Accountability

### Course Overview

An article in the March 11, 2010 edition of TIME magazine purported to explain “why we have entered the post-trust era.” Indeed, we seem to be in a time where people act inappropriately and then refuse to take responsibility for their actions. Who can we blame for the world economic crisis, issues with religion, the outcomes of our governments, or the state of the environment? More to the point, why do we spend so much time and energy looking to pin the blame on someone (usually anyone but ourselves)?

With this in mind, it’s no wonder that organizations who promote accountability are more successful and more productive. In this course, you will learn about what accountability is, how to promote it in your organization, and how to become more accountable to yourself and others.

### Learning Objectives

- Understand what accountability is and what events in history have shaped our view of it
- Identify the requirements for personal and corporate accountability
- Apply the cycle of accountability and the fundamental elements required to build an accountable organization
- Describe what individuals must do to become accountable
- Build skills required for accountability, including goal setting, giving and receiving feedback, and delegation
- Pinpoint ways to build ownership in your organization
- Isolate areas for further self-improvement

### Course Outline

#### 13. Session 1: Course Overview

Learning Objectives

Pre-Assignment

Pre-Course Assessment

#### 14. Session 2: Defining Accountability

What is Accountability?

Why the Focus on Accountability?

The Results Are In

The Era of Distrust

1960's

1970's

1980's and 1990's

The First Years of 2000

#### Lessons Learned

#### 15. Session 3: Creating an Accountable Organization

The Accountability Cycle

Ways to Increase Accountability

The Building Blocks

Case Study

Questions

Accountability Starts with Me!

Assertiveness

Responsibility

A Final Note

Pre-Assignment Review

- 16. Session 4: Setting Goals and Expectations
  - Tips and Tricks
  - SPIRIT
  - Structuring Expectations
  - A Final Note
  - Making Connections
  - Top Ten Ways to Create and Share Ownership
- 17. Session 5: Doing Delegation Right
  - Understanding Delegation
  - Four Basic Steps to Delegation
  - Deciding What to Delegate
  - The Five Levels
  - Breaking Down the Model
  - Monitoring Delegation
  - How Do You Monitor?
- 18. Session 6: Offering Feedback
  - The Ingredients of Good Feedback
- In Private
  - Balanced
  - Relevant
  - Specific
  - Documented
  - Personal (In the Right Way)
  - Making Connections
- 19. Session 7: A Toolbox for Managers
  - Identifying Learning Opportunities
  - Making Connections
- 20. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 21. Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment

# Employee Dispute Resolution: Mediation through Peer Review

## Course Overview

Have you ever been in a workplace situation where a supervisor has made a decision that you didn't agree with? Did you wish that you could ask someone else what they thought of the decision; whether they would have done the same thing? The peer review process offers employees just that chance, using a formalized procedure to ask, consider, and resolve just these sorts of questions. This course will teach you everything you need to know about employee dispute resolution through mediation.

## Learning Objectives

- Describe what the peer review process is
- Apply a process for employees to file grievances and for management to respond
- Choose a facilitator and panel
- Understand what is involved in the hearing process, from preliminary meetings to the hearing, and the decision process
- Explain what responsibilities and powers a panel should have
- Apply professional questioning and probing techniques
- Understand why peer review panels fail and how to avoid those pitfalls

## Course Outline

- |                                      |                                       |
|--------------------------------------|---------------------------------------|
| 1. Session 1: Course Overview        | The Facilitator's Responsibilities    |
| Learning Objectives                  | Ensuring Fairness                     |
| Pre-Assignment                       | Choosing the Panel                    |
| Pre-Course Assessment                | Making Connections: Case Study One    |
| 2. Session 2: What is Peer Review?   | Case Study Two                        |
| Defining Peer Review                 | Case Study Three                      |
| EDR and ADR                          | Case Study Four                       |
| Objectives of Peer Review            | The Panel's Contract                  |
| Peer Review Roles                    | The Panel's Role and Responsibilities |
| When to Use Peer Review              | 5. Session 5: Asking Questions        |
| 3. Session 3: Initiating the Process | Asking Good Questions                 |
| The First Three Stages               | Open Questions vs. Closed Questions   |
| The Employee's Role                  | Closed Questions                      |
| The Grievance Form                   | Open Questions                        |
| The Manager's Role                   | Overcoming Closed Questions           |
| Obtaining Witness Statements         | Probing                               |
| Other Documents                      | Results of Probing                    |
| Making Connections                   | Probing Tools                         |
| Record of Disciplinary Action        | Pushing My Buttons                    |
| 4. Session 4: The Peer Review Panel  | Part Two                              |
| Appointing a Facilitator             |                                       |

- 6. Session 6: The Peer Review Process
  - Preparing for the Hearing
  - Group Work
  - Deciding the Question
  - Making Connections
  - The Hearing
  - Making the Decision
  - Questions to Ask
  - Voting
  - The Decision
  - About Recommendations
- 7. Session 7: Panel Walkthrough
  - Preparation
  - Role One: Aaron Mayfield
  - Role Two: Jason Smith (Supervisor)
  - Role Three: Lucinda Donalds (Witness)
  - Panel Presentation
  - Decision Time
- 8. Session 8: Why Does the Process Fail?
  - Key Factors
  - The Importance of Transparency
  - Key Skills
- 9. Session 9: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

## Employee Recognition: Appreciating Your Workforce

### Course Overview

Everyone likes to be recognized for a job well done. Some people like more recognition than others, but it's all important on some level. It can be doubly important in the workplace, as it keeps employees happy and therefore results in a strong business that serves customers well and keeps the bottom line strong. Employee recognition can be a simple, but effective, tool.

This course looks at the value of recognizing employees and how to carry it out in the workplace, both formally and informally.

### Learning Objectives

- Define who employees are
- State why employees should be recognized
- Develop a program for employee recognition
- Implement and measure an employee recognition program

### Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                           | A Motivational Checklist               |
| Learning Objectives                                     |  |
| Pre-Assignment  |  |
| Pre-Course Assessment                                   |  |
| 2. Session 2: Employees                                 | 5. Session 5: Laying the Groundwork    |
| Who Are Your Employees?                                 | Setting the Stage                      |
| Can Employee Recognition Be Used as a Recruitment Tool? | Create a Recognition Committee         |
| Dangers, Favoritism, Costs                              | Solo vs. Group Recognition             |
| Strategies for Virtual and Remote Team Success          | 6. Session 6: The Nuts and Bolts       |
| 3. Session 3: Why Do It?                                | The Framework                          |
| Why Recognize Your Employees?                           | When                                   |
| 4. Session 4: Appreciation                              | How to Implement a Recognition Program |
| Showing Appreciation                                    | Criteria and Guidelines                |
| Where Does Recognition Overlap Just Doing Your Job?     | Levels of Recognition                  |
| Pre-Assignment Review                                   | Announcements                          |
| Expectancy Theory                                       | Forms of Recognition                   |
| To Motivate or Instigate                                | Follow up                              |
| What Can a Supervisor Do to Motivate Others?            | 7. A Personal Action Plan              |
|   | Starting Point                         |
|   | Where I Want to Go                     |
|   | How I Will Get There                   |
|   | 8. Course Summary                      |
|   | 9. Recommended Reading List            |
|   | 10. Post-Course Assessment             |



# Encouraging Sustainability and Social Responsibility in Business

## Course Overview

The ideas behind encouraging sustainability and social responsibility in business seem noble, as organizations commit to creating optimal circumstances for people to live and work. The reality is that every company, whether it is a micro-business or a large multinational corporation, can take steps to create sustainable, socially responsible environments that contribute to positive workplaces, communities, and futures.

## Learning Objectives

- Define sustainability and social responsibility
- Discuss the principles of social responsibility in business
- Apply the principles of sustainability and social responsibility in the context of ISO 26000
- Develop a program for sustainability and social responsibility in business

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                                    | Making Connections                                       |
| Learning Objectives  |  |
| Pre-Assignment   | 4. Session 4: Corporate Social Responsibility            |
| Pre-Course Assessment  | Principles   |
| 2. Session 2: What is Corporate Social Responsibility?           | Due Diligence  |
| A Business Case for Corporate Social Responsibility              | Case Studies   |
| Roles and Responsibilities                                       | Making Connections                                       |
| Business Challenges  | Protecting Human Rights                                  |
| Frame Your Business Case   | Human Rights Challenges                                  |
| Case Study   | Organizational Governance and Ethics                     |
| Do You Have To Do It All At Once?                                | ISO 26000 Principles                                     |
| Pre-Assignment Review  | Making Connections                                       |
| About the ISO 26000 Standards                                    | Operating Practices                                      |
| The International Organization for Standardization (ISO)         | Political Considerations                                 |
| Making Connections   | Human Rights and Labor Practices                         |
| 3. Session 3: Creating a Corporate Social Responsibility Program | Making Connections                                       |
| Setting Up the Project Vision                                    | 5. Session 5: Environmental Awareness and Sustainability |
| Creating the Project Plan  | Creating Community                                       |
| Engaging Stakeholders and Employees                              | Making Connections                                       |
| Objective Statements   | Consumer Issues  |
| Implementation Tips  | Community Involvement                                    |
|  | Making Connections                                       |
|  | Review the List  |
|  | Project Plan   |

6. Session 6: A Personal Action Plan
  - Starting Point
  - Where I Want to Go

- How I Will Get There
- 7. Course Summary
- 8. Recommended Reading List
- 9. Post-Course Assessment

# English as a Second Language: A Workplace Communications Primer

## Course Overview

“A different language is a different vision of life,” said the Italian filmmaker Federico Fellini. Employees who use English as a second language demonstrate great commitment and skill in learning a language other than their native tongue. There are subtle differences between languages because of social influences and workplace demands that can create or strengthen the language barrier for employees who have learned a language other than English in their formative years. That barrier is an obstacle for both employer and employee, severing what could be productive relationships with co-workers and clients. This course will identify any gaps in communication as the result of cultural language differences, and provide exercises to help connect those gaps. This course is written for employees with intermediate competency in English as their second language. Exercises will explore the four main categories of communication: Speaking, Listening, Reading and Writing.

## Learning Objectives

- Acknowledge existing skills in the areas of Speaking, Listening, Reading and Writing
- Recognize gaps in skills compared to workplace communication needs
- Understand cultural and workplace influences on communication and how to function within them
- Learn and practise effective skills for oral and written communication, including technical forms such as email and videoconferencing
- Develop an individual Action Plan for continued skill reinforcement and growth

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview                 | Productive Word Choices                   |
| Learning Objectives                           | 5. Session 5: Telephone/Videoconferencing |
| Pre-Assignment                                | Review                                    |
| Pre-Course Assessment                         | Telephone/Videoconferencing               |
| 2. Session 2: Self Awareness – Skills of Self | Telephone                                 |
| and Others                                    | Videoconferencing                         |
| Skills, Influences and Environment            | 6. Session 6: Wordsmith’s Toolbox         |
| 3. Session 3: Words and Positive Workplace    | Bones of Good Writing                     |
| Culture                                       | Parts of Speech                           |
| Language in the Workplace                     | From Words to Sentences                   |
| The Tone of the Message                       | Punctuation                               |
| Reflective Journal                            | Grammar Guidelines                        |
| 4. Session 4: Productive Conversations        | 7. Session 7: Putting Words to Work       |
| Productive Conversations                      | Good Communications                       |
| Defining Emotional Intelligence               |   |

- Ingredients of an Effective Email
- Ingredients of a Good Proposal
- Selling your Brand and Ideas
- 8. Session 8: Individual Action Planning
  - Setting your Intention
  - Building Your Plan
  - Building Your Team
  - Decision Wheel Method
- 9. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Course Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

## Enhancing Learning Experiences with UDL

### Course Overview

Universal Design for Learning (UDL) is a framework used to design, develop, and deliver inclusive educational experiences. The UDL framework guides educators to create learning that is accessible to all learners. The framework draws from physical accessibility models, neuroscience, and learning theories.

In this course, participants will engage in a comprehensive design process, utilizing the Universal Design for Learning (UDL) Framework to transform their curricula. By implementing UDL principles, they will effectively eliminate barriers to learning and optimize learner success. Throughout the course, they will gain valuable insights and practical strategies for creating accessible, engaging, and inclusive learning environments that cater to the diverse needs of all learners.

Through multiple interactive and engaging exercises using their own work, participants will discover, dream, design and deliver a renewed learning experience strategically applying UDL principles with the goal to improve student success.

### Learning Objectives

- Analyze the Principles of Universal Design for Learning (UDL) to develop a deeper understanding of how to recognize learner variability and adapt their teaching strategies to promote accessibility and engagement.
- Envision inclusive learning environments by applying your knowledge of UDL principles to envision inclusive learning environments that cater to the diverse needs of adult learners.
- Create UDL-Integrated learning experiences by incorporating UDL principles to ensure that adult learners can access, understand, and apply course content.
- Demonstrate the effectiveness of UDL-integrated learning experiences by adjusting your teaching strategies based on feedback and observation to support the diverse needs of adult learners.

### Course Outline

- |                                 |                                 |
|---------------------------------|---------------------------------|
| 1. Session One: Course Overview | UDL Think, Pair, Share Example  |
| Learning Objectives             | UDL Think, Pair, Share Activity |
| Pre-Assignment                  |                                 |
| Pre-Course Preparation          | 4. Session Four: Dream          |
| Pre-Course Assessment           | Creative Exploration            |
|                                 | Three Barrier Removal Exercises |
| 2. Session Two: UDL Refresher   | Brainstorming Exercise #1       |
| Pre-Assignment Review           | Brainstorming Exercise #2       |
| UDL Carousel Activity           | Brainstorming Exercise #3       |
|                                 | Addressing Red Flags            |
| 3. Session Three: Discovery     |                                 |
| UDL Flowchart Exercise          | 5. Session Five: Design         |

- |  |  |
|--|--|
| Designing Learning Experiences with UDL<br>in Mind | Elevator Pitch Presentation Preparation  |
| DIY Time   | Sharing Symposium - The Elevator Pitches |
| Check-in   | 7. Personal Action Plan                  |
| 6. Session Six: Deliver                            | 8. Course Summary                        |
| Presentation Prep                                  | 9. Recommended Reading List              |
|  | 10. Post-Course Assignment               |

# Entrepreneurship 101

## Course Overview

Wouldn't it be nice to be your own boss, work on your own schedule, and make money doing something that you're passionate about? Millions of people around the world are living that dream and running their own business.

This course will teach you the basics of entrepreneurship. You'll consider if entrepreneurship is right for you and learn the basic steps of creating your own business. At the end of the course, you'll have a solid foundation to start your entrepreneurial journey.

## Learning Objectives

- Identify the traits of an entrepreneur and assess your own entrepreneurial capabilities
- Outline and evaluate a business idea
- Develop a product idea
- Identify your target market and customers
- Develop your value proposition
- Understand different types of business ownership and structures
- Evaluate franchising and business purchasing opportunities
- Create a pitch deck, executive summary, company presentation, technical white paper, and business plan
- Create financial projections for your business
- Identify where to find business funding
- Create a product development plan, marketing plan, and sales strategy
- Identify ways to protect your intellectual property
- Describe effective ways to brand your product
- Choose the right location for your business
- Launch and grow your business
- Demonstrate the behaviors of an entrepreneurial leader
- Find appropriate resources to help you on your journey

## Course Outline

1. Session 1: Course Overview	Friends and Family
Learning Objectives	Books, Magazines, Industry Publications,
Pre-Assignment	and Social Media
Pre-Course Assessment	Training
2. Session 2: What It Takes to Make It	Mentors, Coaches, and Consultants
Pre-Assignment Review	Government Organizations
Traits of an Entrepreneur	Chamber of Commerce
3. Session 3: Resources to Consider	Business Groups
Introduction	Special Programs

4. Session 4: Laying the Groundwork
  - Finding Business Ideas
  - What Other Skills Do I Have?
  - What Can I Make Money At?
  - What Problems Exist?
  - What If I Already Have a Business Idea?
  - Considering the Options, Part One
  - What Other Skills Do I Have?
  - What Can I Make Money At?
  - What Problems Exist?
  - What If I Already Have a Business Idea?
  - Outlining Your Ideas
  - How Much Research Should I Do?
  - Asking Others for Their Advice
  - Making Connections
  - Considering the Options, Part Two
  - Idea One
  - Idea Two
  - Idea Three
  - Assessing Your Ideas
  - SWOT Matrix
  - Advanced Types of SWOT Analyses
  - Considering the Options, Part Three
  - Evaluating Your Capacity for Risk
  - There Are Options!
  - Caution!
5. Session 5: Building On Your Business Idea
  - Developing Your Product Idea
  - Problem Statement
  - Functional and Non-Functional Requirements
  - Features and Benefits
  - User Stories
  - Making Connections
  - Identifying Your Target Market and Customers
  - Step One: Theories
  - Step Two: Testing
  - Step Three: Take It All In
  - Developing Your Value Proposition
  - Creating Financial Projections
  - Sample Sales Process
- Things to Consider
- Part Two: Sales Metrics
  - Sample Sales Metrics: Bicycle Company
  - Sample Sales Metrics: E-Commerce Company
- Getting it Right
- Part Three: Expenses
- Part Four: Calculating Ratios
  - Operating (Net) Margin
  - Head Count per Client
6. Session 6: Business Ownership Options
  - Types of Business Ownership
  - Speaking About the Entrepreneur
  - Purchasing a Franchise
  - Where to Find Franchises and Resources?
  - Words of Warning
  - Purchasing an Existing Business
7. Session 7: Key Documents to Prepare
  - Business Plan
  - The One-Page Plan
  - The Formal Plan
  - Executive Summary
  - Polishing the Executive Summary
  - Pitch Deck
  - Sample Pitch Deck
  - How It Works
  - 30-Second Pitch
  - Pitch Template
  - Practicing the Pitch
  - White Papers
8. Session 8: Gathering Funding
  - The Basics of Financial Statements
  - The Income Statement
  - Income Statement Equation
  - Sample Income Statement
  - The Balance Sheet
  - Balance Sheet Equation
  - Balance Sheet Accounts
  - Current vs. Fixed Assets
  - Cash Flow Statement
  - Statement of Retained Earnings
  - Brainstorming Solutions



- Funding Options
- 9. Session 9: Developing Your Product
  - The Steps of Product Development
  - Idea Development
  - Planning
  - Design
  - Beta and Quality Testing
  - Limited Production and Quality Testing
  - Full Production, Quality Checks, and Product Release
  - Protecting Your Intellectual Property
  - What is Intellectual Property?
  - Following the Rules
  - What Should Be Copyrighted?
  - Is It Worth It?
  - Employee and Contractor Agreements
- 10. Session 10: Creating a Sales and Marketing Strategy
  - Introduction to Marketing
  - Cycle Overview
  - Stage One: Consumer and Market Analysis
  - The Buying Process
  - Segmentation
  - Stage Two: Analyzing the Competition and Yourself
  - SWOT Analysis
  - Next Steps
  - Stage Three: Analyzing Distribution Channels
  - The Distribution Process
  - Stage Four: Creating a Marketing Plan
  - Product
  - Price
  - Place
  - Promotion
  - Packaging
  - Making Connections
  - Stages Five and Six: Implement, Evaluate, Review, and Revise
  - Leveraging Social Media
  - Building Your Sales Force
- 11. Session 11: Branding 101
  - What Branding Is All About
  - Why a Brand?
  - What's In a Brand?
  - What is Branding, Then?
  - Why Branding is the Most Important Investment a Company Can Make
  - Developing a Slogan
  - Types of Logos
  - Letterform
  - Wordmark
  - Emblems
  - Getting Creative
- 12. Session 12: Setting Up Your Office
  - Choosing a Location
  - Finding Resources
  - Asking the Right Questions
  - The Pros and Cons of Home-Based Businesses
  - The Roaming Entrepreneur
- 13. Session 13: Launching the Business
  - Getting Off the Ground
  - The Launch
  - Setting Up Your Organizational Chart
  - First Stages of Growth
  - Next Stages of Growth
  - Recruiting and Engaging the Right People
- 14. Session 14: Keeping the Business Moving
  - Keeping Track of Your Business
  - Other Considerations
  - Growing Your Business
  - Don't Give Up!
  - Coming Out on the Other Side
- 15. Session 15: Being an Entrepreneurial Leader
  - Michael Gerber's Three Perspectives
  - Identifying the Activities
  - Working It Out
  - Case Study
  - Activity
- 16. Session 16: Bringing It All Together
  - Checklist for Success
  - Entrepreneurial Traits

Resources to Consider  
Business Groundwork  
Developing Your Product Idea  
Identifying Your Target Market and Customers  
Developing Your Value Proposition  
Creating Financial Projections  
Product Development  
Intellectual Property  
Sales and Marketing  
Branding

Choosing a Location  
Getting Off the Ground  
Setting Up Your Organizational Chart  
Keeping Track of Your Business  
Entrepreneurial Leadership Characteristics  
17. Session 17: A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
18. Summary  
19. Recommended Reading List  
20. Post-Course Assessment

# Environmental Sustainability: A Practical Approach to Greening Your Organization

## Course Overview

Environmental Management Systems (EMS) involve a set of processes and practices that enable an organization to reduce its environmental impacts and increase its operating efficiency. A well-designed EMS can help an organization address its regulatory demands in a systematic manner thereby reducing the risk of noncompliance. An EMS can also help address non-regulated issues such as pollution prevention, odor management, water usage and energy conservation.

In this course, participants will learn about EMS and how it can benefit their organization. Through the use of a Case Study and information they bring about their own company participants will leave with a draft EMS for their organization. It will include organizational Environmental Aspect and Impacts, and Objectives and Targets for their organization's significant environmental impacts.

## Learning Objectives

- Define what an Environmental Management System (EMS) is and the benefits of establishing one in your organization
- Understand 'greenwashing' and ways that your organization can avoid 'greenwashing'
- Know the six KPI areas as defined by the Eco-Management and Audit Scheme (EMAS)
- Know the steps necessary to develop an EMS
- Be able to determine the Environmental Impacts and Aspects within an organization
- Understand and apply an Environmental Significance standard to organizational Environmental Impacts
- Set Objectives and Targets for significant organizational environmental impacts

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview          | Internationally Recognized EMS -        |
| Learning Objectives                    | Eco-Management and Audit Scheme         |
| Pre-Assignment                         | (EMAS)                                  |
| Pre-Course Assessment                  | 3. Session 3: Developing an EMS         |
| 2. Session 2: Environmental Management | How to Develop an EMS                   |
| Environmental Management System (EMS)  | Steps in Developing an EMS              |
| Codes of Practice (CoP)                | 4. Session 4: Environmental Aspects and |
| Self-Declared Environment Management   | Impacts                                 |
| Systems (EMS)                          | Determining Environmental Aspects and   |
| Internationally Recognized EMS -       | Impacts                                 |
| ISO14001                               | Activities and Associated Impacts       |
| ISO14001-based EMS - Detractors        |   |

- |  |  |
|--|--|
|  | Setting Objectives and Targets           |
|  | Objectives and Targets – My Organization |
| 5. Session 5: Environmental Significance | 7. A Personal Action Plan                |
| Determining Environmental Significance   | Starting Point                           |
| Determining Environmental Significance - | Where I Want to Go                       |
| My Organization                          | How I Will Get There                     |
| Non-Significant Aspects                  | 8. Course Summary                        |
| 6. Session 6: Objectives and Targets     | 9. Recommended Reading List              |
|  | 10. Post-Course Assessment               |

# Exploring Universal Design for Learning

## Course Overview

This course is an ideal opportunity for educators looking to improve their instruction and create more inclusive and equitable learning experiences for all students.

## Learning Objectives

- Describe the UDL guidelines as an educational framework.
- Explain the purpose and rationale for UDL.
- Recognize UDL in practice.
- Identify UDL strategies.

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview              | UDL In Design, Development, And Delivery |
| Learning Objectives                          | Stage One: Design                        |
| Pre-Assignment                               | Stage Two: Development                   |
| Pre-Course Assessment                        | Stage Three: Delivery                    |
| 2. Session Two: What Is UDL?                 | UDL Curriculum Plan Activity             |
| What is UDL?                                 | Challenges to UDL                        |
| Accessibility and Equity                     | 5. Session Five: UDL Strategies          |
| Digital Technology                           | Anticipating Barriers                    |
| Learner Variability                          | What Are UDL Strategies?                 |
| Expert Learners                              | Challenge #1                             |
| What are the UDL Guidelines (The Tool)?      | Challenge #2                             |
| Level One: Networks                          | Challenge #3                             |
| Level Two: Principles                        | How Do You Apply UDL Strategies?         |
| Level Three: Guidelines                      | Case Study Challenge: Address The        |
| Level Four: Checkpoints                      | Environment                              |
| Explore the Three Guiding Principles of UDL  | 6. Session Six: Practice Makes Perfect   |
| Examples of a UDL Learning Event             | One Size Fits All                        |
| 3. Session Three: Why UDL?                   | Deconstructing the Course                |
| Why Use UDL?                                 | Post-Assignment                          |
| How Does UDL Address Barriers?               | 7. Personal Action Plan                  |
| What Happens When We Do Not Use UDL?         | 8. Course Summary                        |
| 4. Session Four: Recognizing UDL In Practice | 9. Recommended Reading List              |
| What Does UDL Look Like?                     | 10. Post-Course Assessment               |

## Facilitation Skills

### Course Overview

It is impossible to be part of an organization and not attend meetings. If you have the opportunity to "run" these meetings, how do you facilitate the team interaction, rather than control it? Facilitation skills allow you to help a group be successful and reach decisions.

### Learning Objectives

- Distinguish facilitation from instruction and training
- Identify the competencies linked to effective small group facilitation
- Understand the difference between content and process
- Identify the stages of team development and ways to help teams through each stage
- Use common process tools to make meetings easier and more productive

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | Degrees Of Support                      |
| Learning Objectives                        | 8. Session Eight: Communication Skills  |
| Pre-Assignment                             | My Shopping List                        |
| Pre-Course Assessment                      | Active Listening                        |
| 2. Session Two: Defining Your Role         | Asking Questions                        |
| Facilitation, Training, And Chairing       | Probing                                 |
| Making Connections                         | Non-Verbal Messages                     |
| Facilitation, Training, and Chairing       | Perception Reading                      |
| 3. Session Three: How Facilitators Work    | 9. Session Nine: Listening For Common   |
| Key Skills                                 | Ground                                  |
| Roles of a Facilitator                     | A Common Goal                           |
| Facilitation Skill Levels                  | 10. Session Ten: Common Facilitation    |
| Facilitation At A Glance                   | Techniques                              |
| 4. Session Four: Establishing Ground Rules | Top Techniques                          |
| Ground Rules                               | Making Connections                      |
| 5. Session Five: Content And Process       | 11. Session Eleven: Providing Effective |
| Defining Content And Process               | Feedback                                |
| 6. Session Six: Types Of Thinking          | Giving Feedback                         |
| Divergent Thinking And Convergent          | The Feedback Process                    |
| Thinking                                   | Facilitators and Feedback Language      |
| Grey Matters                               | Tips for Receiving Feedback             |
| 7. Session Seven: Handling Controversial   | 12. Session Twelve: Managing Divergent  |
| Issues                                     | Perspectives                            |
| Handling Controversial Issues              | Techniques for Success: Sequencing      |
| No Need For Black And White Thinking       | Techniques for Success: Case Study      |

- 13. Session Thirteen: Facilitation Case Study
  - Case Study
  - Background
  - Decision Question
- 14. Session Fourteen: Building Agendas
  - Developing an Agenda
- 15. Session Fifteen: Dealing With Difficult Dynamics
  - Mix And Match
  - Big Talkers
  - The Kidder
  - Exhausted and Droopy
  - Not Into It!
  - Poor Follow-Through on Assignments
  - Failure of Participants to Arrive/Return from Breaks on Time
  - Whisperers
  - 12 Easy Ways To Intervene
- 16. Session Sixteen: Building Sustainable Agreements
  - Defining a Sustainable Agreement
- 17. Session Seventeen: Stages of Team Development
  - The Five Stages
  - Making Connections
- 18. Session Eighteen: Analysis Tools
  - Swot Analysis
  - Force Field Analysis
- 19. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 20. Course Summary
- 21. Recommended Reading List
- 22. Post-Course Assessment

# Fostering Innovation

## Course Overview

Innovation is what drives companies; by coming up with new and fresh ideas, companies are able to remain relevant and drive success. Learn how companies who are considered to be innovative conduct business, and how to foster innovation in your own organization.

## Learning Objectives

- Understand what fostering innovation means
- Learn what an innovative workplace looks like
- Determine how you can help create an innovative workplace environment
- Understand your role in helping to foster innovation
- Know what happens in the workplace when you help foster innovation
- Describe ways that innovation can help your company

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                          | Systems and Processes                                      |
| Learning Objectives                                      | Types of Processes that Lead to Innovation                 |
| Pre-Assignment   | Hiring the Best  |
| Pre-Course Assessment                                    | Creative Interviewing Activity                             |
| 2. Session Two: Creating an Innovative Environment       | 6. Session Six: Is it Okay to Fail?                        |
| What Does Fostering Innovation Mean?                     | Failure in Innovation                                      |
| Creating an Innovative Environment                       | Shaping a New Mindset                                      |
| Implementing Innovation in the Workplace                 | 7. Session Seven: Innovation and Teams                     |
| 3. Session Three: Who Is Doing It Well?                  | Is Innovation a Team Sport?                                |
| Case Study: Google                                       | Diverse Teams  |
| The Best Business Activity                               | 8. Session Eight: What Happens When You Foster Innovation  |
| 4. Session Four: A Leader's Role in Innovation           | Why Is It Important to Foster Innovation in the Workplace? |
| What Does an Innovative Leader Look Like?                | Bringing it All Together                                   |
| Here Are Five Key Traits That Innovative Leaders Possess | 9. Personal Action Plan                                    |
| How to Be a Great Leader Activity                        | Starting Point   |
| Pre-Assignment Review                                    | Where I Want to Go   |
| Are You an Innovative Leader?                            | How I Will Get There                                       |
| Creating Employee Engagement                             | 10. Recommended Reading List                               |
| How to Get Employees Involved                            | 11. Post-Course Assessment                                 |
| 5. Session Five: Systems and Processes for Innovation    |  |



## Food Safety Essentials

### Course Overview

This course reviews food safety management systems, including active managerial control, HACCP, and crisis management.

### Learning Objectives

- Understand how and when to wash hands properly.
- Apply personal hygiene practices to keep food safe.
- Recall symptoms and illnesses that must be reported to a food manager.
- Recognize common time/temperature control for safety (TCS) food.
- Understand how to keep food safe during preparation, including thawing, cooking, holding, cooling, reheating, and storage.
- Calibrate and use thermometers accurately.
- Clean and sanitize utensils, equipment, and surfaces.
- Recognize and prevent common pests.

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview        | Thermometers                             |
| Learning Objectives                    | Storage                                  |
| Pre-Assignment                         | 4. Session Four: Cleaning and Sanitizing |
| Pre-Course Assessment                  | Cleaning Versus Sanitizing               |
| 2. Session Two: Personal Hygiene       | Steps to Cleaning and Sanitizing         |
| Handwashing and Hand Hygiene           | Garbage Management and Pest Control      |
| Work Attire and Practices              | 5. Personal Action Plan                  |
| Reporting Illness                      | 6. Course Summary                        |
| 3. Session Three: Time and Temperature | 7. Recommended Reading List              |
| Control                                | 8. Post-Course Assessment                |
| Food Preparation                       |  |

# Food Safety Management Systems

## Course Overview

This course reviews food safety management systems, including active managerial control, HACCP, and crisis management.

## Learning Objectives

- Understand the goal of a food safety management system.
- Use principles of active managerial control to keep food safe.
- Fulfill other responsibilities of a food manager.
- Use the seven principles of HACCP to create a HACCP plan.
- Recognize similarities and differences between HACCP and HARPC.
- Create a crisis management plan.
- Recognize imminent health hazards.

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Active Managerial Control
  - What Is a Food Safety Management System?
  - What Is a Food Safety Management System?
  - Active Managerial Control Guidelines
  - Active Managerial Control Practice
  - Other Manager Responsibilities
  - Inspections
  - Other Interventions
  - Creating a Positive Food Safety Culture
3. Session Three: HACCP Programs
  - HACCP
  - Seven HACCP Principles
  - When HACCP is Required
  - HARPC
4. Session Four: Crisis Management
  - How to Handle a Crisis
  - Foodborne Illness Outbreaks
  - Centers for Disease Control & Prevention (CDC) Foodborne Illness Response
5. Personal Action Plan
6. Course Summary
7. Recommended Reading List
8. Post-Course Assessment

## From Boss to Leader

### Course Overview

Being in charge of a department or a company does not automatically make someone a leader. Becoming a good leader involves nurturing and inspiring your team while using emotional intelligence, communicating clearly and giving them confidence to do their jobs well. This course will touch on all of this and more.

### Learning Objectives

- Know the differences between good and bad bosses
- Understand how those who hold management positions can develop into good leaders
- Recognize characteristics of good leaders
- Know the elements of leading by example
- Comprehend how to use common sense in workplace dealings
- Know why it is important to use clear communication techniques
- Understand the importance of providing effective feedback
- Understand how to apply emotional intelligence to your dealings with others

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview           | High Stakes                              |
| Learning Objectives                       | Characteristics of Effective Feedback    |
| Pre-Assignment                            | Providing Feedback                       |
| Pre-Course Assessment                     | 5. Session Five: Common Sense            |
| 2. Session Two: Good Boss versus Bad Boss | Using Common Sense                       |
| Bad Bosses                                | The Key to Successful Management         |
| Good Bosses                               | 6. Session Six: The Science Behind Good  |
| Team Player Activity                      | Leadership                               |
| 3. Session Three: The Boss as a Leader    | Be Nice, Not Tough                       |
| The Boss                                  | Work-Life Balance                        |
| Admirable Leaders                         | Negative Attitude                        |
| Behaviors of Leaders                      | Feeling Valued                           |
| Set Reasonable Goals                      | Team Building Activities                 |
| Lead, not Dictate                         | Rewards Program                          |
| Be Humble                                 | Reward Example                           |
| Be Responsible                            | Celebrating Your Team                    |
| Pick Your Battles                         | 7. Session Seven: Emotional Intelligence |
| Lead by Example                           | Displaying Emotional Intelligence        |
| Attitude is Everything                    | Fostering Emotional Intelligence         |
| 4. Session Four: Communication is Key     | Emotional Intelligence Activity          |
| Communication Skills                      | Employing Emotional Intelligence         |
| Mastering the Art of Communication        | Scenario                                 |

- 8. Session Eight: Elements of Success
  - Additional Tips
  - Taking Action
- 9. Personal Action Plan
  - Starting Point

- Where I Want to Go
  - How I Will Get There
- 10. Course Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

# Fundamentals of Writing

## Course Overview

Good writing is the basis of effective communication in today's world of email, texting, and social media. And the ability to present a message in a way that is easily understood is important if you want to achieve future success. Learn how to become a better writer in this course.

## Learning Objectives

- Write clearly, concisely, completely, and correctly
- Make sure words agree
- Recognize and use active voice
- Write proper sentences
- Use practical and inclusive language
- Use different punctuation marks
- Revise and proofread

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Why Write?
  - The Four C's of Writing
3. Session Three: Be Clear
  - Writing Clearly
  - Choosing What to Say
  - Rewriting Sentences
  - Writing Clearly Exercise
4. Session Four: Be Concise
  - Writing Concisely
  - Rewriting Exercises
5. Session Five: Be Complete
  - Making Your Writing Complete
  - Interview Exercise
6. Session Six: Be Correct
  - Correcting Common Writing Errors
  - Spot the Errors
7. Session Seven: Word Agreement
  - Making Words Agree
  - Rewriting Exercises
8. Session Eight: Active and Passive Voice
  - Passive vs. Active Voice
  - Passive Voice
  - Take Action
9. Session Nine: Sentences and Sentence Types
  - Sentences and Paragraphs
  - Identifying Sentences
  - Sentence Construction
  - Arranging Sentences
10. Session Ten: Inclusive Language
  - Make Your Language Inclusive
  - Inclusive Language Principles
  - Make it More Inclusive
11. Session Eleven: Punctuation
  - Using Common Punctuation Marks
12. Session Twelve: Revising, Spelling, and Proofreading
  - Revising
  - Check the Spelling, Grammar, and Punctuation
  - The Spell Checker Poem
  - Proofreading Tips
13. Personal Action Plan

14. Course Summary

15. Recommended Reading List

16. Post-Course Assessment

# GDPR Readiness: Creating a Data Privacy Plan

## Course Overview

The Data Privacy Plan is the best way an organization can document and enforce the privacy of personal information they hold. It puts in place procedures and guidance for how to properly handle data, respond to information requests, and deal with unexpected incidents or breaches. It contains information that applies to the day-to-day work of employees, as well as higher-level policies and guiding principles that apply to the company as a whole. The Data Privacy Plan is one of the best ways for an organization to become privacy compliant.

## Learning Objectives

- Explain what a data privacy plan will include
- Know the important terminology and legislation regarding data privacy
- Map the flow of data in an organization visually
- Understand and write an information request procedure
- Develop an internal data handling procedure
- Understand and write a data security policy
- Understand and write a personal data protection policy
- Adapt your current client privacy policy
- Develop a data breach procedure
- Decide on training solutions for data privacy
- Know the other necessary pieces of the data privacy plan
- Help your organization write, implement, and review a data privacy plan

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview             | Tips to Keep in Mind                     |
| Learning Objectives                         | Case Study Data Map                      |
| Pre-Assignment                              | Making Connections                       |
| Pre-Course Assessment                       | 5. Session Five: Information Request     |
| 2. Session Two: Writing a Data Privacy Plan | Procedure                                |
| Elements of the Plan                        | Information Request Procedure            |
| Additional Tips                             | Making Connections                       |
| 3. Session Three: Privacy Awareness         | 6. Session Six: Internal Data Procedures |
| What is Data Protection?                    | Internal Data Procedures                 |
| What is Data Privacy?                       | Making Connections                       |
| Why is Data Privacy So Important Anyway?    | 7. Session Seven: Data Security Policy   |
| What is the GDPR?                           | Data Security Policy                     |
| 4. Session Four: Data Mapping               | Making Connections                       |
| The First Step                              |  |

- 8. Session Eight: Personal Data Protection Policy
  - The Cornerstone Document
  - Contents of the Personal Data Protection Policy
  - Responsibilities for Privacy
  - Making Connections
- 9. Session Nine: Client Privacy Policy
  - Privacy Policy
  - Making Connections
- 10. Session Ten: Data Breach Procedure
  - Data Breach Procedure
  - Making Connections
- 11. Session Eleven: Training
  - Privacy Training
  - Awareness Training for All Employees
  - Specific Policy Training
  - Making Connections
- 12. Session Twelve: Other Necessary Pieces
  - Additional Pieces
- Data Processing Agreement or Data Processing Addendum (DPA)
  - Data Processing Impact Assessment (DPIA)
  - Supervising Authorities
- 13. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 14. Course Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment



## GDPR Readiness: Getting the Message Out

### Course Overview

Good communication is essential for getting your privacy message out. Your organization's employees need to know how to use privacy policies and procedures in their work. Customers also need to know your organization's stance on privacy, and to be given the information they need to make informed choices.

### Learning Objectives

- Identify methods to communicate privacy-related content internally to your team
- Develop methods to enforce internal privacy practices
- Identify the important components of a good client privacy policy
- Properly notify clients regarding policy changes
- Add a privacy policy to your website
- Develop your own cookie disclaimer banner for your website
- Modify your online web forms for better compliancy
- Develop an internal training program
- Promote a positive privacy culture in your organization

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                       | Monitoring Procedures  |
| Learning Objectives                                   | Internal Audits  |
| Pre-Assignment  | Question It Activity   |
| Pre-Course Assessment                                 |  |
| 2. Session Two: Spreading the Word Internally         | 6. Session Six: Privacy Policy Overview                          |
| Creating a Communication Plan                         | Customer Privacy Policy  |
| Tool Box Activity                                     | Missing Parts Activity   |
| 3. Session Three: Internal Training                   | 7. Session Seven: Notifying Customers                            |
| Privacy Training in the Workplace                     | Customer Notification  |
| Training for All Employees                            | What Customers Need to Know                                      |
| Specific Policy Training                              | What Companies are Doing   |
| Five Minutes of Training Activity                     | Email Assessment Activity  |
| 4. Session Four: Promoting a Positive Privacy Culture | 8. Session Eight: Web Design – Making Your Privacy Policy Public |
| The First Step  | Making Your Privacy Policy Publicly Accessible                   |
| Making Connections                                    | Privacy Positioning Activity                                     |
| 5. Session Five: Monitoring Your Privacy System       | 9. Session Nine: Web Design - Cookie Banners                     |

Cookies  
Background  
Designing Your Cookie Banner  
Cookie Time Activity  
10. Session Ten: Web Design - Forms  
Online Forms  
Making Connections

What Do You Need to Consider?  
11. Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
12. Course Summary  
13. Recommended Reading List  
14. Post-Course Assessment

## Generation Gap

### Course Overview

Most people, no matter what their age, want the same thing from their workplace: to do meaningful work and to be recognized for it. However, work and rewards may be designed differently for different people. Age is just one factor to consider.

### Learning Objectives

- Identify where the generation gap issue surfaces, and the impact it has on the modern workforce
- Describe and apply language that is specific to each generation currently in the workplace
- Explore organization strategies that overcome gap issues
- Evaluate the need and effectiveness of recruiting, retention, and succession plans in context of the generation gap

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | Personality Assessments and Generations |
| Learning Objectives                          | Having It All                           |
| Pre-Assignment                               | Making Connections                      |
| Pre-Course Assessment                        | 8. Session Eight: The Value of Planning |
| 2. Session Two: History in Brief             | Succession Planning in a Nutshell       |
| Identifying the Gap                          | Elements of Recruiting                  |
| Naming the Generations                       | Coaching and Mentoring                  |
| Additional Considerations                    | 9. Session Nine: Developing Targeted    |
| 3. Session Three: Finding Common Ground      | Retention Strategies                    |
| Common Ground                                | Retention Considerations                |
| The Role of Generations in Teams             | Continuing Work after Retirement Age    |
| Indicators of an Authentic Team              | Pulling Things Together                 |
| 4. Session Four: Silents, Boomers, X'ers,    | 10. Session Ten: What We Really Want    |
| Millennials, and Gen Z                       | Filling in the Gaps                     |
| Speaking Across Generations                  | What is the Plan?                       |
| Understanding Different Generations          | 11. Personal Action Plan                |
| 5. Session Five: Recruiting that Bridges the | 12. Course Summary                      |
| Gap  | 13. Recommended Reading List            |
| Recruiting is an Adventure!                  | 14. Post-Course Assessment              |
| Benefitting the Masses                       |   |
| 6. Session Six: Pre-Assignment Review        |   |
| How About This for a Gap?                    |   |
| Generalizations                              |   |
| 7. Session Seven: Creative Solutions         |   |
| Knowing What You Want                        |   |

## Getting Stuff Done: Personal Development Boot Camp

### *Course Overview*

Why are there so many different organizational systems and time management methods out there? The answer is simple: it's like any other personal challenge, like weight loss or money management. There is no simple, one size fits all answer. You must build a solution that works for you.

Over the course of this program, we will explore various time management and organizational tools and techniques so that you can build a customized productivity plan for your personal and professional lives. At the end of the course, you will emerge with a plan that works for you, so that you can start regaining control of your life!

### *Learning Objectives*

- Identify what personal efficiency is, what skill sets can improve your personal productivity, and what attitudes we should cultivate
- Explain why multi-tasking is a myth
- Describe what role long-term goals play in short-term efficiency
- Share a personal vision and develop dreams and goals from it
- Apply the 80/20 rule and learn how it should affect planning
- Identify the characteristics of a good organizational system
- Develop a plan for an efficient workspace, including a customized information center and a filing system
- Apply a system that will allow you to process any type of information that crosses your desk, including e-mail, electronic files, paper files, voice mail, text messages, and drop-in visitors
- Use the Eisenhower principle to prioritize work
- Say no
- Use routines to simplify your life
- Understand why you procrastinate and develop methods for tackling tasks
- Apply ideas and tools to make your household more productive and efficient

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Understanding Personal Efficiency
  - Defining Personal Efficiency
  - In the Groove
  - A Holistic Approach
  - Time Management vs. Personal Productivity
3. Session 3: Developing the Right Attitude
  - Useful Skill Sets
  - Useful Attitudes
  - Why Multi-Tasking is a Myth
4. Session 4: Laying the Foundation
  - Creating a Personal Vision Statement
  - Step One: Identifying Your Values
  - Bringing It All Together
5. Step Three: Put it all Together
  - Making Connections
  - Identifying Dreams and Setting Goals
  - Getting Some Ideas
  - SPIRIT
  - Putting it All Together
6. Session 5: The Building Blocks of a Good Organizational System
  - Pareto's Principle
  - Characteristics of a Good Organizational System
  - Building a Customizable System
7. Session 6: Creating the Right Environment
  - Garbage Out!
  - Step Two: Make an Action Plan
  - Step Three: Get Started
  - Step Four: Finish the Task
  - Laying Out Your Workspace
  - Re-Designing Your Workspace
  - Setting up a Daily System
  - Priority Tray
  - The Incubator
- Sample Incubator
- Using the Incubator
- Using the Incubator Each Day
- Setting up a Filing System
- Four File Types
- Filing Tips
- Putting Everything Back Together
- Putting it in Action
8. Session 7: Setting up your Virtual Environment
  - Organizing Electronic Files
  - Tips and Tricks
  - Making Your E-Mail Program Work for You
  - Commit to Your E-mail Program
  - Take Some Training
  - Set Up Folders
  - Schedule Backups and Archives
  - Automate What You Can
  - Use Time-Saving Tools
  - Exploring Applications
  - Top Applications
- Session 8: Setting up Your Information Management Center
  - Key Components of a System
  - Case Study
  - Making Connections
  - Lessons Learned
9. Session 9: Managing Information in Six Easy Steps
  - GOPHER It!
  - Processing E-Mail Messages
  - Digging Donald out of the Hole
  - Problem One
  - Problem Two
  - Problem Three
10. Session 10: Prioritizing Your Tasks
  - The Urgent-Important Matrix
  - Matrix Overview
  - Quadrant 1: Urgent and Important
  - Quadrant 2: Important but Not Urgent
  - Quadrant 3: Urgent but Not Important

- Quadrant 4: Not Urgent and Not Important
  - Putting Tasks in Their Place
- 11. Session 11: Saying No
  - Techniques for Saying No
- 12. Session 12: Creating Routines
  - Why Routines?
  - Start of Day Routine
  - End of Day Routine
  - Dealing with E-mail
- 13. Session 13: Stopping Procrastination Now (Not Later!)
  - Tackling Procrastination
  - A Challenge to Change
- 14. Session 14: Applying Our Lessons at Home
  - Meals
  - Exercise
  - Fun Stuff
  - Children
  - Chores
  - General Organization
- 15. Session 15: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 16. Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment

## Getting Your Job Search Started

### Course Overview

While looking for work can be an exciting time, it can also involve fear and discomfort about change and the unknown. Whether you are already in the midst of a job search or just thinking about it, this course will help you to determine what your skill set is made up of, the kind of work that is important and realistic to include in your search, and how to get started. Today's job market is not the same as it was even five years ago. Knowing where to go, who to talk to, and the opportunities that are available will help to shift you from someone who dreams about having a job, to someone who has the job they have always wanted.

### Learning Objectives

- Describe your skills, values, and beliefs about work and looking for opportunities
- Demonstrate an understanding for the types of work available to you and where to go for more information
- Recognize the differences and benefits available through career coaches, counselors, and mentors
- Apply different approaches to job searching, such as networking and tapping into the hidden job market

### Course Outline

- |                                      |                                     |
|--------------------------------------|-------------------------------------|
| 1. Session 1: Course Overview        | 4. Session 4: Skill and Ability     |
| Learning Objectives                  | The Things You Do Well              |
| Pre-Assignment                       | Identifying Your Skills             |
| Pre-Course Assessment                | Pre-Assignment Review               |
| 2. Session 2: Change and Transitions | 5. Session 5: Vocation and Strategy |
| Managing Change                      | What Does Vocation Mean?            |
| Five Aspects of Change               | Five Clues to Your Authentic Work   |
| Myths About Change                   | Preferences                         |
| Making Connections                   | Job Satisfaction Survey             |
| On the Bridge                        | Scoring                             |
| Making Connections                   | 6. Session 6: Resources             |
| Transition Phases                    | Checking Out the Jobs               |
| Making Connections                   | Resource Room                       |
| About Job Loss                       | Getting Help                        |
| 3. Session 3: The Important Stuff    | Career Development Professionals    |
| Values Check                         | Specialties                         |
| Identifying Your Values              | 7. Session 7: The Job Market        |
| Top Values                           | Job Searching Means Action!         |
| Values Defined                       | Employee Tactics                    |
| Making Connections                   | Networking                          |

- Your Contacts
- The Hidden Pieces
- Volunteer
- Do Your Research
- Self-Promotion
- Getting Creative
- Why Does the Market Hide?
- 8. Session 8: Invite Your Network
  - Identifying Your Network
  - Getting Started
  - Asking Questions
  - Developing a Script
  - Tracking Form
- 9. Session 9: Read, Set, Goal!
  - Setting Work Goals
  - SPIRIT
  - Your Goals
- Fine-Tuning Goals
- Take it Away!
- Outlining My Action Steps
- 10. Session 10: Thinking Unconventionally
  - Without Convention
  - Thinking Unconventionally, Part Two
  - Working to Get What We Want
- 11. Session 11: Getting Things Moving
  - My Next Steps
- 12. Session 12: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 13. Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment



# Giving Effective Feedback

## Course Overview

As human beings, we often hunger for feedback. However, many people will tell you that when they do get feedback, it's often because of something they have done wrong. This course is designed to help workplace leaders learn how to provide feedback any time that the message is due. Whether feedback is formal or informal, and whether it is provided to employees, peers, or someone else, there are ways that it can be structured to be effective and lasting.

This course will help students learn why the way we deliver feedback is important, how to deliver a message so that people accept it and make changes that may be needed, and how to accept feedback that we are offered.

## Learning Objectives

- Explain why feedback is essential
- Apply a framework for providing formal or informal feedback
- Use descriptive language in delivering feedback
- Describe six characteristics of effective feedback
- Provide feedback in real situations

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview          | Voice                                       |
| Learning Objectives                    | Qualities of a Good Voice                   |
| Pre-Assignment                         | Interpretation Exercise                     |
| Pre-Course Assessment                  | 5. Session 5: Characteristics of Effective  |
| 2. Session 2: Definitions              | Feedback                                    |
| Food for Thought                       | Introduction                                |
| When Feedback is Needed                | Introduction                                |
| Scenario Seven                         | Informal Feedback Framework                 |
| 3. Session 3: Speaking Clearly         | State Your Case                             |
| Being Descriptive                      | Pre-Assignment Review                       |
| 4. Session 4: Communication Strategies | 6. Session 6: Receiving Feedback Graciously |
| Introduction                           | Receiving Feedback Graciously               |
| Questioning Skills                     | 7. Session 7: Testing the Waters            |
| Good Questions                         | Scenario One                                |
| Probing                                | Scenario Two                                |
| Probing Techniques                     | Scenario Three                              |
| Non-Verbal Messages                    | 8. Session 8: A Personal Action Plan        |
| Sending the Right Message              | Starting Point                              |
| Managing Your Messages                 | Where I Want to Go                          |

How I Will Get There  
9. Summary

10. Recommended Reading List  
11. Post-Course Assessment

# Global Business Strategies

## Course Overview

Opportunities to take a regional business into the global market make it possible to strategically, smartly, and profitably accomplish more than you can by staying local. To prepare, you need to set your business up for success by being open to learning, to applying new ideas, and to continually reviewing how you can create success in the global market.

Topics such as trade financing, regulatory considerations, international business planning, sustainability, and much more are included in this course. The materials here are well suited for small and medium sized business leaders as they prepare to take their company into the global marketplace.

## Learning Objectives

- Describe the complexities of doing business in a global context
- Discuss trends in global business
- Apply strategies and tools needed to help shift a regional business into a global enterprise
- Closely evaluate your current business operation and determine its readiness for moving into a global marketplace
- Create an international business plan and prepare it for implementation

## Course Outline

- |  |                                     |
|--|-------------------------------------|
| 1. Session 1: Course Overview          | Supporting Organizations            |
| Learning Objectives                    | Making Connections                  |
| Pre-Assignment                         | Understanding Trade Agreements      |
| Pre-Course Assessment                  | How Trade Transactions Work         |
| 2. Session 2: Understanding the Global | Transactional Dealings              |
| Business Environment                   | Collaborative Transactions          |
| Defining Globalization                 | Supply Alliances                    |
| Making Connections                     | Making Connections                  |
| Factors in Globalization               | 4. Session 4: Products and Services |
| Your Presence in the Marketplace       | How Services Are Traded             |
| The Role of Human Resources            | Making Connections                  |
| Open for Business                      | Imports vs. Exports                 |
| Exercising Knowledge (Pre-Assignment   | Separating Products from Services   |
| Review)                                | How Intangible Products Fit In      |
| Top Trends                             | Contractual Entries                 |
| Take on the World                      | What's Your Value?                  |
| 3. Session 3: The Global Trade Market  | Developing Your Value Proposition   |
| Evaluating Your Options                | Mechanics of a Trade Transaction    |

5. Session 5: E-Commerce on the Global Stage
  - What is E-Commerce?
  - Making Connections
  - Protection of Information
  - Security Checklist
  - Basic E-Commerce Business Models
  - Give It A Go
  - E-Commerce Goals and Models
  - Making Connections
6. Session 6: Working in the Global Context
  - Bridging the Cultural Gap
  - Looking at Culture
  - Keeping an Open Mind
  - Stepping Over the Cultural Gap
  - Building Relationships
  - Making Connections
  - Tips for Bridging the Cultural Gap
  - Is There a Global Culture Developing?
  - Making Connections
7. Session 7: The Economics of Global Business
  - Managing Multiple Currencies
  - The Currency Conversion Process
  - Making Connections
  - Mitigating Your Risks
  - Basics of Trade Finance
  - Financing
  - Mitigating Risk
  - Export Credit Agencies
  - Documentation
  - Getting Paid
  - Trade Finance and Technology
  - Making Connections
8. Session 8: The Logistics of Global Business
  - Introduction to Supply Chain Management
  - Keys to Success
  - The Need for Excellence in Supply Chain Management
  - The Supply Chain
  - The Supply Management Leader
  - Making Connections
- Identifying and Meeting Documentation Requirements
- Packaging and Labeling
- Making Connections
- Security and Safety
- Transporting Dangerous Goods
- Seeking Out Specialists
- Negotiating Market Entry
- The Negotiation Process
- Influencing Elements
9. Session 9: Rules and Regulations
  - International Regulations
  - Public-Trade Law
  - Trade Agreements
  - Certificates of Origin
  - Extraterritoriality and Fair Trade
  - Price Cartels
  - The Role of the World Trade Organization
  - Health and Environmental Regulations
  - The Role of ECA's
  - Getting the Right Advice: The Legal Bits
  - Considering the Remedies
  - Mediation
  - Arbitration or Litigation
  - Where to Litigate
  - Government Agencies
  - Testing the Waters
10. Session 10: Beyond the Rules – Ethical Concerns
  - The Ethical Conundrum
  - Ethical Dilemmas
  - Case Studies
  - Making Connections
  - Different Points of View
  - The Friedman View
  - Cultural Relativist View
  - Righteous Moralism View
  - Making Connections
  - Corporate Social Responsibility
  - The Three Levels
  - Making Connections
  - Sustainability

- Case Studies
- Codes of Conduct
- Developing a Code of Conduct
- Making Connections
- 11. Session 11: Choosing Your Growth Strategy
  - The AAA Approach
  - Leveraging Triple A
  - Case Study
  - A Strategic Approach
  - Making Connections
- 12. Session 12: Building Your Growth Plan
  - A Business Framework
  - The Purpose of the Plan
  - Outlining the Plan
  - Global Business Plan Worksheet
  - The Planning Process
  - Planning Worksheet
  - Market Evaluation
  - Pulling the Pieces Together
  - Making Connections
- 13. Session 13: Implementing Your Growth Plan
  - Getting Your Product or Service to Global Markets
  - Creating the Right Strategy
  - Making Connections
  - Marketing Plan Worksheet
  - Exit Strategy
  - Diagnosing Issues
  - Developing Product Names
  - Case Studies
  - Color Choices
  - Summary
- 14. Session 14: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 15. Course Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment

## Goal Setting

### *Course Overview*

Goal Setting is a popular and effective course for any trainer's toolkit, as establishing and achieving goals is a hallmark of success in life. This course gives trainers access to activities and theory to help people understand how to turn their dreams or wishes into reality.

### *Learning Objectives*

- Identify what is important to you in your life
- Use goal setting activities and appropriate language to articulate what you want in your life
- Explain what your dreams and goals are for both the short and long term
- Use motivating techniques to help you reach your goals
- Understand how to deal with setbacks

### *Course Outline*

- |  |  |
|--|--|
| 1. Session One: Course Overview              | Steps To Success                         |
| Learning Objectives                          | 6. Session Six: Getting Down To Business |
| Pre-Assignment                               | Identifying Goals                        |
| Pre-Course Assessment                        | Stretch Goals and Risk Taking            |
| 2. Session Two: Pre-Assignment Review        | SMART Goals                              |
| Pre-Assignment Review                        | My Dreams And Goals                      |
| 3. Session Three: Self Understanding         | 7. Session Seven: Getting Started Today  |
| Understanding The Importance Of Goal Setting | Ready, Set, Go!                          |
| Choosing A Mentor                            | Prioritizing Tools                       |
| Making Connections                           | Visualization Techniques                 |
| 4. Session Four: Laying The Foundation       | Support Systems                          |
| Creating Your Personal Vision Statement      | Action Planning And Follow-Through       |
| Step One: Identify Your Values               | Motivators                               |
| Step Two: Define Your Values                 | 8. Session Eight: Dealing With Setbacks  |
| Step Three: Put It All Together              | Coping Strategies                        |
| A Closer Look                                | 9. Personal Action Plan                  |
| Where Our Values Live                        | Starting Point                           |
| Food for Thought                             | Where I Want to Go                       |
| 5. Session Five: What Is In Your Bucket?     | How I Will Get There                     |
| The Bucket Principle                         | 10. Course Summary                       |
| Digging Deeper Into The Bucket               | 11. Recommended Reading List             |
|  | 12. Post-Course Assessment               |

# Growth Hacking

## Course Overview

The new economy calls for a new way of attracting customers and sales. Growth hacking is a system of rapid growth for start-up companies, with a goal of sharing a message and making a sale. This course will teach you how to tap into this method, learning how to create your own growth hacking plan.

## Learning Objectives

- Identify the growth hacking mindset
- Recognize the differences between growth hacking and marketing.
- Identify the customer need your business can fill
- Create and implement product placement and services to fit the need
- Learn and practice techniques of growth hacking
- Review and practice growth marketing strategies
- Identify the essentials of conversion and optimization
- Create your own growth hacking plan

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Learning the Mindset
  - Growth Hacking Defined
  - Growth Hacking Recap
  - Mantras of a Growth Hacker
  - The Customer is Always Right
  - An Example
  - The Result
  - Making Connections: A Growth Recipe
3. Session Three: Framing the Need
  - The Relationship
  - Understanding Your Customers
  - Making Connections: Who, What, How
  - Product Market Fit (PMF)
  - Consider the Example of Airbnb
  - The Key to Their Success?
  - Making Connections: What Do You Know?
  - Understanding Your Company
  - Making Connections: Sourcing Feedback
  - Making Connections: Digesting Feedback
4. Session Four: Making the Match
  - Making the Match in Growth Hacking
  - Relationships Reviewed
  - Strengthening Relationships
  - The Customer Is Always Right
  - Making Connections: Get the FAQs
  - Building an Effective Audience
  - The Size of Your Audience
  - Making Connections: An Enduring Outlook
  - Elements of Negotiation
  - Traits of a Negotiator
  - Social and Emotional Intelligence
  - Making Connections: Positive Outcome
  - Unique Selling Proposition (USP)
  - Making Connections: Your USP
5. Session Five: Going Live
  - Process Steps
  - Making Connections: Workplan
  - Development
  - Reaching Customers: The Storefront
  - Making Connections: Making it Look Good
  - Reaching Customers: The Signage
  - Making Connections: Getting Noticed

- Reaching Customers: The Action Plan
- Creating a Project Plan
- Work Structure Breakdown
- Making Connections: Creating a Plan for Success
- Organizing the Tasks
- Your Growth Hacking Outline
- 6. Session Six: Maximizing Results
  - The Path to Growth Hacking Success
  - Defining Success
  - Key Phrases
  - Learning to Experiment
  - An Experiment in Tech
  - An Experiment in Sweets
  - An Experiment in Words
  - Steps to Developing a Successful Experiment
- 7. Session Seven: Optimizing and Moving Forward
  - Optimizing
  - Ingredients for Optimization
  - Examining your Ingredients
  - Making Connections: Task Check
  - Resources and Inspiration
  - Searching for More Information Activity
- 8. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 9. Course Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment



## Hazards in the Flow of Food

### Course Overview

This course reviews hazards in the flow of food, including cross-contamination and time-temperature abuse.

### Learning Objectives

- Understand the flow of food
- Define cross-contamination
- Identify the types of cross-contamination
- Know practices to prevent cross-contamination
- Recognize the temperature danger zone
- Identify how to prevent time-temperature abuse
- Recognize different types of thermometers and how to use them
- Understand how to calibrate a thermometer

### Course Outline

- |                                    |                               |
|------------------------------------|-------------------------------|
| 1. Session One: Course Overview    | Time-Temperature Abuse        |
| Learning Objectives                | How to Prevent                |
| Pre-Assignment                     | Time-Temperature Abuse        |
| Pre-Course Assessment              | Temperature Monitoring        |
| 2. Session Two:                    | Scenario                      |
| Cross-Contamination                | Types of Thermometers         |
| Flow of Food                       | Bimetallic Stemmed            |
| Pre-Assignment Review              | Thermometers                  |
| What is Cross-Contamination?       | Thermocouples and Thermistors |
| Person-to-Food                     | Infrared Thermometers         |
| Food-to-Food                       | Other Temperature Recording   |
| Surface-to-Food                    | Devices                       |
| Example of Cross-Contamination     | How to Calibrate Thermometers |
| Preventing Cross-Contamination     | Ice-Point Method              |
| Purchase from Approved             | Boiling-Point Method          |
| Suppliers                          | How to Use Thermometers       |
| Separate Raw and Ready-to-eat      | Cleaning and Sanitizing       |
| Food                               | 4. Personal Action Plan       |
| Clean and Sanitize                 | 5. Course Summary             |
| Practice Good Personal Hygiene     | 6. Recommended Reading List   |
| 3. Session Three: Time-Temperature | 7. Post-Course Assessment     |
| Control                            |                               |

# Hiring for Success: Behavioral Interviewing Techniques

## Course Overview

Interviewing sounds easy enough: you arrange for a conversation between you and potential candidates, and then select the best person for a particular position. But what if you could refine the process in such a way that you were confident that you are selecting the right person? How do you separate the good from the great, when they have similar work experience and strengths to offer? This course will give you the skills and tools to hire successful candidates.

## Learning Objectives

- Recognize the costs incurred by an organization when a wrong hiring decision is made
- Develop a fair and consistent interviewing process for selecting employees
- Prepare better job advertisements and use a variety of markets
- Be able to develop a job analysis and position profile
- Use traditional, behavioral, achievement oriented, holistic, and situational (critical incident) interview questions
- Enhance communication skills that are essential for a skilled recruiter
- Effectively interview difficult applicants
- Check references more effectively
- Understand the basic employment and human rights laws that can affect the hiring process

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                     | Principles for Exploring Past Actions            |
| Learning Objectives                               | Three Areas to Explore                           |
| Pre-Assignment                                    | 5. Session 5: Cost Analysis                      |
| Pre-Course Assessment                             | Cost Analysis                                    |
| 2. Session 2: History of the Interviewing Process | Costs to Consider                                |
| History of the Interviewing Process               | Calculating the Cost                             |
| Stress Interviews                                 | 6. Session 6: Job Analysis and Position Profiles |
| Advocating Structured Interviews                  | Understanding the Job                            |
| Behavioral Interviews                             | Job Analysis                                     |
| 3. Session 3: The Recruitment & Selection Process | Job Analysis Worksheet                           |
| The Six-Stage Process                             | Position Profiles                                |
| Making Connections                                | Categories in a Job Description                  |
| 4. Session 4: Factors in the Hiring Process       | Sample Description                               |
| The Three Factors                                 | 7. Session 7: Determining the Skills You Need    |
| 8. Session 8: Finding Candidates                  | Technical Skills                                 |
|   | Performance Skills                               |
|   | Introduction                                     |

- File Searches
- Internal Searches
- Placement Services
- Referral Programs
- Third Party Recruiters
- Headhunters
- Internet
- Advertise
- Thinking Out of the Box
- 9. Session 9: Advertising Guidelines
  - Five Key Points
  - Other Tips
  - Ten Tests for Advertising
- 10. Session 10: Screening Resumes
  - The Screening Process
  - Resume Rating Guide
  - Explanation of the Rating Guide
  - Using the Screening Guide
  - Developing a Guide
- 11. Session 11: Performance Assessments
  - The Value of Performance Assessments
  - Technical Exercises
  - Advantages of Technical Exercises
  - About Performance-Based Exercises
  - Identifying Performance-Based Exercises
  - Creating Performance-Based Exercises
  - Completing the Assessment
- 12. Session 12: Problems Recruiters Face
  - Problems Recruiters Face
- 13. Session 13: Interviewing Barriers
  - Introduction
- 14. Session 14: Non-Verbal Communication
  - Non-Verbal Communication
  - Making Connections
- 15. Session 15: Types of Questions
  - Types of Questions
  - Open Questions
  - Some Useful Questions
  - Probing Techniques
- 16. Session 16: Case Study
  - Background
  - Position Description
  - Sample Resume
  - Interview Transcript
  - Discussion Questions
- 17. Session 17: Traditional vs. Behavioral Interviews
  - Traditional vs. Behavioral Interviews
  - The Behavioral Interviewing Model
  - Tips and Tricks
  - Purpose of Behavioral Interviewing
  - Other Advantages of Behavioral Interviewing
  - Sample Behavioral Interviewing Questions
  - Sample Questions
- 18. Session 18: Other Types of Questions
  - Introduction
  - Achievement-Oriented Questions
  - Holistic Questions
  - Making Connections
- 19. Session 19: The Critical Incident Technique
  - The Critical Incident Technique
  - Theories Behind the Critical Incident Technique
  - Sample Critical Incident Questions
- 20. Session 20: Listening for Answers
  - Listen Well
  - Responding to Feelings
  - Reading Cues
  - Demonstration Cues
  - Committing to Change
- 21. Session 21: Difficult Applicants
  - Sample BDI Questions
  - Difficult Applicants: Silent Sam
  - Betty Bluff
  - Slippery Sue
  - Talkative Tom
- 22. Session 22: Interview Preparation and Format
  - Interview Preparation
  - Before the Interview
  - Setting the Agenda
  - During the Interview

- Length of Interview and Panel Size
- Closing the Interview
- 23. Session 23: Other Interview Techniques
  - Using Superlatives
  - Moving Through the Questions
  - Staying Positive
  - Good Note-Taking
  - Interruptions
  - Signposts
- 24. Session 24: Scoring Responses
  - Performance-Based Rating Scales
- 25. Session 25: Checking References
  - Checking References
  - Reporting the Results
- The Changing Nature of References
- 26. Session 26: Human Rights
  - Human Rights
- 27. Session 27: Skill Application
  - Making Connections
- 28. Session 28: Pre-Assignment Review
  - Pre-Assignment Review
- 29. Session 29: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 30. Summary
- 31. Recommended Reading List
- 32. Post-Course Assessment

## Honing and Delivering Your Message

### Course Overview

This one-day course will prepare students to develop a message and remain on topic when they are presenting that message to the media and public without straying from the point, or points, they want to make. The final session will give students the opportunity to craft and hone a message of their own.

### Learning Objectives

- To effectively communicate a message and deliver a point in all forms of communication
- To present ideas to a group or use social media to share a message
- How to become a better spokesperson

### Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview              | Reading Cues                                |
| Learning Objectives                        | Demonstrating Listening                     |
| Pre-Assignment                             | 6. Session 6: What is Your Body Saying?     |
| Pre-Course Assessment                      | What is Your Body Saying?                   |
| 2. Session 2: What is Your Message?        | Use Nonverbal Communication                 |
| What is Your Message,                      | The Value of a Pause                        |
| How to Present Your Message: Who is Your   | Attitude                                    |
| Target Audience?                           | 7. Session 7: Presenting Your Message to an |
| 3. Session 3: Ways to Present Your Message | Audience                                    |
| Brainstorming                              | The Elevator Pitch                          |
| Choosing a Communication Route             | 8. A Personal Action Plan                   |
| 4. Session 4: Delivering Your Message in a | Starting Point                              |
| Different Way                              | Where I Want to Go                          |
| Pre-Assignment Revisited                   | How I Will Get There                        |
| 5. Session 5: Effective Listening          | 9. Course Summary                           |
| What is Active Listening?                  | 10. Recommended Reading List                |
| Responding to Feelings                     | 11. Post-Course Assessment                  |

# How to Become a Leader with Integrity

## Course Overview

Becoming a Leader with Integrity offers an inspiring, motivating and engaging way to inspire your employees, helping to transform them to achieve performance beyond expectations, and inspiring them to lead teams more effectively. An organization with integrity is also a more profitable one, so using this course to bring authenticity and honesty into the conversation not only empowers employees to unleash their potential but also makes your business more profitable in the long-term, too.

## Learning Objectives

- Understand why integrity makes a powerful, lasting impact
- Recognize and use the four 'I's of transformational leadership
- Practice better self-leadership
- Measure and develop your authenticity and transformational leadership
- Develop charismatic behaviors and improve your skills of persuasion
- Learn how to transform others

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | What is Transformational Leadership?      |
| Learning Objectives                          | Transformational Leadership Questionnaire |
| Pre-Assignment                               | The Four 'I's                             |
| Pre-Course Assessment                        | Sales Pitch                               |
| 2. Session Two: Deep Impact                  | Action Plan                               |
| What is Integrity?                           | 6. Session Six: Mission to Mars           |
| Case Studies                                 | Mission To Mars Challenge                 |
| Integrity and Authenticity                   | Curveball                                 |
| Two Leaders                                  | 7. Session Seven: Charisma: Inspire and   |
| Case Study Questions                         | Motivate                                  |
| 3. Session Three: Self-Leadership            | What is Charisma?                         |
| What is Self-Leadership?                     | The Dark Side of Charisma                 |
| Do Well - Do Better                          | Charismatic People                        |
| Best Habits                                  | Case Studies                              |
| 4. Session Four: The Ripple Effect           | Ten Fast Facts About Charisma             |
| What is the Ripple Effect?                   | 8. Session Eight: The Art of Persuasion   |
| Case Study 1                                 | Key Behaviors of Charismatic              |
| Case Study 2                                 | Communication                             |
| Positive Ripple Effects                      | A Great Story                             |
| 5. Session Five: Transformational Leadership | Persuasion Practice                       |
|  | Adding Some Flair                         |

- 9. Session Nine: One-on-Ones: Transforming Others
  - Practice Using Today's Tools
  - Acting as A Mentor: Action Plan
- 10. Personal Action Plan
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# How to Build Community in the Workplace

## Course Overview

A strong sense of community in the workplace leads to deeper connection, better collaboration, and a more positive environment for everyone. Trust and open communication form the foundation, helping teams navigate challenges and work together effectively. Inclusion and belonging ensure that every voice is heard and valued. Celebrating achievements reinforces a culture of appreciation and support. When these elements come together, they create a workplace where people feel motivated, respected, and part of something meaningful.

This course will introduce you to the basic concepts of building community at work and provide you with the skills to implement these strategies in your own organization.

## Learning Objectives

- Define community and explain its value in a workplace.
- Create intentional opportunities for colleagues to build deeper workplace relationships.
- Describe the elements that form a foundation of trust in the workplace.
- Apply techniques to improve communication, reduce bias, and foster inclusion.
- Meaningfully recognize and celebrate the accomplishments and contributions of staff.
- Develop an action plan to strengthen the community within your team or department.

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview         | Foundation of Trust                         |
| Learning Objectives                     | Case Study                                  |
| Pre-Assignment                          | 5. Session Five: Fostering Inclusion and    |
| Pre-Course Assessment                   | Belonging                                   |
| 2. Session Two: Understanding Workplace | Understanding Inclusion                     |
| Community                               | Facilitating Growth                         |
| Defining Community                      | 6. Session Six: Recognizing and Celebrating |
| A Culture of Belonging                  | Achievements                                |
| 3. Session Three: Creating Connections  | Types of Recognition                        |
| Building Workplace Relationships        | 7. Session Seven: Action Planning           |
| 4. Session Four: Building trust and     | Pulse check                                 |
| Communication                           | Making a Plan                               |
| 8. Personal Action Plan                 | 9. Course Summary                           |
|   | 10. Recommended Reading List                |
|   | 11. Post-Course Assessment                  |



# Human-Centered Leadership

## Course Overview

Human-centered leaders do not simply manage their employees. They empower and guide their teams to success in ways that traditional leadership cannot. Human-Centered Leadership will equip participants with the necessary knowledge and key skills to lead with empathy. This course will explore core characteristics of human-centered leadership as well as demonstrate how to create inclusive workplaces. Additionally, the course will provide tools for navigating change and uncertainty while maintaining team engagement and morale.

## Learning Objectives

- Understand the principles and values of human-centered leadership
- Use emotional intelligence skills to lead with empathy and understanding
- Lead a diverse and inclusive workplace through human-centered practices
- Build trust and improve communication with teams
- Guide teams through change while maintaining morale and engagement

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                           | Encouraging Collaboration Across Differences           |
| Learning Objectives                                       |  |
| Pre-Assignment  | 5. Session Five: Trust and Communication               |
| Pre-Course Assessment                                     | Building Trust and Accountability                      |
| 2. Session Two: Introduction to Human-Centered Leadership | Open and Transparent Communication                     |
| Defining Human-Centered Leadership                        | Making Connections                                     |
| The Role of Empathy in Leadership                         | Giving and Receiving constructive Feedback             |
| 3. Session Three: Emotional Intelligence in Leadership    | Making connections                                     |
| The Components of Emotional Intelligence                  | 6. Session Six: Leading Through chance and Uncertainty |
| Empathy in Practice                                       | Understanding the Impact                               |
| Managing Emotions in Challenging Situations               | Sustaining Engagement and Morale                       |
| Building Emotional Resilience                             | 7. Personal Action Plan                                |
| 4. Session Four: Creating an Inclusive Environment        | 8. Course Summary                                      |
| Understanding diversity, Equity, and Inclusion            | 9. Recommended Reading List                            |
| Reducing Unconscious Bias in Leadership                   | 10. Post-Course Assessment                             |
| Promoting Psychological Safety                            |  |

# Human Resources Training: HR for the Non-HR Manager

## Course Overview

In today's fast-moving world, many managers and supervisors are expected to deal with some human resources issues. They may be asked to take part in developing job descriptions, take part in interviews, or take responsibility for disciplinary issues. This course will introduce those managers to human resources concepts, from the hiring process, to performing a skills inventory and conducting the interview; discuss orientation; and cover some issues that may arise after the hiring (such as diversity issues, compensation, and discipline).

## Learning Objectives

- Discuss current issues in the human resource field and the changing role of supervisors and managers in terms of HR functions
- Write job specifications and identify core competencies
- Apply methods of finding, selecting, and keeping the best people using behavioral description interviewing techniques
- Get new employees off to a good start
- Understand compensation and benefits
- Maintain healthy employee relations
- Make performance appraisals a cooperative process

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview          | 6. Session Six: Identifying Job Competencies  |
| Learning Objectives                      | Introduction                                  |
| Pre-Assignment                           | 7. Session Seven: Position Profiles and Job   |
| Pre-Course Assessment                    | Descriptions                                  |
| 2. Session Two: Defining Human Resources | Definitions                                   |
| The Basics of HR Management              | My Position Profile                           |
| Case Study: Expansion Staffing           | 8. Session Eight: Do You Really Need to Hire? |
| 3. Session Three: Performing a Skills    | Evaluate all Options                          |
| Inventory                                | The Real Cost of Employee Turnover            |
| Skills Inventory                         | 9. Session Nine: Finding Candidates           |
| 4. Session Four: Forecasting Techniques  | Methods and Considerations                    |
| Forecasting                              | 10. Session Ten: Advertising Guidelines       |
| 5. Session Five: Job Analysis            | What to Include                               |
| Understanding Job Analysis               | 11. Session Eleven: Screening Resumes         |
| Performing an Analysis                   | Using a Resume Screening Guide                |
| Job Analysis Formats                     | Developing a Resume Screening Guide           |

12. Session Twelve: Preparing for the Interview
  - Preparation Checklist
13. Session Thirteen: Conducting the Interview
  - The Interviewing Process
  - An Objective Interview
  - Basics of Behavioral Interviewing
  - Purpose of Behavioral Interviewing
  - Asking Questions
  - Provocative Statements
  - Sample Behavioral Description Interview Questions
  - Developing Behavioral Description Interview Questions
  - The Critical Incident Technique
  - Sample Critical Incident Questions
  - Creating a Critical Incident
14. Session Fourteen: After the Interview
  - Post-Interview Checklist
15. Session Fifteen: Employee Orientation and Onboarding
  - Why is Onboarding and Orientation Important?
  - How Did Your Orientation Rate?
  - Avoiding problems
  - Planning the Orientation Program
16. Session Sixteen: Follow the Leader
  - Follow the Leader
17. Session Seventeen: Planning Training
  - The Training Cycle
  - Internal vs. External Training
18. Session Eighteen: Working with External Providers
  - Criteria and Considerations
19. Session Nineteen: Performance Reviews
  - Performance Review Problems
  - A Performance Management Checklist
  - Dissecting a Performance Review
  - Identifying Behaviors
20. Session Twenty: Attendance Management
  - The Cost of Absenteeism
  - The Case of Gretchen Washington
  - Dealing with Attendance Management
21. Session Twenty-One: Managing a Diverse Workforce
  - Diversity
  - Making Connections
  - Your Experience with Pigeon Holes
22. Session Twenty-Two: Privacy Issues
  - Ten Key Principles
23. Session Twenty-Three: Compensation and Benefits
  - The Role of Compensation and Benefits
  - Pre-Assignment Review
  - Case Study: It is Not You, It is Me
24. Session Twenty-Four: Managing
  - The Four Step Disciplinary System
25. Session Twenty-Five: Terminating Employees
  - Terminating Staff Members
  - Case Study: How to Fire an Employee?
26. Session Twenty-Six: Exit Interviews
  - Exit Interviews
27. A Personal Action Plan
28. Summary
29. Recommended Reading List
30. Post-Course Assessment

# Identifying and Combatting Fake News

## Course Overview

In this day and age, it's becoming increasingly important to learn how to recognize fake news and deal with it if necessary.

## Learning Objectives

- Define 'fake news'
- Recognize the difference between 'fake news' and objective reporting
- Understand the impacts of 'fake news' on your organization
- Examine proactive strategies and how they work
- Learn reactive strategies and why they are essential
- Discover opportunities for promotion and growth within 'fake news'
- Create your own 'fake news' action plan

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview             | Making Connections: Newsfeed Search       |
| Learning Objectives                         | Forums for Your Audience                  |
| Pre-Assignment                              | Making Connections: Storefront Review     |
| Pre-Course Assessment                       | 5. Session Five: Deconstructing Fake News |
| 2. Session Two: Evolution of 'The Truth'    | Deconstructing Fake News                  |
| The Truth                                   | Making Connections: A Fake News           |
| Pre-Assignment Review                       | Encounter                                 |
| Fake News Defined                           | Separating Fact from Fiction              |
| Making Connections: Your Thoughts           | Making Connections: Real or Fake          |
| The Media Safety Valve                      | 6. Session Six: Coping with a Crisis      |
| Making Connections: Your Advisors           | Coping with a Crisis                      |
| 3. Session Three: The Challenge of 'Social' | From Crisis To Opportunity                |
| What is the Purpose of the Media?           | Crisis Defined                            |
| Then a Few Things Happened...               | Shrinking the Target                      |
| Making Connections: Social                  | Making Connections: Reaction Time         |
| Communication                               | Staying Clear of the Smear                |
| Feeding the Machine                         | Real Versus Fake Revisited                |
| Making Connections: Your Advisors           | 7. Session Seven: Proactive Approaches    |
| 4. Session Four: Life of a Target           | Letting Social Media Serve You            |
| Links in the Chain                          | Understanding Your Customers              |
| The Audience                                | A Closer Look at Customers Activity       |
| How Fake News Spreads                       | Relationships Reviewed                    |
| You as a Link                               | The Customer Is Always Right,             |
| Abundance Mentality                         | Making Connections: A Look at Methods     |
| Making Connections: Power of Persuasion     | Examining Your Ingredients                |
| Understanding Your Company                  | Making Connections: Checklist             |

Reaching Out Online  
Making Connections: Reaching Out  
Maintaining the Momentum  
Your Fake News Reaction Online  
8. Personal Action Plan

Starting Point  
Where I Want to Go  
How I Will Get There  
9. Course Summary  
10. Recommended Reading List  
11. Post-Course Assessment

# Implementing AI in Your Workplace

## Course Overview

Artificial Intelligence (AI) is transforming the way businesses operate through streamlining processes and unlocking new forms of value across every industry. However, successful AI adoption requires more than just selecting a tool; it demands careful planning, strategic alignment, and thoughtful change management.

This course provides a practical introduction to implementing AI in organizational settings, focusing on how leaders and teams can prepare for AI-driven transformation. Implementing AI in Your Workplace equips professionals with the knowledge and tools to lead the adoption of AI technology in their organization. Participants will explore how to identify opportunities for AI to improve efficiency, align technology solutions with business objectives, and measure the return on investment.

## Learning Objectives

- Understand key concepts in AI and machine learning.
- Identify business functions where AI can create value.
- Evaluate and select AI tools and technologies that best fit business needs.
- Address challenges related to change management, upskilling, and ethical use of AI.
- Develop a high-level AI strategy that aligns with organizational priorities.
- Monitor and measure the effectiveness of AI tools using key performance indicators.
- Create a step-by-step plan for implementing AI technologies in their workplaces.

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview               | Preparing for AI Adoption                   |
| Learning Objectives                           | 7. Session Seven: Developing an AI Strategy |
| Pre-Assignment                                | Creating a Clear Strategy                   |
| Pre-Course Assessment                         | Review                                      |
| 2. Session Two: Defining AI                   | Overcoming Ethical Challenges               |
| AI Basics                                     | 8. Session Eight: Evaluating AI Tools and   |
| Applying AI Across Industries                 | Vendors                                     |
| 3. Session Three: The Business Case for AI    | Key AI Tools for Businesses                 |
| Driving Progress with AI                      | Selecting the Right Solution                |
| Case Study                                    | 9. Session Nine: Measuring the ROI of AI    |
| Myths and Misconceptions                      | Monitoring the AI System                    |
| 4. Session Four: AI Use in Business Functions | 10. Session Ten: Action Plan Development    |
| Exploring AI Applications                     | Strategy Development                        |
| 5. Session Five: Mapping AI Solutions to      | Putting the Plan Into Action                |
| Business Problems                             | 11. Personal Action Plan                    |
| Identifying Inefficiencies                    | 12. Course Summary                          |
| 6. Session Six: Building an AI-Ready Culture  | 13. Recommended Reading List                |

## 14. Post-Course Assessment

# Influence and Persuasion

## Course Overview

When we talk about influence and persuasion, we often talk about marketing and sales. However, we influence in many ways and with great frequency. If you want a raise, sometimes you need to persuade your boss. If you want to convince your team to adopt a change, help your staff make choices, or choose the best place for lunch, there is often influences taking place. This course will help participants learn how to influence and persuade in a variety of areas.

## Learning Objectives

- Make decisions about using persuasion versus manipulation
- Apply the concepts of pushing and pulling when influencing others
- Describe different techniques for getting persuasive conversations and presentations underway
- Make a persuasive presentation by using the 5 S's
- Apply storytelling techniques to extend influence
- Leverage concepts of neuro linguistic programming in everyday influence and persuasion

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview          | Make Sure the Receiver is Ready             |
| Learning Objectives                    | Apply Positive Intent                       |
| Pre-Assignment-Article                 | Words to Watch Out For                      |
| Pre-Assignment-Questions               | Your Inner Self Talk                        |
| Pre-Course Assessment                  | Frame of Reference                          |
| 2. Session 2: Understanding Persuasion | Suspending Belief                           |
| How Persuasion Works                   | 4. Session 4: Getting Off on the Right Foot |
| Predictability                         | Building Rapport                            |
| Reciprocation                          | About Rapport                               |
| Consistency and Commitment             | Establish and Maintain Rapport              |
| Social Evidence                        | Matching and Mirroring                      |
| Authority                              | Body Language                               |
| Liking                                 | Voice Characteristics                       |
| Scarcity                               | Pacing                                      |
| Self-Interest                          | Scenario One                                |
| Pre-Assignment Review                  | Scenario Two                                |
| 3. Session 3: Preparing to Persuade    | Leading                                     |
| Pushing and Pulling                    | 5. Session 5: Presentation Strategies       |
| Communicating with Confidence          | Five Points for Any Presentation            |
| Have a Purpose                         | The Five S Framework                        |
| Have an Outcome                        | Preparing with the Five S Pattern           |



6. Session 6: Using Stories to Persuade
  - The Importance of Story
  - Stories Have to Make You Stand Out
  - Your Story has to be Believable
  - Storytelling Works When it Makes Something More
  - Have a Beginning, Middle, and End
  - Be Conscious of Our Attention Span
  - Storytelling Time
7. Session 7: Using Neuro Linguistic Programming
  - Defining Neuro Linguistic Programming
  - Neuro + Linguistic + Programming =
  - So What Does it Mean?
  - A Brief History
- Understanding Common NLP Terms
- Embedding Positive or Negative Commands
- Storytelling Time
- Influencing Outcomes
- Presuppositions as Questions
- Insightful Sentences
8. Session 8: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
9. Summary
10. Recommended Reading List
11. Post-Course Assessment

# Intermediate Project Management

## Course Overview

Project management is not just restricted to certain industries, or to individuals with certification as a project manager. Lots of us are expected to complete assignments that are not a usual part of our job, and to get the job done well, within our budget, and on time. This course is intended for those who understand the conceptual phase of a project's life cycle, including setting goals, creating a vision statement, and creating the Statement of Work. This course will take you through the remaining three stages: planning, execution, and termination.

## Learning Objectives

- Identify your project's tasks and resources
- Order tasks using the Work Breakdown Structure
- Schedule tasks effectively
- Use basic planning tools such as a Gantt chart, PERT diagram, and network diagram
- Prepare a project budget
- Modify the project budget and schedule to meet targets
- Identify and manage risks
- Prepare a final project plan
- Execute and terminate a project
- Develop and manage a change control process

## Course Outline

- |   |                                     |
|---|-------------------------------------|
| 1. Session 1: Course Overview               | 4. Session 4: Scheduling Techniques |
| Learning Objectives                         | Preparing a Basic Schedule          |
| Pre-Assignment                              | Gathering Resources                 |
| Pre-Course Assessment                       | Formula for Estimating Time         |
| 2. Session 2: What Really Needs To Be Done? | Sample Estimation Table             |
| Where Do We Start?                          | Other Scheduling Factors            |
| Case Study                                  | Scheduling Checklist                |
| Sample Resource List                        | Planning Tool Options               |
| How Far Do You Go?                          | Activity Scheduling                 |
| Sample Cost List                            | Planning Tools                      |
| No One Works For Free!                      | Action Planning Worksheets          |
| Pete's Cost List                            | Milestone Charts                    |
| 3. Session 3: The Work Breakdown Structure  | PERT Diagrams                       |
| About Milestones                            | Along the Critical Path             |
| About the Work Breakdown Structure          | Gantt Charts                        |
| Sample WBS                                  | Computer-Created Gantt Charts       |
|   | Creating a Gantt Chart              |

- Network Diagrams
- Sample Network Diagram
- Five Steps to Create a Network Diagram
- Other Things to Know about Network Diagramming
- Tips and Tricks
- Flow Charts
- Sample Flow Chart
- 5. Session 5: Budgeting Tips and Tricks
  - Budgeting Basics
  - Estimation Techniques
  - Gathering Information
  - Budgeting Challenges
  - Sample Template
  - Pete's Budget
- 6. Session 6: Assessing Project Risks
  - Understanding Risks
  - Common Risks
  - Planning for Risk
- 7. Session 7: Preparing the Final Plan
  - Planning Checklist
  - Additional Documents
  - Master Chart Sample
- 8. Session 8: Making it Fit
  - Schedule and Budget Compression
  - Compressing the Budget
  - Notes
  - Case Study
  - Budget Template
- 9. Session 9: The Execution Phase
  - Key Tasks
  - Maintaining the Rhythm
  - The 95% Phenomenon
- 10. Session 10: Controlling Changes
  - A Basic Process
  - Sample Change Request Form
- 11. Session 11: Closing Out a Project
  - Preparing for Closing
  - Checklist of Tasks
  - Lessons Learned
- 12. Session 12: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 13. Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment

# Internet Marketing

## Course Overview

This course is an ideal start for business owners and people who are new to marketing to learn the basics of internet marketing. It contains information on how to market online, and even more importantly, how to measure the results. This enables figuring out whether the target market is being reached, where qualified prospects are located, and how they are engaged as a result of these efforts. This course includes sessions on search engine optimization, email campaigns, pay per click advertising, and more.

## Learning Objectives

- Determine how your Internet marketing strategy fits with an overall marketing plan
- Apply techniques to influence and engage the target market
- Weigh the value of using a distribution service for email marketing campaigns
- Get started with search engine optimization
- Use online advertising to boost marketing results
- Adjust the internet marketing plan based on metrics and reporting

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                       | Getting the Message Out                          |
| Learning Objectives                                   |  |
| Pre-Assignment  | 6. Session Six: Search Engine Optimization (SEO) |
| Pre-Course Assessment                                 | What is SEO?                                     |
| 2. Session Two: What is Internet Marketing?           | Understanding Search                             |
| What it Looks Like                                    | The Search Engines                               |
| Popular Strategies                                    | Optimizing Keywords                              |
| 3. Session Three: Creating an Internet Marketing Plan | Monitoring Search Engine Ranking                 |
| Leveraging What is Already in Place                   | 7. Session Seven: Advertising Online             |
| The Marketing Process                                 | What is Advertising?                             |
| 4. Session Four: Extending Influence                  | Review and Reflect                               |
| Sharing Messages                                      | What Service Should I Use?                       |
| Making Connections                                    | 8. A Personal Action Plan                        |
| Making it Real  | 9. Course Summary                                |
| 5. Session Five: Email Marketing                      | 10. Recommended Reading List                     |
| Leveraging Opportunities                              | 11. Post-Course Assessment                       |

# Intrapreneurship

## Course Overview

Intrapreneurship has been described as a great way to make beneficial changes to your organization. People can choose to continue with the status quo, or they can work to make a difference in the lives of themselves and others within the company.

Who wants to feel empowered and recognized for their innovative and creative ideas?

Who wants to make a difference? If you answered yes to these questions, then this course will help you become energized and ready to push your ideas forward. After you complete this course, you will have ways to get started and implement your plans.

## Learning Objectives

- Understand the importance of intrapreneurship in today's economy
- Identify the characteristics of an intrapreneur and assess your own strengths
- Create an intrapreneurial team within your organization
- Understand the process of intrapreneurship
- Develop a new product or process idea
- Understand the importance of a sales strategy
- Create a start-up financial statement

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                    | Sponsor                                       |
| Learning Objectives                              | Senior Management                             |
| Pre-Assignment                                   | Making Connections                            |
| Pre-Course Assessment                            | 6. Session 6: Are You an Intrapreneur?        |
| 2. Session 2: What Is Intrapreneurship?          | Self-Assessment                               |
| Making Connections                               | Debrief                                       |
| 3. Session 3: Why Is Intrapreneurship Important? | Considering Our Strengths                     |
| The Growth of Intrapreneurial Culture            | Important Intrapreneurial Strengths           |
| Developing Flexibility                           | 7. Session 7: Becoming an Intrapreneur        |
| Paving the Way for Success                       | Building Intrapreneurial Skills               |
| History of Intrapreneurship                      | Avoiding Common Mistakes                      |
| Making Connections                               | 8. Session 8: Creating and Selling Your Ideas |
| 4. Session 4: Characteristics of Intrapreneurs   | The Intrapreneurial Process                   |
| What Makes Intrapreneurs Tick?                   | The Nine Stages                               |
| Making Connections                               | How Do I Know If I Have a Good Idea?          |
| Characteristics of Intrapreneurs                 | Making Connections                            |
| 5. Session 5: Picking Your Team                  | Idea One                                      |
| The Intrapreneur                                 | Idea Two                                      |
| The Manager                                      | Idea Three                                    |
| Team Members                                     | Screening the Ideas                           |
|  | Questions to Anticipate                       |

- Sample Screening Chart
- Selling Your Ideas
- Tips and Tricks
- 9. Session 9: Pre-Assignment Review
  - Making Connections
  - Following Up
- 10. Session 10: The Implementation Plan
  - Introduction
  - Description of Your Idea
  - People Affected by the Process or Product
- Methods of Selling Your Product or Process
- Financial Projections
- Making Connections
- Sample Income Statement
- 11. Session 11: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 12. Summary
- 13. Recommended Reading List
- 14. Post-Course Assessment

# Introduction to E-Mail Marketing

## Course Overview

E-mail marketing is here to stay, and knowing how to do it well is essential for marketers as well as small business owners, coaches, and consultants. In this course you'll learn the essentials of planning, creating, and delivering exceptional e-mail marketing campaigns that support your overall marketing strategy. After this course, you will be able to reach more clients and potential clients through your efforts at being an e-mail influencer.

## Learning Objectives

- Apply the concepts of e-mail marketing to grow the influence and reach of a business
- Analyze the different applications of e-mail marketing
- Select a campaign strategy that will help you increase your reach
- Apply a defined strategy to get the best out of every e-mail campaign
- Track and analyze the results of an e-mail campaign

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                     | Can I Send E-mail Marketing Messages From My Personal E-Mail?                          |
| Learning Objectives                               |  |
| Pre-Assignment                                    | 4. Session 4: The Tools  |
| Pre-Course Assessment                             | Setting Up A Plan  |
| 2. Session 2: Getting to Know E-mail Marketing    | What's the Cost?   |
| What is E-Mail Marketing?                         | Choosing an E-Mail Marketing Provider  |
| Goals of E-Mail Marketing                         | Your Guide to Success  |
| The Evolution of E-Mail Marketing                 | Getting Started  |
| Advantages of E-Mail Marketing                    | Get Practical  |
| Glossary of Terms                                 | 5. Session 5: Designing Your Campaign Strategy   |
| History of E-Mail Marketing                       | Looking at Your Campaign Strategy  |
| Modern Day Challenges                             | Making Connections   |
| Where Does E-Mail Marketing Fit?                  | What's Your Campaign Strategy?   |
| Getting It Right                                  | What Works?  |
| Why Do People Get Frustrated by E-mail Marketing? | Making Connections   |
| 3. Session 3: Setting Up Your Audience            | Going Beyond the Basics  |
| Gathering Contacts                                | Case Study   |
| Developing Your Form                              | Why Would You Want the Same Content Published on Your Blog Post as in Your Newsletter? |
| Case Studies                                      | 6. Session 6: Crafting Messages for Each Campaign                                      |
| Can I Buy E-mail Addresses?                       | Pre-Assignment Review  |
| Rules and Regulations                             |  |
| Staying Current                                   |  |

- Crafting Your Message
- The Message IS The Message
- Designing an Eye-Catching E-Mail
- Case Studies
- Choosing the Right Design
- Design the Layout
- Sample Template
- Layout Considerations
- Content Considerations
- Making Connections
- Make This Easy
- 7. Session 7: Good Habits Get Optimal Results
  - Be a Good E-Mailer
  - Smart Rules Apply
  - Conversions
  - The Conversion Process
  - Don't Panic!
  - What's Your Opinion?
  - The Who and The How
  - Developing Different Types of Content
- 8. Session 8: What to Write
  - Give People What They Want
  - Google AdWords Keyword Planner
  - Using Ads to Attract Your Audience
  - Be Green...Evergreen That Is!
  - Evergreen Topics
- Seasonal Topics
- Building Off of the Topics
- Idea Starters
- Tips and Tricks
- Let's Get to Work
- 9. Session 9: Subject Lines and Action Calls
  - Great Subject Lines
  - Action Items
  - Use Strategy with Your Call to Action
- 10. Session 10: If It Doesn't Get Measured, It Can't Be Counted
  - Key Metrics
  - Revenue Per E-Mail Sent
  - Timing Your E-Mail Message
  - Test Before You Send
  - Split Testing
- 11. Session 11: Test Driving
  - Making Connections
  - Writing Your Initial Welcome E-Mail
- 12. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 13. Course Summary
- 14. Recommended Reading List
- 15. Post-Course Assessment



# Introduction to Neuro Linguistic Programming

## Course Overview

Your brain, thoughts, and behavior are at the core of everything that you do every day, even if you aren't aware of it. In order to truly achieve the results that you want to achieve, you must master the art of bringing your unconscious thoughts to the surface, so that you can have real choice over how you interact with and respond to the world. Neuro linguistic programming can give you the tools to do just that.

In this introductory course, you will learn the basics of neuro linguistic programming. We will give you the tools to manage your thoughts, and thereby manage yourself.

## Learning Objectives

- Define neuro linguistic programming (NLP) and its key terms
- Describe the key presuppositions of NLP
- Describe the five senses as seen by NLP
- Identify states of mind and modes of thinking using predicates and visual cues
- Develop and refine response strategies for any situation
- Use enriched language to engage your audience
- Interpret body language based on NLP principles
- Ask clean, precise questions to get the information you need
- Use hypnotic language and positive commands to get results

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview<br>Learning Objectives<br>Pre-Assignment<br>Pre-Course Assessment  | 5. Session 5: Using Enriched Language<br>Using Enriched Language<br>Connecting with Everyone   |
| 2. Session 2: What is Neuro-linguistic Programming?<br>Defining Neuro-linguistic Programming<br>So What Does It All Mean?<br>A Brief History<br>Understanding Common NLP Terms | 6. Session 6: Interpreting Body Language<br>The Signals We Send<br>Interpreting Body Language<br>Associated or Dissociated<br>Towards or Away From<br>Match or Mismatch<br>Internally or Externally Oriented<br>Using Body Language to Influence |
| 3. Session 3: The NLP Presuppositions<br>Core NLP Principles   | 7. Session 7: Asking Clean Questions<br>The NLP Style of Questioning<br>Using Clean Questions<br>Sample NLP Question Frameworks  |
| 4. Session 4: The Senses According to NLP<br>Making Sense of Our Senses<br>Using Our Sensory Systems<br>Sensory Predicates<br>Senses and Language<br>Eye Accessing Cues        | 8. Session 8: The Power of Hypnotic Language<br>Embedding Positive or Negative<br>Commands   |

- Creating Commands
- Influencing Outcomes
- Presuppositions as Questions
- Insightful Sentences
- Overcoming Challenges
- 9. Session 9: Putting it all Together
- Case Study
- 10. Session 10: A Personal Action Plan
- Starting Point
- Where I Want to Go
- How I Will Get There
- 11. Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Inventory Management: The Nuts and Bolts

## Course Overview

No business can survive very long without an effective program of controls over the parts and materials that are used in producing or distributing goods and services of the firm. Like many other things that depend on human interpretation, “control” means different things to different individuals.

This is an introductory course for you, the warehouse or stockroom manager, the person in charge of what comes in and goes out of your company. You want a smooth and cost-effective operation, with enough products on hand to satisfy needs without stockpiling too much. This course will discuss all aspects of inventory management, including common terms, the inventory cycle, how to maintain inventory accuracy, and what some of the latest trends are.

## Learning Objectives

- Understand terms that are frequently used in warehouse management
- Identify the goals and objectives of inventory management and measure your process against these goals
- Calculate safety stock, reorder points, and order quantities
- Evaluate inventory management systems
- Identify the parts of the inventory cycle
- Better maintain inventory accuracy

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview          | Reducing Costs                           |
| Learning Objectives                    | Your Customers                           |
| Pre-Assignment                         | Hiring and Training Staff                |
| Assessing Your Results                 | Hiring Tips                              |
| Pre-Course Assessment                  | Key Skill Areas for Inventory Management |
| 2. Session 2: What is Inventory?       | Staff                                    |
| Definitions                            | 5. Session 5: Setting Up the Warehouse   |
| Why Is Inventory Management Important? | The Eight Objectives                     |
| Goals of Inventory Management          | Making Connections                       |
| Glossary                               | Maintaining Location Accuracy            |
| Pre-Assignment Review                  | Types of Locations within a Warehouse    |
| 3. Session 3: Types of Inventory       | Location Identification Methods          |
| Types of Inventory                     | Maintaining Location Accuracy            |
| Classes of Inventory                   | 6. Session 6: What Makes a Good System?  |
| 4. Session 4: Key Players              | Requirements for Inventory Management    |
| The Role of Your Customers             | Systems                                  |

- 7. Session 7: The Warehouse Inventory Cycle
  - Inventory Stages
  - The Product Cycle
- 8. Session 8: Identifying Demand
  - Key Formulas
  - How to Calculate Order Quantities
  - How to Set Reorder Points
  - How to Set Safety Stock Levels
  - Case Study
- 9. Session 9: The Receiving Process
  - The Receiving Process
  - Handling Damaged Goods
  - Establishing Policies
- 10. Session 10: Validating Inventory
  - Validating Inventory
- 11. Session 11: The Put-Away Process
  - The Put-Away Process
- 12. Session 12: Maintaining Inventory
  - Accuracy
  - Degree of Control
- Inventory Control Methods
- Product Identification Methods
- Inventory Counting Methods
- 13. Session 13: The Outbound Process
  - The Outbound Process
  - Packing Process
  - Loading and Shipping Process
- 14. Session 14: Industry Trends
  - Introduction
  - Cross-Docking
  - Third Party Warehousing
  - Just-in-Time Completion
  - Online Access
- 15. Session 15: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 16. Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment

## Keeping Food Safe

### Course Overview

This course reviews aspects of foodborne illness. This includes types of hazards and practices to prevent foodborne illness.

### Learning Objectives

- Recognize why foodborne illness is dangerous
- Identify physical, biological, and chemical hazards
- Recognize common pathogens
- Avoid the five major risk factors for foodborne illness
- Practice proper time and temperature requirements
- Avoid cross-contamination
- Clean and sanitize properly
- Identify highly susceptible populations
- Identify which foods are more at risk for spreading foodborne illness

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                          | Time-Temperature Abuse                         |
| Learning Objectives                                      | Passing Through the Danger Zone                |
| Pre-Assignment   | Cooking or Reheating                           |
| Pre-Course Assessment                                    | Cooling  |
| 2. Session Two: Foodborne Illness                        | Cross-Contamination                            |
| Challenges to Food Safety                                | Pre-Assignment Review                          |
| Workers  | Poor Personal Hygiene                          |
| Controlling Pathogens                                    | Poor Cleaning and Sanitizing                   |
| Customers  | Time/temperature Control for Safety (TCS) Food |
| The Cost of Foodborne Illness                            | Ready-to-Eat Food                              |
| How Foodborne Illnesses Occur                            | Identifying High-Risk Foods                    |
| Identifying Common Pathogens                             | Populations at High Risk of Foodborne Illness  |
| How Foodborne Illnesses Occur                            | Key Practices for Ensuring Food Safety         |
| Chemical Hazards   | 4. Personal Action Plan                        |
| Identifying Allergens on Labels                          | 5. Course Summary                              |
| Physical Hazards   | 6. Recommended Reading List                    |
| Identifying Hazards Scenarios                            | 7. Post-Course Assessment                      |
| How Food Becomes Unsafe                                  |  |
| 3. Session Three: Practices Related to Foodborne Illness |  |

# Kickstarting Your Business with Crowdsourcing

## Course Overview

Today's fast-paced marketplace demands that businesses think fast. Crowdsourcing can help all types of businesses keep on top of trends and stay competitive. This course will show you how to leverage all types of crowdsourcing (including microwork, macrowork, crowdvoting, crowdcontests, crowdwisdom, and crowdfunding) to kickstart your business' growth.

## Learning Objectives

- Define what crowdsourcing is and its value to businesses
- Determine when crowdsourcing makes sense for a project
- Describe the crowdsourcing process
- Identify platforms and social media tools that can support your crowdsourcing campaigns
- Describe the major types of crowdsourcing, including microwork, macrowork, crowdvoting, crowdcontests, crowdwisdom, and crowdfunding
- Attract and engage your crowd

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                      | Site Two                                     |
| Learning Objectives                                | Site Three                                   |
| Pre-Assignment                                     | 5. Session 5: Types of Crowdsourcing         |
| Pre-Course Assessment                              | About Crowd voting and Crowdcontests         |
| 2. Session 2: What Is Crowdsourcing?               | Case Studies                                 |
| What Crowdsourcing Is and Where It Came From       | Microwork and Macrowork                      |
| A Brief History                                    | What is Microwork?                           |
| Pre-Assignment Review                              | Advantages and Disadvantages                 |
| The Business Value of Crowdsourcing, Part One      | Crowdsearching                               |
| Is Crowdsourcing Right For You?                    | Case Studies                                 |
| When Crowdsourcing Isn't Right                     | Microwork and Macrowork as a Hobby           |
| The Reliability Problem                            | Crowdwisdom                                  |
| 3. Session 3: The Crowdsourcing Process            | Case Studies                                 |
| Process Overview                                   | About Crowdfunding                           |
| Looking at the Stages                              | Case Studies                                 |
| 4. Session 4: Choosing Your Crowdsourcing Platform | Case Study                                   |
| Identifying the Options                            | Case Study Answers                           |
| Popular Platforms                                  | 6. Session 6: Social Media and Crowdsourcing |
| Checking Out the Sites                             | Using Social Media to Crowdsourc             |
|  | 7. Session 7: Engaging the Crowd             |
|  | It's All About the Crowd                     |

- 8. Session 8: Test Driving
  - Test Driving
  - Our Top Tips
- 9. A Personal Action Plan
  - Starting Point

- Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

# Knowledge Management

## Course Overview

Understanding how to manage the knowledge within your organization is the key to business success. Mismanagement of organizational knowledge comes with a price: frustrated employees, angry customers, and decreased productivity. All of these things can affect our business' bottom line. The purpose behind knowledge management is to help us bridge organizational gaps and to use our greatest asset (our knowledge) to take our business performance to the next level. The theory of knowledge management has emerged to help us harness and enhance both the individual and collective brain power of our businesses. This course will introduce you to knowledge management tips, techniques, and proven processes.

## Learning Objectives

- Define knowledge and knowledge management
- Explain the difference between explicit and tacit knowledge
- Identify various knowledge management theoretical models
- Explain how a properly implemented knowledge management program can improve efficiency
- Describe the steps for employing a new knowledge management program in an organization
- Identify the required components for implementing a knowledge management framework within an organization

## Course Outline

- |                                  |                                       |
|----------------------------------|---------------------------------------|
| 1. Session 1: Course Overview    | Going Global                          |
| Learning Objectives              |                                       |
| Pre-Assignment                   | 3. Session 3: The Business Case for   |
| Making Connections               | Knowledge Management                  |
| Pre-Course Assessment            | Reducing Costs and Growing Sales with |
|                                  | Knowledge Management                  |
| 2. Session 2: Definitions        | How Knowledge Management Can Help     |
| Defining Knowledge               | Reduce Costs                          |
| Tacit Versus Explicit Knowledge  | How Knowledge Management Can Help     |
| Communicating Explicit and Tacit | Grow Sales                            |
| Knowledge                        | Personal Work Performance and Bottom  |
| Defining Knowledge Management    | Line Benefits                         |
| Case Studies                     | Business Case Basics                  |
| Summary                          | What to Include in Your Business Case |
| Lessons Learned                  | Sample Knowledge Management Business  |
| History of Knowledge Management  | Case                                  |
| Karl-Erik Svelby                 | Cost of Recommended Program or Change |



- Executive Summary
- 4. Session 4: The Knowledge Management Mix
  - People
  - Company Directory
  - Establish a Best Practice Database
  - Communities of Practice
  - Tips for Developing a Community of Practice within an Organization
  - Breaking Down the Model
  - Summary
  - Recognition within the Knowledge Management Mix
  - Technology
  - Process
  - Explicit Knowledge Processes
  - Using a Content Management System
  - Content Management System
  - Considerations
  - Tacit Knowledge Processes
- 5. Session 5: The Knowledge Management Framework
  - Introduction
  - Needs Analysis
  - How Do I Conduct A Needs Analysis?
  - Stage One: Define Your Research
  - Stage Two: Collect Data
  - Stage Three: Analyze Data
  - Stage Four: Present What You Have Found
  - Stage Five: Plan for the Future
  - Resource Identification
  - Steps for Resource Identification
  - Breaking Down the Phases
  - Process Analysis, Identification, and Construction
  - Process Checklist
  - Making Connections
  - Implementing New Processes
  - Accumulating, Sharing, and Storing Knowledge
- 6. Session 6: ITandD's Conundrum
  - Introduction
  - Questions
- 7. Session 7: Knowledge Management Models
  - The KM Process Framework (Bukowitz and Williams)
  - Model Overview
  - Breaking Down the Model
  - Knowledge Management Matrix (Gamble and Blackwell)
  - Breaking Down the Model
  - Case Study
  - Process Model (Botha)
  - Breaking Down the Model
  - Case Study
  - Knowledge Spiral Model (Nonaka and Takeuchi)
  - Case Study
  - Summary of the Models Presented
- 8. Session 8: The Knowledge Management Toolkit
  - Cross-Functional Teams
  - Making Connections
  - Case Study
  - Mentoring
  - Making Connections
  - Defining Mentorship
  - Organizational Culture: Making Connections
  - Making Connections
  - Zappos
  - Zappos Culture
  - Zappos Family Core Values
  - Summary
  - Making Connections
  - Grow Your Culture to Support Your Initiative
  - Tips for Crafting a Knowledge-Sharing Culture
  - IT Solutions

- Summary
- Which Technologies Would Be Best?
- Questions
- 9. Session 9: Implementing Knowledge Management Initiatives
  - Building Knowledge Networks
  - How to Build Knowledge Networks
  - Creating a Knowledge Management Body of Knowledge (KMBOK)
  - Making Connections
  - What Is a Body of Knowledge? What Is a KMBOK?
  - Steps to Create Your Organization's KMBOK
  - Creating a Chief Knowledge Officer (CKO) Position
  - What Is a Chief Knowledge Officer?
  - What Is a Chief Knowledge Officer Responsible For?
  - Hire Internally or Externally?
  - Advertise for Your CKO
  - Creating a Post-Mortem Plan
  - Benefits of Post Mortems
  - How to Conduct a Post Mortem
  - After the Post Mortem
- Creating Measures
  - Introduction
  - Plan to Measure
  - What to Measure
  - Ways to Measure
  - Start With a Pilot
  - Steps to Creating a Pilot Program
  - Benefits of a Pilot Program
  - Possible Benefits of a Pilot Program
  - Where Do I Put This?
  - Choosing a Location
  - Centralized Organizations
  - Decentralized Organizations
  - You Have A Place – Now What Do You Need?
  - Support Your Organization Through the Change
  - Tips for Organizational Change
- 10. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 11. Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

## Leadership Skills for Supervisors

### Course Overview

Supervisors are the crucial interface between the employee on the shop floor or the service desk and the managers of the organization. Although they often have more technical experience than the employees they supervise, some may not have a lot of leadership experience. This one-day course will provide the skills in communication, coaching, and managing conflict that are necessary for success.

### Learning Objectives

- Learn ways to prioritize, plan, and manage your time
- Identify your primary leadership style
- Develop some flexibility to use other leadership styles
- Determine ways you can meet the needs of employees and co-workers through communication and coaching
- Explore ways to make conflict a powerful force for creative, well-rounded solutions to problems

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | Lessons to Learn                          |
| Learning Objectives                        |   |
| Pre-Assignment                             | 5. Session Five: Understanding Leadership |
| Pre-Course Assessment                      | About Leadership                          |
| 2. Session Two: Pre-Assignment Review      | The Situational Leadership II® Model      |
| Making Connections                         | Understanding Your Comfort Zone           |
| 3. Session Three: What's Your Type? How    | Choosing Our Style                        |
| About Mine?                                | Managing Performance                      |
| Seeking Information                        | Making Connections                        |
| Identifying Your Characteristics and       | Servant Leadership                        |
| Preferences                                | Making Connections                        |
| Questionnaire                              | 6. Session Six: Manage Your Time and Your |
| Analyzing the Results                      | Energy                                    |
| Mostly A's – Inquiring Rationals           | Introduction                              |
| Mostly B's – Authentic Idealists           | Time Management Tips                      |
| Mostly C's – Organized Guardians           | Larks and Owls                            |
| Mostly D's – Resourceful Artisans          | Our Top Time Management Tip               |
| What's Important?                          | 7. Session Seven: The Commitment Curve    |
| Debrief                                    | Onboarding and Orientation                |
| 4. Session Four: Introversion/Extroversion | The Big Picture                           |
| Questionnaire                              | Stages of the Curve                       |
| Using the Continuum                        | Stage One: Uninformed Optimism            |
| Case Study                                 | Stage Two: Informed Pessimism             |
|  | Stage Three: Hopeful Realism              |

- Stage Four: Informed Optimism
- Summary
- What Can Be Done to Bridge the Commitment Gap?
- 8. Session Eight: Employee Development Models
  - The Coaching Model
  - Step One: Frame a Conversation
  - Step Two: Create Opportunities
  - Step Three: Create an Action Plan
  - Step Four: Give Feedback
  - The Dialogue Model
  - I Messages
  - The Consequences and Benefits Matrix
- 9. Session Nine: Dealing with Conflict and Difficult Issues
  - Reflection
  - Conflict
  - Conflict Resolution Styles
  - Techniques for Resolving Conflict
- 10. Session Ten: What Successful Leaders Do
  - Secrets to Success
  - List of Practices
  - Making Connections
  - Creating the Right Environment
- 11. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 12. Course Summary
- 13. Recommended Reading List
- 14. Post-Course Assessment

# Lean Process Improvement

## Course Overview

Lean principles have come a long way over the past 300 years. From Benjamin Franklin's early ideas, to Henry Ford's work in the 1920s and the Toyoda precepts in the 1930s, to Jeffery Liker's publication of *The Toyota Way* in 2004, Lean processes have evolved from a simple concept to a set of widely used best practices.

This course will give participants the foundation to begin implementing Lean process improvement tools in their workplace. The first part of the course will explore the foundations of Lean through the Toyoda precepts and the five critical improvement concepts (value, waste, variation, complexity, and continuous improvement). The second part of the course will give participants tools to perform continuous improvement in their organization, including 5S, 5W-2H, PDSA, DMAIC, Kaizen, Genchi Genbutsu, and various Lean data mapping methods.

## Learning Objectives

- Define Lean and its key terms
- Describe the Toyota Production System and the TPS house
- Describe the five critical improvement concepts
- Use the Kano model to understand, describe, analyze, and improve value
- Identify and reduce various types of waste
- Create a plan for a more environmentally Lean organization
- Use the PDSA and R-DMAIC-S models to plan, execute, and evaluate Lean changes
- Use Lean thinking frameworks, including 5W-2H, Genchi Genbutsu and Gemba
- Prepare for and complete a basic 5-S process
- Describe the key elements of Kaizen events, particularly a Kaizen blitz
- Gather, analyze, and interpret data using flow charts, Ishikawa (fishbone) diagrams, SIPOC diagrams, and value stream maps
- Go back to your organization with a plan to begin incorporating Lean into your corporate culture

## Course Outline

- |                                    |  |
|------------------------------------|--|
| 1. Session One: Course Overview    | Lean vs. Six Sigma                             |
| Learning Objectives                | Pre-Assignment Review                          |
| Pre-Assignment                     | A Lean Glossary                                |
| Pre-Course Assessment              |  |
| 2. Session Two: Understanding Lean | 3. Session Three: The Toyota Production System |
| Defining Lean                      | Overview of the Liker Pyramid                  |
| The History of Lean                | Parts of the Pyramid                           |
| The Automobile Industry            | Exploring the Philosophy                       |
| Modern Thinkers                    | Considering the Processes                      |

- Challenging Our Partners at Acme Wholesalers
- Understanding People and Partners
- Problem Solving Tools
- 4. Session Four: The Toyota Production System House
  - Model Overview
  - The Roof
  - The Pillars
  - The Core
  - The Foundation
- 5. Session Five: The Five Critical Improvement Concepts
  - Key Ideas
  - Case Study
  - Task
- 6. Session Six: Understanding Value with The Kano Model
  - Breaking Down the Model
  - Example: New Car
- 7. Session Seven: Types of Waste
  - The Three Categories
  - Making Connections
- 8. Session Eight: Creating a Lean Enterprise
  - The Characteristics of a Lean Organization
  - 20 Keys
  - Going Green with Lean
- 9. Session Nine: The Plan, Do, Study, Act (PDSA) Cycle
  - Model Overview
- 10. Session Ten: Using the R-DMAIC-S Model
  - R-DMAIC-S
  - R-DMAIC-S and PDSA
- 11. Session Eleven: Lean Thinking Tools
  - 5W-2H
  - Genchi Genbutsu and Gemba
  - Implementing the 5S Method
  - Preparing for 5S
- 12. Session Twelve: Kaizen Events
  - About Kaizen and Kaizen Events
  - Typical Kaizen Blitz Workflow
  - Personal Reflection
- 13. Session Thirteen: Data Gathering and Mapping
  - Flow Charts
  - Types of Symbols
  - Creating the Flow Chart
  - Sample Flow Chart
  - Making Breakfast
  - Ishikawa (Cause and Effect) Diagrams
  - SIPOC Diagrams
  - Sample SIPOC
  - Value Stream Maps
  - Sample Value Stream Map
  - Tips for Effective Data Analysis
- 14. Session Fourteen: A Plan to Take Home
  - Roadblocks and Pitfalls
  - Common Problems
  - Creating a Successful Organizational Structure
  - Process Overview
  - Breaking Down the Model
  - Where To Get Started?
  - A Plan for Success
- 15. Personal Action Plan
- 16. Course Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment

# Leveraging Neurodiversity at Work

## Course Overview

Embracing neurodiversity in the workplace means recognizing that each person's brain works in a unique and valuable way. These variations come with individual needs and addressing them helps each person succeed and thrive. Companies that intentionally recruit and support neurodivergent individuals gain a competitive edge by harnessing the unique perspectives and strengths of individuals with diverse cognitive approaches. This course will introduce neurodiversity and its importance for employers. It will demonstrate how organizations can improve workplace practices to be more inclusive for neurodivergent individuals, and ultimately, better support all employees.

## Learning Objectives

- Display a foundational understanding of neurodiversity and its relevance in the workplace.
- Understand the value of embracing different ways of thinking and learning.
- Address and dispel preconceived assumptions and stereotypes about neurodivergence.
- Acknowledge sensory processing differences and respect individual communication preferences.
- Develop neuroinclusive workplace practices, including recruitment and onboarding.
- Help create a supportive and inclusive work environment for neurodivergent employees.
- Employ best practices for assembling and managing neurodiverse teams.

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview              | 4. Session Four: Sensory and Communication Differences |
| Learning Objectives                          | Sensory Processing                                     |
| Pre-Assignment                               | Preventing Sensory Overload in the Workplace           |
| Pre-Course Assessment                        | Communication  |
| 2. Session Two: Understanding Neurodiversity | 5. Session Five: Adapting Workplace Practices          |
| What is Neurodiversity?                      | Inclusive Recruitment                                  |
| Neurodiversity Definitions and Terms         | Inclusive Onboarding                                   |
| Benefits of Neurodiversity                   | Supporting Neurodivergent employees                    |
| Influential Figures                          | Pre-Assignment Review                                  |
| A Business Case for Inclusion                |  |
| 3. Session Three: Myths and Misconceptions   |  |
| Addressing Stereotypes                       |  |

6. Session Six: Building a Supportive Culture  
Encouraging Empathy
7. Session Seven: Leading by Example  
The Role of Managers  
Providing Feedback
8. Session Eight: Driving Innovation  
Neurodiversity Supports Creative Solutions
9. Session Nine: Creating Neurodiverse Teams  
Case Studies
- Best Practices
10. Session Ten: Developing Career Pathways  
Creating Growth Opportunities
11. Session Eleven: Action Planning  
Drafting a Plan  
Creating Your Action Plan
12. Personal Action Plan
13. Course Summary
14. Recommended Reading List
15. Post-Course Assessment



# Logistics and Supply Chain Management

## Course Overview

The supply chain is a crucial part of any business' success. Optimizing the flow of products and services as they are planned, sourced, made, delivered, and returned can give your business an extra competitive edge.

This course will introduce you to the basic concepts of supply chain management, including the basic flow, core models, supply chain drivers, key metrics, benchmarking techniques, and ideas for taking your supply chain to the next level.

## Learning Objectives

- Define supply chain management and logistics
- Explain the vertical integration and virtual integration models
- Understand the stages in the basic supply chain flow
- Identify participants in the supply chain
- Recognize supply chain drivers and ways to optimize them
- Align supply chain strategy with business strategy
- Determine what metrics to track and how to benchmark the related data
- Troubleshoot basic supply chain problems
- Identify ways to develop your supply chain, such as using third-party logistics providers (3PL's), insourcing processes, developing sustainable and eco-friendly strategies, leveraging process improvement strategies, and adopting new techniques

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                   | Making Connections                       |
| Learning Objectives                             | Participants in the Supply Chain         |
| Pre-Assignment                                  | Designing Your Supply Chain              |
| Pre-Course Assessment                           | The Bullwhip Effect                      |
| 2. Session 2: Getting Started                   | Case Study                               |
| Defining the Terms                              | What Causes the Bullwhip Effect?         |
| What is Supply Chain Management?                | How Do You Minimize the Bullwhip Effect? |
| The Six Rights                                  | 5. Session 5: Supply Chain Drivers       |
| Not Just for Products                           | Driving Success                          |
| Regulations and Resources                       | Choosing the Right Transportation        |
| Resources to Consider                           | Methods                                  |
| 3. Session 3: The Evolution of the Supply Chain | United States                            |
| Vertical Integration Model                      | Europe                                   |
| What's Next?                                    | Japan                                    |
| 4. Session 4: The Basic Supply Chain Structure  | Australia                                |
| The Links in the Supply Chain                   | Making Connections                       |

6. Session 6: Aligning Your Supply Chain with Business Strategy
  - Identifying Your Market: Introduction
  - Understanding Your Market Type
  - Identifying What Your Market Wants and Needs
  - Making Connections
  - Looking at Your Role
  - Identifying Your Role in the Supply Chains
  - Analyzing the Data
  - Sample SWOT
  - Taking the Next Steps
  - Leveraging Drivers to Support Your Roles
  - Making Connections
  - Questions
7. Session 7: Managing Supply Chain Risks
  - Supply Chain Risks
  - Mitigation Strategies
8. Session 8: Tracking and Evaluating Supply Chain Data
  - Ratios and Formulas
  - Business Metrics
  - Inventory and Delivery Metrics
  - Sales Metrics
  - What is Benchmarking?
  - What Benchmarks Should Be Measured?
  - The SCOR Model
  - SCOR as a Pyramid
  - The Balanced Scorecard
  - Sample Balanced Scorecard
  - Supply Chain Management Dashboards
  - Creating a Supply Chain Dashboard System
  - Making Connections
  - Option One: Balanced Scorecard
  - Option Two: Dashboard
  - Examples
9. Session 9: Troubleshooting Supply Chain Problems
  - Signs of Trouble in Your Supply Chain
  - Supply Chain Best Practices
  - Best Practices from Industry Leaders
10. Session 10: Sharing Supply Chain Activities
  - Outsourcing, Insourcing, Offshoring, and Reshoring
  - Insourcing
  - Offshoring
  - Reshoring
  - Third- and Fourth-Party Logistic Providers
  - Fourth-Party Logistic Providers (4PL's)
  - Advantages of 3PL's and 4PL's
  - Disadvantages of 3PL's and 4PL's
  - Building Partnerships within Your Supply Chain
11. Session 11: Sustainable Supply Chain Strategies
  - What is Sustainability?
  - What Does Sustainability Mean in the Supply Chain?
  - The Benefits of Sustainability
  - Reducing the Impact on the Environment
  - Case Study
12. Session 12: Applying Lean Techniques to the Supply Chain
  - Lean 101
  - The Toyoda Precepts
  - The Toyota Production System House
  - Applying Lean to the Supply Chain
13. Session 13: The Future of Supply Chain Management
  - Top Trends
  - Making Connections
14. Session 14: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
15. Summary
16. Recommended Reading List
17. Post-Course Assessment

## Making Training Stick

### Course Overview

We have all participated in training courses or workshops. Some of these have been helpful and useful in our everyday lives and others have seemed redundant and a waste of time. How often have we cheered or grumbled at being asked to participate in a training day?

The good news is that all training can be useful and applicable if the trainer keeps some simple tips in mind when developing and applying training. We all learn differently, but there are some truths about learning that can be applicable to most groups and can be tweaked to fit any training session.

### Learning Objectives

- Familiarize yourself with strategies that can help learning to stick with the audience in an effective and meaningful way
- Know how to keep learners focused and motivated to absorb material
- Develop an effective training style, using appropriate training aids and techniques

### Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                     | Tying Learning to Work                               |
| Learning Objectives                               | Adults vs. Children                                  |
| Pre-Assignment                                    | 5. Session 5: What Method is the Stickiest?          |
| Pre-Course Assessment                             | Developing Training That is Sticky                   |
| 2. Session 2: Five Strategies for Stickiness!     | 6. Session 6: Following Up                           |
| Background Information                            | Seven Points for any Follow-Up Program               |
| The Five Strategies                               | Additional Points                                    |
| 3. Session 3: Designing a Program That Will Stick | The Buddy System and Delegating                      |
| Building Support for your Program                 | Follow-Up  |
| Think Ahead                                       | Follow-up or Folly?                                  |
| Reflect   | 7. Session 7: Strategies for Taking Training Further |
| Writing Learning Objectives                       | Mentorship Programs                                  |
| Why Display or Share Objectives?                  | Trainee Trains Others                                |
| How Do You Write Objectives?                      | 8. Session 8: A Personal Action Plan                 |
| Focusing on Results                               | Starting Point                                       |
| What is Measurable?                               | Where I Want to Go                                   |
| 4. Session 4: Teaching Tips and Tricks            | How I Will Get There                                 |
| The Four Steps in Experiential Learning           | 9. Summary   |
| Making Connections                                | 10. Recommended Reading List                         |
| The Principles of Adult Learning                  | 11. Post-Course Assessment                           |

# Making Your Business Better

## Course Overview

How a product or service is sold, and how a business is run, has changed. Customers want to know your company's values, selling is about relationships, and your workplace culture impacts productivity. Business relationships, a marketing strategy, and an understanding of the company's core values, guiding principles, strengths and opportunities is vital to growth. In this course, you will learn about these essentials, and how to combine that knowledge into your own Strategic Action Plan.

## Learning Objectives

- Understand positioning and the supply chain
- Recognize and work with elements of pricing
- Identify your 'business culture'
- Create and implement essential marketing tools
- Learn and practice techniques of selling and negotiation
- Create effective responses to requests for proposals (RFPs)
- Identify the essentials of project management and create a management plan
- Learn and implement elements to enhance workplace teamwork and productivity
- Create your own strategic plan

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview          | Seller and Contact Activity                   |
| Learning Objectives                      | Relationship Model of Selling                 |
| Pre-Assignment                           | Relationship Model Activity                   |
| Pre-Course Assessment                    | Elements of Negotiation                       |
| 2. Session Two: Positioning and Pricing  | Social and Emotional Intelligence             |
| Knowing What You Sell                    | Styles of Negotiation                         |
| Examining the Positioning                | Negotiating a Style Activity                  |
| Supply Chain Activity                    | 5. Session Five: Request for Proposals (RFPs) |
| Elements of Pricing                      | Understanding Proposals                       |
| 3. Session Three: Marketing              | Responding to an RFP                          |
| Your Business Culture                    | RFP Activity                                  |
| Elements of Culture Activity             | 6. Session Six: Project Management            |
| Understanding Your Customers             | Elements of Project Management                |
| Customer Values                          | Creating a Project Plan                       |
| Marketing Essentials                     | Work Structure Breakdown                      |
| Your USP Activity Part One               | Organizing the Tasks                          |
| Your Marketing Outline                   | Work Breakdown Structure Revisited            |
| 4. Session Four: Selling and Negotiating | 7. Session Seven: Team Building and           |
| Making the Sale                          | Productivity                                  |
|  | Individual Relationship Skills                |

- Healthy Workplace Culture
- Core Values
- Core Values Activity
- Building a Team
- Leadership Skills
- 8. Session Eight: Strategic Planning
  - A Strategic Plan
  - Ingredients of a Good Strategic Plan
  - Detailed Description Products/Services
  - USP Review
  - Core Values and Guiding Principles
- 9. Personal Action Plan
  - Core Values Revisited
  - Strengths and Opportunities
  - Guiding Principles Revisited
  - Assembling the Action Plan
  - Assemble the Strategic Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Course Summary
- 11. Recommended Reading List
- 12. Post Course Assessment

# Managing Across Cultures

## Course Overview

Our culture defines many aspects of how we think, feel, and act. It can be challenging for managers to bridge cultural differences and bring employees together into a functioning team. This course will give supervisors and managers easy-to-use techniques for communicating across cultures, building teams, promoting multiculturalism in the organization, and leveraging the global talent pool.

## Learning Objectives

- Define what culture is and how it shapes the workplace
- Identify how stereotypes shape our perception
- Develop useful cross-cultural attitudes
- Communicate effectively across cultures
- Effectively manage employees from different cultures
- Help teams overcome cross-cultural and virtual barriers
- Promote acceptance and awareness in your organization to help create a multicultural environment
- Leverage the global talent pool

## Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview           | Body Language Basics                        |
| Learning Objectives                     | Handling Miscommunication                   |
| Pre-Assignment                          | Case Study                                  |
| Questions                               | Questions                                   |
| Pre-Course Assessment                   |   |
| 2. Session 2: What Is Culture?          | 4. Session 4: Team Building Across Cultures |
| Defining Culture                        | The Five Stages of Team Development         |
| Culture in the Workplace                | Tips on Working with Virtual Teams          |
| In and Out Groups                       | 5. Session 5: Managing Across Cultures      |
| About Stereotypes                       | The Cornerstones of Diversity               |
| Some Common Phrases and the Stereotype  | Knowledge                                   |
| Behind Them                             | Understanding                               |
| Making Connections                      | Acceptance                                  |
| Globally Useful Attitudes               | Behavior                                    |
| Useful Organizational Attitudes         | How Far Do You Accommodate?                 |
| 3. Session 3: Communicating Effectively | Dealing with Culture-Based Conflicts        |
| High and Low Context Culture            | between Employees                           |
| The Contextual Spectrum                 | Questions                                   |
| Communication Differences Across        | Giving Culturally Sensitive Feedback        |
| Cultures                                | 6. Session 6: Building a Multicultural      |
| Communication Skills                    | Organization                                |
|   | Making Connections                          |

- Creating Inclusive Programs for New Employees
- 7. Session 7: Working with the Global Talent Pool
  - Understanding the Global Talent Pool
  - Dipping Into the Global Talent Pool
- 8. Session 8: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 9. Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment

# Managing Customer Service

## Course Overview

The need to lead, model, and promote the organizational values within a customer service environment is essential for business success. This course will provide you with opportunities to explore your responsibilities within your role as a leader (supervisor or manager) in a customer service environment.

## Learning Objectives

- Identify ways to establish links between excellence in customer service and your business practices and policies
- Develop the skills and practices that are essential elements of a customer service-focused manager
- Recognize what employees are looking for to be truly engaged
- Recognize who the customers are and what they are looking for
- Develop strategies for creating engaged employees and satisfied customers in whatever business units you manage

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview          | Ten Least Helpful Phrases                     |
| Learning Objectives                      | Measurement in Practice                       |
| Pre-Assignment                           | 3. Session Three: Understanding Leadership    |
| What Are You Focusing On?                | About Leadership                              |
| Discussion Questions                     | Understanding Your Comfort Zone               |
| Pre-Course Assessment                    | Our Comfort Level                             |
| 2. Session Two: Six Critical Elements    | Managing Performance                          |
| Critical Elements of Customer Service    | Servant Leadership                            |
| Element One: A Customer Service Focus    | The Heart of Leadership                       |
| The Three Beliefs                        | Onboarding and Orientation                    |
| Element Two: Procedures                  | 4. Session Four: Five Practices of Leadership |
| Drafting Standards                       | Challenging, Inspiring, and Enabling          |
| Element Three: Culture                   | Challenge the Process                         |
| Element Four: Problem-Solving            | Making Connections                            |
| Seven Steps to Customer Problem Solving  | Inspire a Shared Vision                       |
| Role Play                                | Enable Others to Act                          |
| Element Five: Measurement                | Making Connections                            |
| Element Six: Reinforcement               | Modeling and Heart                            |
| Developing and Maintaining Relationships | Committing to Recognition                     |
| Phrases for Customer Service Success     | Practices in Practice                         |
| Ten Most Helpful Phrases                 | Pre-Assignment Review                         |



5. Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
6. Course Summary
7. Recommended Reading List
8. Post-Course Assessment

# Managing Difficult Conversations

## Course Overview

We have so many interactions in the run of a day, it's reasonable to expect that some of them are going to be difficult. Whether these are conversations that you have in person, or you manage a virtual team and need to speak with someone in another city, there are things that you can do to make these conversations go smoothly. This course will give you the tools to manage difficult conversations and get the best results possible out of them.

## Learning Objectives

- Define frame of reference
- Establish a positive intent and a desired outcome
- Use good communication skills during a conversation
- Draft a script for a difficult conversation
- Use specific steps to carry out a difficult conversation
- Access additional resources as required
- Maintain safety in a conversation

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                      | A Story from Mark Twain                             |
| Learning Objectives                                | Active Listening                                    |
| Pre-Assignment                                     | Responding to Feelings                              |
| Conversation #1                                    | Reading Cues  |
| Conversation #2                                    | Demonstration Cues                                  |
| Pre-Course Assessment                              | Tips for Becoming a Better Listener                 |
| 2. Session 2: Choosing to Have the Conversation    | Asking Questions                                    |
| Considering the Consequences                       | Making Connections                                  |
| Establishing Your Frame of Reference               | Probing Techniques                                  |
| Tips and Tricks                                    | The Probing Funnel                                  |
| Establishing Positive Intent                       | 4. Session 4: Choosing the Time and Place           |
| Making Connections                                 | Choosing the Time and Place                         |
| Accepting People for People                        | 5. Session 5: Framework for Difficult Conversations |
| Planning What You Want                             | What's Your Purpose?                                |
| Things to Ask Yourself                             | Making Connections                                  |
| A Note on Fairness                                 | Steps for a Difficult Conversation                  |
| 3. Session 3: Toolkit for Successful Conversations | Conversation Template                               |
| Managing Your Body Language                        | 6. Session 6: Staying Safe                          |
| Making Connections                                 | Introduction  |
| Speaking Persuasively                              | Mutual Respect                                      |
|  | Common Ground                                       |
|  | Staying in Control                                  |

- When to Walk Away
- When Things Don't Work
- 7. Session 7: Testing the Waters
- Making Connections
- 8. Session 8: A Personal Action Plan

- Starting Point
- Where I Want to Go
- How I Will Get There
- 9. Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment

# Managing Pressure and Maintaining Balance

## Course Overview

When things are extremely busy at work and you have your hands full with many tasks and dealing with difficult people, having skills you can draw on are essential for peace of mind and growth. This course will help participants understand the causes and costs of workplace pressure, the benefits of creating balance, and how to identify pressure points. They will also learn how to apply emotional intelligence, increase optimism and resilience, and develop strategies for getting ahead.

## Learning Objectives

- Apply a direct understanding of pressure points and their costs and payoffs
- Speak in terms related to emotional intelligence, optimism, and resilience
- Create a personalized toolkit for managing stressors and anger
- Work on priorities and achieve defined goals

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Under Pressure!
  - Understanding Pressure
  - Costs to the Employee
  - Costs to the Employer
  - Costs to Society
  - Benefits of Creating Balance
  - Pre-Assignment Review
  - What the Statements Mean
3. Session 3: Getting to the Heart of the Matter
  - Identifying Your Pressure Points
  - What Are Your Pressure Points?
  - Creating an Action Plan
  - Pressure Point One
  - Pressure Point Two
  - Pressure Point Three
  - Getting Prepared
  - SPIRIT
  - Considering Our Resources
  - Asking for Help
4. Session 4: Emotional Intelligence
  - Finding the Right Helper
  - Making Connections
  - The Seven Human Emotions
  - What Do Emotions Tell Us?
  - Summary
  - The Emotional Map
  - Plutchik's Wheel of Emotions
  - Validating Emotions in Others
  - Technique Two: SOLER
  - Communication Tips and Tricks
  - Words of Wisdom
  - What is Optimism?
  - Making the Shift
  - What is Pessimism?
  - Words of Wisdom
  - Resilience
5. Session 5: Coping Toolkit
  - Building the Stress Management Kit
  - What is Anger?
  - Controlling Our Response
  - The Five Dimensions of Anger
  - Making Connections
  - Expressing Yourself

- I Messages
- The Assertive Formula
- Making Connections
- 6. Session 6: Getting Organized
  - Why Prioritize?
  - Identifying the Must-Do List
  - Getting Help
  - Doing It!
- 7. Session 7: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 8. Summary
- 9. Recommended Reading List
- 10. Post-Course Assessment

# Managing the Virtual Workplace

## Course Overview

Whether you have already established a virtual workplace or you are considering doing this, Managing the Virtual Workplace will provide guidance and strategies for success.

## Learning Objectives

- Create a virtual workplace strategy
- Develop, implement, and maintain telecommuting programs
- Build a virtual team and lead them to success
- Plan and lead virtual meetings
- Use technology to support your virtual workplace
- Overcome cultural barriers when leading virtual teams
- Develop your virtual leadership skills

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Defining the Virtual Workplace
  - Definitions
  - Advantages for Businesses
  - Advantages for Employees
  - Challenges
  - Activity
  - State of Remote Report 2019
3. Session Three: Creating Virtual Workplace Programs
  - Building a Virtual Workplace Strategy
  - Pre-Assignment Review
  - Characteristics of Great Virtual Teams
  - Setting up Employees for Telework
  - Staying on Top of Projects
  - Keeping in Touch
  - Making Connections
4. Session Four: Technology
  - Virtual Workplace Tools
  - Choosing the Right Tools
  - A Note about Internet and Data Access
  - Making it Work
5. Session Five: Building Virtual Teams
  - The Stages of Team Development
  - Stage One: Forming
  - Stage Two: Storming
  - Stage Three: Norming
  - Stage Four: Performing
  - Stage Five: Adjourning
  - Making Connections
  - Choosing the Virtual Team
  - Making the Best of an Assigned Team
  - Strategies for Success
6. Session Six: Virtual Leadership Strategies
  - Making Connections
7. Session Seven: Leading Virtual Team
  - Meetings
  - Scheduling and Conducting Team Meetings
  - Things to Consider
  - Setting Expectations
  - Choosing the Time and Place
  - Conducting the Meeting
  - Following Up
  - Test Driving
8. Session Eight: Working with Cross-Cultural Teams
  - Bridging Cultural Gaps

9. Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
10. Course Summary
11. Recommended Reading List
12. Post-Course Assessment

## Marketing and Sales

### Course Overview

Marketing goals and objectives for business can be supported by even a small budget, with some focused awareness and creativity. This one-day workshop will demonstrate how organizations can gain maximum exposure at minimum cost. Participants will learn effective low-cost and no-cost strategies to improve sales, develop a brand, and build the bottom line of a company, regardless of size.

### Learning Objectives

- Define and understand basic marketing concepts.
- Use low-cost publicity for name and brand recognition.
- Develop a marketing plan and campaign.
- Use time rather than money to market a company effectively.
- Perform a SWOT analysis for continuous improvement

### Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Pre-Assignment Review
  - Review and Reflect
3. Session Three: Defining Marketing
  - The Most Effective Marketing
4. Session Four: Recognizing Trends
  - Changing Trends
5. Session Five: Doing Market Research
  - The Need for Research
6. Session Six: Strategies for Success
  - Top Ten
  - Identifying Opportunities (Part One)
  - Identifying Opportunities (Part Two)
  - Making Connections
7. Session Seven: Mission Statements
  - Developing the Mission Statement
8. Session Eight: Brochures
  - Eye-Catching Brochures
9. Session Nine: Trade Shows
  - Why Attend a Trade Show?
  - Preparing for a Trade Show
10. Session Ten: Developing a Marketing Plan
  - The P's of Marketing
  - SWOT Analysis
  - A Simple Marketing Plan for Small Budgets
11. Session Eleven: Increasing Business
  - Ways to Increase Business
12. Session Twelve: Saying No to New Business
  - When to Say No
13. Session Thirteen: Advertising Myths
  - Debunking Myths
  - Creating Desire
14. Session Fourteen: Networking Tips
  - Networking
15. Session Fifteen: Reflection
16. A Personal Action Plan
17. Summary
18. Recommended Reading List
19. Post-Course Assessment



# Marketing for Small Businesses

## Course Overview

Marketing is about getting your business known and building your position within the marketplace. Small businesses don't always have a big budget for marketing, so they have to do things a little differently than big business in order to grow their presence, increase results, and meet business goals. This course will help small business owners and managers develop their marketing message, create a marketing plan, and apply the right strategies.

## Learning Objectives

- Describe the essential elements of a marketing plan, no matter the size of the business
- Apply tools and strategy to create a marketing plan that supports the growth of your small business
- Use six steps to create, implement, and review a marketing plan
- Leverage the best of Internet and social media marketing

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview              | Body Language Says It All                  |
| Learning Objectives                        | Influence and Persuasion                   |
| Pre-Assignment                             | Predictability                             |
| Pre-Course Assessment                      | Reciprocation                              |
| 2. Session 2: Marketing for Small Business | Consistency and Commitment                 |
| Defining Marketing in the Small Business   | Social Evidence                            |
| Context                                    | Authority                                  |
| Marketing and Sales                        | Liking                                     |
| The Best Marketing                         | Scarcity                                   |
| Glossary of Terms                          | Self-Interest                              |
| Standing Out from the Crowd                | Testing and Revising                       |
| Pre-Assignment Review                      | 4. Session 4: The Marketing Cycle in Small |
| 3. Session 3: Elements of a Successful     | Business                                   |
| Marketing Message                          | Marketing Essentials                       |
| Your USP                                   | Stage One: Consumer and Market Analysis    |
| Making Connections                         | What Do They Need?                         |
| Building the Relationship                  | Who is Buying and Who is Using Our         |
| Find Common Ground                         | Product?                                   |
| Use Direct Language and Deliver a Message  | What Is the Buying Process?                |
| That is Clear, Calm, and Direct            | Sample Buying Process                      |
| Factual Descriptions and Relevant Details  | How Can I Leverage Segmentation?           |
| are More Likely To Be Heard                | Stage Two: Analyzing the Competition and   |
| Use Repetition Respectfully to Keep Things | Yourself                                   |
| on Track                                   | SWOT Analysis                              |

- Next Steps
- Stage Three: Analyzing Distribution Channels
- Sample Configuration
- Making Connections
- Stage Four: Creating a Marketing Plan
- Place
- Price
- Promotion
- Packaging
- Bringing it All Together
- Key Considerations
- Remember!
- Making Connections
- 5. Session 5: Identifying Marketing Strategies
- Key Marketing Strategies for Small Businesses
- Getting the Most Bang for Your Buck
- Key Strategies
- Making Connections
- Top Ten Strategies for Success
- Identifying the Strategies
- Identifying Opportunities
- A Simple Marketing Plan for Small Budgets
- 6. Session 6: Implementing Your Plan
- What is a Marketing Budget?
- Crashing Your Own Budget
- Four Rules for Establishing Your Budget
- Managing Your Budget
- Know Your Accruals
- Stage Five: Implementing and Evaluating
- Making Connections
- Stage Six: Reviewing and Revising
- Adapting and Evolving
- Case Study
- 7. Session 7: Internet Marketing Basics
- What It Looks Like
- Sample Site Structure
- Making Connections
- Popular Strategies
- Web Design and Development
- Affiliate Programs
- E-mail Marketing
- Using Social Media
- Search Engine Optimization (SEO)
- Sharing Messages
- Building Community
- Considering Videos
- Be Remarkable!
- E-mail Marketing
- A Cautionary Note
- Distribution Services
- Keep it Rich
- What is SEO?
- Spiders, Crawlers, Bots (or Robots)
- Natural and Organic Searches
- Paid Searches
- URL Basics
- How It Works
- Pinging
- Leveraging Social Media
- Stretch
- Build a Community
- Watch Out for Social Media Experts
- Be There
- Find Your Customers
- Be a Person
- Follow Others
- 8. Session 8: A Personal Action Plan
- Starting Point
- Where I Want to Go
- How I Will Get There
- 9. Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment

# Mastering Adult Learning Methods

## Course Overview

Mastering the craft of adult education requires instructors to use methods that allow adult learners to self-actualize, gain experience, and problem-solve. Understanding the best adult education methods can inspire instructors to develop learning that leverages knowledge and skills that the learners already possess and create an energized environment for adult learning.

## Learning Objectives

- Compare and contrast the teaching of children (pedagogy) and adult learning (andragogy).
- Apply best practices in adult education within your own classroom.
- Explain the importance of reflection in adult learning.
- Develop and use self-reflection and group reflection within classroom activities to enhance learning.
- Explain the importance of experiential, self-directed, project based, and action learning in adult education.
- Develop and use experiential learning, self-directed, project based, and action learning classroom activities to enhance learning.
- Make use of reflective practice to continually improve one's education craft.

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview<br>Learning Objectives<br>Pre-Assignment<br>Pre-Course Assessment  | 4. Session Four: Learning Methods —<br>Experiential Learning<br>Experiential Learning<br>Experiential Learning Exercise<br>Reflection and Discussion                        |
| 2. Session Two: Learning Theory — Andragogy<br>Teaching Adults<br>Ways of Teaching Children Versus Adults<br>Best Practices of Adult Learning<br>Teacher/Instructor/Facilitator/Mentor   | 5. Session Five: Learning Methods —<br>Self-Directed Learning<br>Self-Directed Learning<br>Extra Information<br>Self-Directed Learning Exercise<br>Apple Park<br>Reflection |
| 3. Session Three: Learning Methods —<br>Reflection<br>Reflection<br>Self-Reflection<br>ICE Model<br>Gibbs Cycle of Reflective Thought<br>Self-Reflection Exercise: N'Derial III<br>N'Derial III Self-Reflection Exercise<br>Group Reflection | 6. Session Six: Learning Methods —<br>Project-Based Learning<br>Project-Based Learning<br>Newsletter Project<br>Reflection  |

- 7. Session Seven: Learning Methods – Action Learning
  - What is Action Learning?
  - Action Learning in the Classroom
  - Action Learning Exercise
  - Reflection
- 8. Session Eight: Practice
  - Capstone Exercise
- 9. Session Nine: Reflective Practice
  - Reflective Practice
  - Reflective Diary
  - Pre-Assignment Exercise
- 10. Personal Action Plan
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Mastering the Interview

## Course Overview

The interview is a key element of the job search process. As with any skill, interviewing improves with preparation and practice. In this workshop, participants will explore how to prepare for an interview and become familiar with the types of questions to expect as well as the questions they should think about asking. They will learn how to prepare for second interviews and testing as well as how to follow up on their interview sessions.

## Learning Objectives

- Understand the different types of interview questions and how to prepare to answer them
- Apply effective ways to prepare for an interview, including how to present yourself professionally
- Express yourself effectively
- Know how to ask for feedback following an interview

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                | Best Intentions                              |
| Learning Objectives                          | Making Connections                           |
| Pre-Assignment                               | 8. Session Eight: After the Interview        |
| Pre-Course Assessment                        | What to Expect After the Interview           |
| 2. Session Two: Understanding the Interview  | Being Told "No, Thanks"                      |
| Planning for the Interview                   | 9. Session Nine: Putting More Ideas into     |
| The Informational Interview                  | Practice                                     |
| 3. Session Three: Types of Questions         | Interview                                    |
| Understanding the Types                      | 10. Session Ten: Receiving the Offer         |
| Preparing Interview Questions                | Job Offers                                   |
| 4. Session Four: Preparing for the Interview | Resignations                                 |
| Strategies for handling Questions            | 11. Session Eleven: Negotiating Compensation |
| General Strategies                           | Negotiating Tips and Tricks                  |
| 5. Session Five: Putting Ideas into Practice | Keeping Perspective                          |
| Interview                                    | 12. Personal Action Plan                     |
| 6. Session Six: Relaxing for the Interview   | 13. Course Summary                           |
| Warm-ups                                     | 14. Recommended Reading List                 |
| 7. Session Seven: Common Problems and        | 15. Post-Course Assessment                   |
| Solutions                                    |  |

## Measuring Training Results

### Course Overview

Think back to the last training program that you conducted or attended. What did you learn from that course? How did you (or your students) apply the new skills back in the workplace? Can you tie those results directly back to the training program?

### Learning Objectives

- Identify the most effective methods of training evaluation
- Describe the steps required in the essential elements of measuring training results
- Tie training measurements back to the original training objectives
- Explore the most effective methods to report training results, including a return on investment

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                             | Session Five: The Return on Investment             |
| Learning Objectives   | Clarifying Expectations                            |
| Pre-Assignment  | What Training Does                                 |
| Making Connections  | Getting The Evaluation Right                       |
| Pre-Course Assessment                                       | Making Connections                                 |
| 2. Session Two: Setting the Framework                       | Cost-Benefit Analysis                              |
| Identifying What You Will Measure                           | The Elements Of The CBA                            |
| Isolating   | Preparing for the Cost-Benefit Analysis            |
| Consulting  | Cost-Benefit Analysis Worksheet                    |
| Evaluating  | Results Expected                                   |
| Determining How You Are Going To Measure It                 | Approvals Obtained                                 |
| Designing An Evaluation Strategy To Fit Your Training Needs | Calculating The Return On Investment               |
| Making Connections  | 5. Session Six: Presenting Training Results        |
| 3. Session Three: Pre-Assignment Review                     | Getting Ready                                      |
| Making Connections  | Preparing For The Meeting                          |
| 4. Session Four: Kirkpatric's Evaluation Model              | Seven Ingredients for Effective Meeting Management |
| Methods Of Evaluation                                       | Ground Control                                     |
| Points To Remember  | Practice Never Hurts                               |
| Creative Evaluation Strategies                              | Making Connections                                 |
| Evaluation Tips   | 6. Personal Action Plan                            |
| Sample Feedback Form  | Starting Point                                     |
| Evaluating The Program                                      | Where I Want to Go                                 |
| Getting Results By Testing The Program                      | How I Will Get There                               |
| Performance Indicator Matrix                                | 7. Course Summary                                  |
| Program Assessment Report Card                              | 8. Recommended Reading List                        |
|   | 9. Post-Course Assessment                          |

# Meeting Management: The Art of Making Meetings Work

## Course Overview

Meetings come in all shapes and sizes, from the convention to a quick huddle in an office hallway. This course will be concerned with small working meetings; with groups that have a job to do requiring the energy, commitment, and talents of those who participate. Members of such a group want to get some kind of result out of their time together: solving problems, brainstorming, or simply sharing information. At its best, such a group knows what it is about, and knows and utilizes the strengths of individual members.

## Learning Objectives

- Understand the value of meetings as a management tool
- Recognize the critical planning step that makes meeting time more effective
- Identify process tools that can help create an open and safe forum for discussion
- Develop and practice techniques for handling counterproductive behaviors

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                    | Sample Agenda                                      |
| Learning Objectives                              | Put the items below in order to develop an agenda. |
| Pre-Assignment                                   |  |
| Pre-Course Assessment                            | 7. Session 7: Setting the Place                    |
| 2. Session 2: The Basics for Effective Meetings  | Factors to Consider                                |
| Key Characteristics                              | Physical Setup                                     |
| Meeting Participants                             | Advance Notice                                     |
| Types of Meetings                                | 8. Session 8: Leading a Meeting                    |
| Summary  | Functions of a Leader                              |
| 3. Session 3: The Best and the Worst of Meetings | Key Tasks  |
| Making Connections                               | Making Connections                                 |
| 4. Session 4: Holding Productive Meetings        | Your Role as Group Leader                          |
| Keys to Productive Meetings                      | 9. Session 9: Process and Content                  |
| Barriers to Productive Meetings                  | Defining Process and Content                       |
| Case Study                                       | Making Connections                                 |
| 5. Session 5: Preparing for Meetings             | Rules of Work                                      |
| Checklist for Success                            | Meeting Styles                                     |
| Timing Your Meeting                              | How Much Time?                                     |
| Deciding Who Should Attend                       | Arrange an Open House                              |
| 6. Session 6: Agendas                            | Alternate Leaders                                  |
| Setting an Agenda                                | Stand Up   |
| Setting up the Agenda                            | Leverage Technology                                |
| What are Minutes?                                | Use Tools  |
| A Leader's Role                                  | Facilitation Skills                                |
|  | Key Behaviors for a Facilitator                    |

10. Session 10: How to Control a Meeting  
Dealing with Difficult People  
Mix and Match  
The Kidder  
Exhausted and Droopy  
Not Into It!  
Poor Follow-Through on Assignments  
Failure of Participants to Arrive/Return  
from Breaks on Time  
Whisperers

11. Session 11: A Plan for Success  
Making Connections  
12. Session 12: A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
13. Summary  
14. Recommended Reading List  
15. Post-Course Assessment



# Microorganisms

## Course Overview

This course reviews different kinds of microorganisms, including bacteria, viruses, parasites, fungi, and biological toxins.

## Learning Objectives

- Understand what pathogens are and why they must be prevented from contaminating food
- How to prevent foodborne illness from pathogens
- Identify the “Big Six” pathogens
- Recognize symptoms and sources of common pathogens
- Understand how bacteria, viruses, and parasites reproduce and spread
- Recognize common bacteria, viruses, parasites, fungi, and toxins

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: Pathogens
  - What Are Pathogens?
  - How Contamination Occurs
  - Foodborne Illness Symptoms
  - The Big Six
3. Session Three: Bacteria
  - What Are Bacteria?
  - How Do Bacteria Grow?
  - Controlling FAT TOM Factors
  - Common TCS Foods
  - Bacterial Growth Phases
  - How Do Bacteria Grow?
  - Common Foodborne Bacteria
    - Bacillus cereus
    - Listeria monocytogenes
    - Shiga toxin-producing E. coli (STEC)
    - Campylobacter jejuni
    - Clostridium perfringens
    - Clostridium botulinum
    - Nontyphoid Salmonella
    - Salmonella Typhi
    - Shigella species
4. Session Four: Viruses, Parasites, Fungi, and Toxins
  - What Are Viruses?
  - How do Viruses Grow?
  - Prevention Measures
  - Common Foodborne Viruses
    - Hepatitis A
    - Norovirus
    - Norovirus Outbreak Case Study
  - What Are Parasites?
  - Prevention Measures
  - Common Foodborne Parasites
    - Cryptosporidium parvum
    - Cyclospora cayentanesis
    - Giardia lamblia
    - Toxoplasma gondii
  - Parasite Risk Assessment
  - What Are Fungi?
  - What Are SeaFood Toxins?
  - Common Foodborne Seafood Toxins
    - Ciguatoxin
    - Saxitoxin
    - Brevetoxin

Domoic Acid

What Are Mushrooms and Plant Toxins?

Putting Pathogen Knowledge in Practice

5. Personal Action Plan

6. Course Summary

7. Recommended Reading List

8. Post-Course Assessment

## Mobbing in the Workplace

### Course Overview

Could mobbing take place in your workplace? There are steps you can take to ensure your organization is mobbing-resistant.

### Learning Objectives

- Identify mobbing and how it differs from individual bullying
- Know why and how it occurs
- Know how it impacts the person targeted and the organization
- Know what actions to take if you are being mobbed
- Know how to avoid targeting someone
- Know what action to take as an organization to stop mobbing before it starts

### Course Outline

- |  |   |
|--|---|
| 9. Session One: Course Overview                  | As a Co-worker                                    |
| Learning Objectives                              | Role Play Activity                                |
| Pre-Assignment                                   | 14. Session Six: Watch For It                     |
| Pre-Course Assessment                            | What Can Leadership Do?                           |
| 10. Session Two: What is Mobbing?                | Halting Mobbing                                   |
| What and Why?                                    | Workplace Health Check                            |
| Bullying Incidents                               | A Reflection on Your Workplace                    |
| A Mobbing Scenario                               | 15. Session Seven: Make Your Own Policy           |
| Stats  | Creating Anti-Mobbing Policies                    |
| More Stats                                       | Writing the Policy                                |
| Mobbing Reflection                               | Educating Staff                                   |
| 11. Session Three: Why Do We Turn on Each Other? | Implementing and Enforcing Anti-Bullying Policies |
| Hierarchies                                      | Pre-Assignment Review                             |
| Tendencies                                       | Lessons for the Workplace                         |
| Influences                                       | 16. Personal Action Plan                          |
| Toxic Workplaces                                 | Starting Point                                    |
| 12. Session Four: Mobbing Hurts                  | Where I Want to Go                                |
| How Does Mobbing Hurt?                           | How I Will Get There                              |
| Reflection                                       | 17. Course Summary                                |
| 13. Session Five: How to Deal with Mobbing       | 18. Recommended Reading List                      |
| As the Victim                                    | 19. Post-Course Assessment                        |
| Stress Relief                                    |   |

# Motivation Training: Motivating Your Workforce

## Course Overview

It's no secret that employees who feel they are valued and recognized for the work they do are more motivated, responsible, and productive. This course will help supervisors and managers create a more dynamic, loyal, and energized workplace. It is designed specifically to help busy managers and supervisors understand what employees want, and to give them a starting point for creating champions.

## Learning Objectives

- Identify what motivation is
- Describe common motivational theories and how to apply them
- Learn when to use different kinds of motivators
- Create a motivational climate
- Design a motivating job

## Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview            | What Do We Value In Work?                     |
| Learning Objectives                      | Identifying Your Values                       |
| Pre-Assignment                           | Narrowing Down Your Values                    |
| Pre-Course Assessment                    | Bringing It All Together                      |
| 2. Session 2: What is Motivation?        | 7. Session 7: Creating a Motivational Climate |
| Defining Motivation                      | Behavioral (Reinforcement) Theory             |
| 3. Session 3: Supervising and Motivation | Reinforcement Theory                          |
| Why is Motivation Important?             | The Big Question                              |
| Identifying Motivators                   | Expectancy Theory                             |
| Making Connections                       | McClelland's Needs Theory                     |
| What Do You Think?                       | 8. Session 8: Applying Your Skills            |
| 4. Session 4: Motivational Theories      | Situational Analysis                          |
| A Look at Theory                         | Case Studies                                  |
| Herzberg's Motivational versus           | 9. Session 9: Designing Motivating Jobs       |
| Maintenance (or Hygiene) Factors         | Designing My Job                              |
| Supervisor's versus Higher Management's  | Five Key Characteristics                      |
| Role                                     | Techniques for Job Design or Redesign         |
| Motivation Theories                      | A Motivational Checklist                      |
| Pre-Assignment Review                    | 10. Session 10: A Personal Action Plan        |
| 5. Session 5: Setting Goals              | Starting Point                                |
| Setting Goals with SPIRIT                | Where I Want to Go                            |
| Goal Setting and Goal Getting!           | How I Will Get There                          |
| 6. Session 6: The Role of Values         | 11. Summary                                   |
| Developing Targets                       | 12. Recommended Reading List                  |
| Making Connections                       | 13. Post-Course Assessment                    |

# Negotiating for Results

## Course Overview

Negotiating is about resolving differences. People who can master the process of negotiation find they can save time and money, develop a higher degree of satisfaction with outcomes at home and at work, and earn greater respect in their communities when they understand how to negotiate well.

Negotiating is a fundamental fact of life. Whether you are working on a project or fulfilling support duties, this course will provide you with a basic comfort level to negotiate in any situation. This course includes techniques to promote effective communication and gives you techniques for turning face-to-face confrontation into side-by-side problem solving.

## Learning Objectives

- Understand how often we all negotiate and the benefits of good negotiation skills
- Recognize the importance of preparing for the negotiation process, regardless of the circumstances
- Identify the various negotiation styles and their advantages and disadvantages
- Develop strategies for dealing with tough or unfair tactics
- Gain skill in developing alternatives and recognizing options
- Understand basic negotiation principles, including BATNA, WATNA, WAP, and the ZOPA

## Course Outline

- |                                      |   |
|--------------------------------------|---|
| 1. Session 1: Course Overview        | Commitment and Closing                  |
| Learning Objectives                  | 3. Session 3: The Successful Negotiator |
| Pre-Assignment                       | Key Attributes                          |
| Pre-Course Assessment                | Pre-Assignment Review                   |
| 2. Session 2: What is Negotiation?   | Communication Skills                    |
| Defining Negotiation                 | Body Language                           |
| Types of Negotiation                 | Problem Solving                         |
| Inductive/Deductive/Mixed            | Creative Thinking                       |
| Soft/Hard/Principled                 | Building Enthusiasm and Confidence      |
| Non-Negotiable Positions vs. Options | 4. Session 4: Preparing for Negotiation |
| Positional Bargaining                | Getting Started                         |
| Principled Negotiating               | Managing Your Fear                      |
| Principled Negotiation               | Growing and Improving                   |
| Three Styles                         | Personal Preparation                    |
| Phases of Negotiation                | Your Personal Hot Buttons               |
| Preparation                          | Making Connections                      |
| Exchanging Information               | Researching Your Side                   |
| Bargaining                           | Case Study                              |

- Discussion Questions
- Researching the Other Side
- 5. Session 5: The Nuts and Bolts
  - Preparing Documentation
  - Setting the Time and Place
  - Choosing the Time
  - Other Factors
  - Case Study
- 6. Session 6: Making the Right Impression
  - First Impressions
  - The Handshake
  - Other Points
  - Dress for Success
  - The Skill of Making Small Talk
  - Small Talk Can Suit You!
  - What Works?
  - What Doesn't Work?
- 7. Session 7: Getting Off to a Good Start
  - Common Ground
  - Ground Rules
- 8. Session 8: Exchanging Information
  - Getting Started
  - Making Connections
- 9. Session 9: The Bargaining Stage
  - Six Techniques for Success
  - Equalization
  - Building a Case
  - "It's Too Bad"
  - Wear Them Down
  - Mix It Up
  - Bridge the Gap
  - Case Study
- 10. Session 10: Reaching Mutual Gain
  - Getting Rid of Obstacles
  - Considering the Options
  - Key Obstacles
  - Premature Judgment
- Searching For the Single Outcome
- The Fixed Pie
- Solving Their Problem is Their Problem
- Overcoming the Obstacles
- 11. Session 11: Moving Beyond "No"
  - Getting Past No
  - Breaking the Impasse
  - Getting to Yes
- 12. Session 12: Dealing with Negative Emotions
  - Defusing the Bomb
  - Stonewalling
  - Attacking
  - Dishonesty
  - Choosing Your Response
  - Tips for Defusing Negative People
- 13. Session 13: Moving from Bargaining to Closing
  - Knowing When to Close
  - A Three-Step Process
  - Things to Avoid
  - Formal vs. Informal Agreements
- 14. Session 14: Solution Types
  - Possible Outcomes
  - Building a Sustainable Agreement
  - Getting Everyone's Perspective
  - Reviewing the Information
  - Outlining the Options
  - Getting Consensus
- 15. Session 15: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 16. Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment

# Networking for Success

## Course Overview

Business networking is an effective and efficient way for business people to connect, develop meaningful relationships, and grow their businesses. These achievements don't come through a direct sales approach, however. They come from being interested in helping others, in listening, and in purposefully meeting and introducing people to one another. In this course, you'll learn the essential ingredients for business networking, including in-person, people-centered connections and online spaces such as LinkedIn.

## Learning Objectives

- Introduce yourself in a meaningful, memorable way, even if you've never worked on an elevator pitch before
- Be goal focused about networking so that you make the most of events you attend
- Apply the concept of give first and be helpful as part of a system of reciprocity
- Use strategy and systems in order to network effectively
- Leverage the availability and usefulness of the Internet, including LinkedIn and Twitter

## Course Outline

- |  |                                    |
|--|------------------------------------|
| 1. Session 1: Course Overview                  | Associated or Dissociated          |
| Learning Objectives                            | Towards or Away From               |
| Pre-Assignment                                 | Match/Mismatch                     |
| Pre-Course Assessment                          | Summary                            |
| 2. Session 2: Assessing Your Networking Skills | Be a Conduit                       |
| Networking Dynamics                            | Getting Your Message Out           |
| Are You Committed?                             | Be a Conduit                       |
| 3. Session 3: Identifying Opportunities and    | Pre-Assignment Review              |
| Customizing Your Approach                      | Remembering Names                  |
| Creating Opportunities                         | Repeat Their Name                  |
| Preparing to Network                           | Write It Down                      |
| Key Questions                                  | Spell It Out                       |
| Things to Consider                             | Word Play                          |
| Customizing Your Approach                      | Confess!                           |
| Targets and Goals                              | Making Connections                 |
| Unplanned Networking                           | 5. Session 5: Your Memorable Intro |
| Do's and Don'ts                                | The Basics                         |
| 4. Session 4: Creating a Positive First        | A Basic Format                     |
| Impression                                     | Sample Introductions               |
| Body Language                                  | Memorability Factor                |
| Interpreting Body Language                     | Worksheet – Example Two            |

6. Session 6: Starting the Conversation
  - How To Get Started
  - Listening
  - The Basics of Small Talk
  - Seven Steps to Mastering Small Talk
  - Conversation Stimulation
  - Keeping the Purpose in Mind
  - The Complicated Parts
  - Growing Skills
  - Joining and Starting Conversations
  - Getting Comfortable
  - Plan Your Own Future
  - Making Connections
7. Session 7: The Handshake
  - The Importance of a Handshake
  - Five Factors
  - Tips for Success
8. Session 8: Business Cards
  - Business Card Etiquette
  - Tips and Tricks
  - Electronic Card Sharing
  - QR Codes
  - In a Pinch
9. Session 9: Handling Tough Situations
  - The Things We Say
  - Making Connections
  - Six Strategies for Success
  - What Others Say
  - The Right Perspective
  - Introverts and Extroverts
  - Extroverts and Introverts
  - Your Comfort Level
  - Making Connections
10. Session 10: Following Up
  - Introduction
  - Following Up
  - Extending the Invitation
  - Handling Rejection
  - Case Study
  - Making It Personal
- Choosing to Abstain
- Opting In
11. Session 11: Organizing Your Network
  - Contact Management Systems
  - Choosing a System
  - About Integrated Systems
  - Mastering Networking
  - Skills to Develop
  - Keeping a Journal
  - Sample Journal Entry
  - Setting Goals
  - Consistency
  - Independent Growth
12. Session 12: Leveraging the Internet
  - Using LinkedIn
  - LinkedIn Status Updates
  - Getting Connected
  - Second and Third Degree Connections
  - Using Groups
  - Using Twitter
  - Getting Started with Twitter
  - Hashtags
  - Re-Tweets
  - Your Name
  - Strong Connections
  - Using Lists on Twitter
  - Using Lists
  - Using Facebook
  - First Steps
  - Next Steps
  - Due Diligence
  - Now You Can!
  - Know Your Tools
13. Session 13: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
14. Summary
15. Recommended Reading List
16. Post-Course Assessment



## NLP Tools for Real Life

### Course Overview

Neuro linguistic programming (NLP for short) is all about bringing your unconscious thoughts to the surface, so that you can have real choice over how you interact with and respond to the world.

Once you have a grasp on NLP's basic principles, you might be interested in learning about some tools that can help you do more with NLP. This course will give you some hands-on experience with important NLP techniques, including anchoring, establishing congruency, developing rapport, creating outcomes, interpreting and presenting information efficiently, and even some self-hypnosis techniques.

### Learning Objectives

- Develop a deeper rapport with others
- Use anchoring to create a desired state of mind
- Become congruent with your inner self
- Understand and apply basic self-hypnosis techniques
- Create goals with momentum using NLP's outcome framework
- Present, interpret, and analyze information using the 7±2 rule and the chunking technique

### Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                 | Setting Some Personal Outcomes             |
| Learning Objectives                           | 5. Session 5: Creating a Desired State     |
| Pre-Assignment                                | Basic Anchoring Techniques                 |
| Pre-Course Assessment                         | Steps for Creating a Basic Anchor          |
| 2. Session 2: Developing Rapport              | Collapsing Anchors                         |
| Defining Rapport                              | Chaining Anchors                           |
| Matching and Mirroring                        | Making Connections                         |
| Body Language                                 | 6. Session 6: Chunking Information         |
| Voice Characteristics                         | The 7±2 Rule and the Ladder of Abstraction |
| Sensory Systems                               | The Ladder of Abstraction                  |
| Pacing  | Chunking                                   |
| Leading                                       | 7. Session 7: A Personal Action Plan       |
| 3. Session 3: Getting in Tune with Yourself   | Starting Point                             |
| Establishing an Inner Map                     | Where I Want to Go                         |
| What Does Congruency Mean for Me?             | How I Will Get There                       |
| Achieving Congruency                          | 8. Summary                                 |
| Deep Breathing                                | 9. Recommended Reading List                |
| 4. Session 4: Creating Comprehensive Outcomes | 10. Post-Course Assessment                 |
| The Elements of a Well-Formed Outcome         |  |

# Onboarding: The Essential Rules for a Successful Onboarding Program

## Course Overview

Did you know that most employees decide to leave a job within their first 18 months with an organization? When an employee does leave, it usually costs about three times their salary to replace them.

You can greatly increase the likelihood that a new employee will stay with you by implementing a well-designed onboarding program that will guide the employee through their first months with the company. This course will explore the benefits of onboarding, show you how to design an onboarding framework, give you ways to customize the program for different audiences (including managers and executives), and demonstrate how to measure results from the program.

## Learning Objectives

- Define onboarding and describe how it is different from orientation
- Identify the business benefits of onboarding
- List the factors that contribute to a successful onboarding program
- Build a team to create an onboarding program
- Prepare a vision statement and goals for an onboarding program
- Design a framework for an onboarding program that includes program setup, various types of training, games, progress tracking, and follow-up
- Customize your onboarding framework
- Identify which metrics you should track to evaluate program results
- Create a branded, unique program that will strengthen your company's image and market position

## Course Outline

- |                                       |  |
|---------------------------------------|--|
| 1. Session 1: Course Overview         | 4. Session 4: Gathering Supporting     |
| Learning Objectives                   | Information                            |
| Pre-Assignment                        | Finding the Processes and People       |
| Pre-Course Assessment                 | Identifying Stakeholders               |
| 2. Session 2: Defining Onboarding     | Personal Identification                |
| What is Onboarding?                   | Putting It All Together                |
| Areas of Onboarding                   | Vision Summary Sample                  |
| Benefits for Your Business            | Activity                               |
| Costs to Consider                     | 5. Session 5: Setting Goals            |
| A Recipe for Disaster                 | The SPIRIT Model                       |
| 3. Session 3: Creating the Onboarding | 6. Session 6: Developing the Framework |
| Steering Team                         | A General Framework                    |
| Designing Your Team                   | Types of Activities                    |
|                                       | What is Pre-Work?                      |

- Pre-Work for the Manager
- Pre-Work for the Employee
- Transitioning from Pre-Work to Onboarding Activities
- Creating an Onboarding Plan Template
- Day One
- Week One
- Checking In
- Completing an Informal Review
- Month One
- Example One
- Example Two
- Setting up the Review Meeting
- Semi-Annual and Annual Reviews
- 7. Session 7: Creating an Onboarding Plan
  - Background
  - Onboarding Plan Template
- 8. Session 8: Customizing the Framework
  - Background
  - Individual Onboarding Plan
  - Activity
- 9. Session 9: Measuring Results
  - Measuring Metrics
- 10. Session 10: Branding the Program
  - Making the Onboarding Program All Your Own
- Branding River Adventures Activity
- 11. Session 11: Onboarding Executives
  - Things to Consider
- 12. Session 12: Understanding Employee Engagement
  - Present or Engaged?
  - Facts and Figures
  - The 10 C's of Employee Engagement
- 13. Session 13: Ten Ways to Make Your Program Unique
  - Ten Ways to Make Your Program Unique
- 14. Session 14: Fun and Games
  - Let's Get Creative!
  - Our Favorite Onboarding Games
- 15. Session 15: Case Study Analysis
  - Making Connections
- 16. Session 16: Personal Action Plan
  - Personal Action Plan
  - Achieving My Goals
- 17. Summary
- 18. Recommended Reading List
- 19. Post-Course Assessment

## Orientation Handbook: Getting Employees Off to a Good Start

### Course Overview

An effective human resource professional knows that managing employee performance is more than responding to problems, conducting performance reviews, or hiring staff.

Performance management begins with an orientation to the organization and the job, and continues on a daily basis as employees are trained and coached.

A thoughtful new employee orientation program, coupled with an employee handbook (or website) that communicates workplace policies, can reduce turnover and those reductions save your organization money. Whether your company has two employees or a thousand employees, don't leave employee retention to chance. Engage them from the moment they are hired; give them what they need to feel welcome, and let them impress you with what they bring to your company.

### Learning Objectives

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

### Course Outline

- |   |                                      |
|---|--------------------------------------|
| 1. Session 1: Course Overview                             | Competence                           |
| Learning Objectives                                       | Building Competence                  |
| Pre-Assignment  | Influence                            |
| Pre-Course Assessment                                     | Areas of Influence                   |
| 2. Session 2: Finding, Hiring, and Keeping                | Appreciation                         |
| Good People   | 4. Session 4: Perception             |
| Identifying Tasks   | Why Perception is Important          |
| Making Connections  | Your Perceptions                     |
| 3. Session 3: Building Employee Commitment and Engagement | 5. Session 5: Fast-Track Orientation |
| The Four Components                                       | Fast-Track Orientation               |
| Making Connections  | 6. Session 6: Designing a Successful |
| Building Commitment                                       | Orientation Program                  |
| Defining Clarity  | Using Your Experience                |
| Defining Roles  | Orientation versus Onboarding        |
| Clarity Exercise  | Making Connections                   |
|   | Mistakes to Avoid                    |

- Appraisal Where There Should Be Bonding
- Negative Orientation
- Disregarding the Employee
- Too Much Pressure, Too Late
- Summary
- Making Connections
- 7. Session 7: Characteristics of a Successful Orientation Process
  - Making Connections
- 8. Session 8: The Commitment Curve
  - Defining the Curve
  - Understanding the Curve
  - Stages of the Curve
  - Stage One: Uninformed Optimism
  - Stage Two: Informed Pessimism
  - Stage Three: Hopeful Realism
  - Stage Four: Informed Optimism
  - What Can Be Done to Bridge the Commitment Gap?
  - Applying the Curve
- 9. Session 9: Nine Orientation Habits of World-Class Employers
  - Habit One: Some Aspects of Orientation Start Right Away
  - Habit Two: An Orientation Checklist Helps Get Things Done
  - Habit Three: On-the-Job Training Includes Coaching or Mentoring
  - Habit Four: Orientation is a Process, Not an Event
  - Habit Five: Many Stakeholders are Involved
  - Habit Six: Orientation Relates Directly to the Organization's Business Plan
  - Habit Seven: Orientation is Not Just HR's Responsibility
  - Habit Eight: Focuses on Honesty, Not Quantity or Quality
  - Habit Nine: Consistency is Maintained
- 10. Session 10: Obtaining Buy-In
  - Obtaining Buy-In
- 11. Session 11: Employee Training
  - Preparing Effective Training
  - Hints for Effective Training
  - A Final Note
  - Addressing Learner Needs and Expectations
  - Making Connections
  - Learning and Training Styles
  - About the Experiential Learning Cycle
  - Building and Sustaining Interest
  - Repeat Key Points to Aid Retention
  - Provide Opportunities for Participation
  - Encouraging Participation
  - Going the Extra Mile
  - Explain the Importance of the Training Methodology
  - Case Study
- 12. Session 12: Adult Learning
  - Principles of Adult Learning
  - Applying the Principles
- 13. Session 13: Working with External Providers
  - Working with External Providers
  - Making Connections
- 14. Session 14: Helping People Make Connections
  - Establishing Good Relationships
  - Making Connections
  - Buddy, Please Help Me Out...
- 15. Session 15: Creating Employee Manuals
  - Introduction
  - Body of the Manual
  - Appendices and Index
- 16. Session 16: A Bridge to Onboarding
- 17. Session 17: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 18. Summary
- 19. Recommended Reading List
- 20. Post-Course Assessment

# Performance Management: Managing Employee Performance

## Course Overview

Inspiring someone to be their best is no easy task. Just how do you manage for optimum performance? How do you create a motivating environment that encourages people to go beyond their best? This course will give you some of those skills.

## Learning Objectives

- Understand the role of goal setting in performance management
- Have tools to help your employees set and achieve goals
- Have a three-phase model that will help you prepare employees for peak performance, activate their inner motivation, and evaluate their skills
- Have a better knowledge of motivational tools and techniques

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview             | Motivation   |
| Learning Objectives                       | The Carrot   |
| Pre-Assignment Questions                  | The Whip   |
| Pre-Course Assessment                     | The Plant  |
| 2. Session 2: The Shared Management Model | Motivation   |
| What is Performance Management?           | 6. Session 6: Phase III, Part A (Ongoing Evaluation) |
| The Rake                                  | Overview   |
| The Shared Management Model               | Characteristics of Effective Feedback                |
| About The Shared Management Model         | Case Study   |
| 3. Session 3: Setting Goals               | Individual Exercise                                  |
| Setting Goals with SPIRIT                 | Accepting Criticism                                  |
| Example: Improving My Performance         | 7. Session 7: Phase III, Part B (Formal Evaluation)  |
| Getting Into It                           | Overview   |
| 4. Session 4: Phase I (Preparation)       | Causes of Poor Performance                           |
| Overview                                  | Techniques for Success                               |
| Choosing the Right Person for the Job     | What Not To Do                                       |
| Setting Standards                         | Case Study: What Upset John?                         |
| Effective Training                        | About Performance Reviews                            |
| Coaching 101                              | Common Questions                                     |
| What Coaching is Not                      | 8. Session 8: A Personal Action Plan                 |
| What Coaching is Really About             | Starting Point                                       |
| The Coaching Toolkit                      | Where I Want to Go                                   |
| The Coaching Formula                      | How I Will Get There                                 |
| Checklist for Success                     | 9. Summary   |
| 5. Session 5: Phase II (Activation)       |  |
| Overview                                  |  |

## 10. Recommended Reading List

## 11. Post-Course Assessment

## Personal Brand: Maximizing Personal Impact

### Course Overview

Abigail Van Buren, the writer of the Dear Abby advice column, once said, “There are two kinds of people: those who come into a room with the attitude, ‘Here I am!’ and those who have the attitude, ‘There you are!’”

This course is an exploration about the type of impact people want to have in life and work. You will consider and define the influence that they can have on their life and work. You will also learn skills for success and how to create those circumstances.

### Learning Objectives

- Speak in terms of the impact and influence that you want to have in life and work
- Understand your personal style in terms of your personal brand
- Develop skills in areas such as focus, concentration, and communication (to support your brand)
- Build credibility and trust by living your brand
- Take ownership of your image, both online and in person

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview         | 5. Session Five: Looking at the Inside |
| Learning Objectives                     | Developing Focus and Concentration     |
| Pre-Assignment                          | Developing Confidence                  |
| Pre-Course Assessment                   | Four Steps for Success                 |
| 2. Session Two: Importance of a         | Framework                              |
| Personal Brand                          | Role Play                              |
| What is in a Brand?                     | 6. Session Six: Setting Goals          |
| Pre-Assignment Review                   | What Do You Want?                      |
| Defining Success                        | Go For It!                             |
| Defining Your Traits                    | Identifying Dreams and Setting Goals   |
| A Personal Brand                        | Getting SMART                          |
| Brand Elements                          | Being Flexible and Resilient           |
| Personal Brand Reflection               | 7. Session Seven: Networking for       |
| 3. Session Three: Brand Approach to     | Success                                |
| Others                                  | Tips and Tricks                        |
| Brand Style Assessment                  | Brainstorming                          |
| Debrief                                 | 8. Session Eight: Communication        |
| 4. Session Four: Looking at the Outside | Strategies                             |
| Dress for Success                       | What is Said and What is Heard         |
| What Kind of Image is Being             | Communication Situations               |
| Presented?                              | Rating Listening Ability               |
| Business Etiquette                      | Listening Assessment                   |
| How One Sounds                          | Active Listening Skills                |



- 9. Session Nine: Building Credibility
  - Defining Credibility
- 10. Session Ten: Brand You
  - Defining a Brand
  - Designing My Brand
  - Ready, Set, Draw!
- 11. Session Eleven: Living One's Brand
  - Getting Started
  - Thinking Out Loud
- 12. Session Twelve: Managing Social Media Presence
  - Managing Social Media Presence
- 13. Session Thirteen: Having Influence
  - Persuasion Techniques
  - Negotiation Techniques
- Expressing One's No
- 14. Session Fourteen: Dealing with Challenging People
  - Getting to the Heart of the Problem
  - What is Missing?
  - The Three F's
  - Dealing with Challenging People
- 15. Session Fifteen: Presentations and Meetings
  - Speak, by all Means!
  - Preparing for Meetings
- 16. Personal Action Plan
- 17. Course Summary
- 18. Recommended Reading List
- 19. Post-Course Assessment

## Pest Management

### Course Overview

This course teaches how to identify pests, prevent pests from entering a facility, and treat pest infestations.

### Learning Objectives

- Identify reasons why pests are dangerous for a food facility.
- Understand characteristics of common pests.
- Recognize signs of pests inside a facility.
- Prevent pests from entering the facility.
- Deny food and shelter for common pests.
- Work with a licensed pest control officer for pest problems.
- Store pesticides properly inside a facility.

### Course Outline

- |  |                                      |
|--|--------------------------------------|
| 1. Session One: Course Overview                  | Cockroach Case Study                 |
| Learning Objectives                              | 3. Session Three: Treating for Pests |
| Pre-Assignment                                   | Using a Pest Control Officer         |
| Pre-Course Assessment                            | Choosing a PCO                       |
| 2. Session Two: Identifying and Preventing Pests | Treatment                            |
| Types of Pests                                   | Using Pesticides                     |
| Identifying Pest Indicators                      | Pre-Assignment Review                |
| Preventing Entry                                 | 4. Personal Action Plan              |
| Denying Food and Shelter                         | 5. Course Summary                    |
|  | 6. Recommended Reading List          |
|  | 7. Post-Course Assessment            |

# Planning for Workplace Safety

## Course Overview

Planning for Workplace Safety will help you develop your organizational safety plan, which is one of the most important documents a company can produce.

## Learning Objectives

- Explain what a safety plan will include
- Understand and write an organizational safety policy
- Know the importance of the Introduction to the safety plan
- Develop a basic communication plan for a specific accident/incident occurrence
- Implement training solutions to prevent common accidents/incidents
- Understand and explain the importance and structure of incident response plans and critical incident response plans
- Understand safety inspections and safety audits as methods to identify unsafe conditions and apply corrective action
- Use a 6S inspection checklist to conduct a 6S inspection
- Brainstorm policies and procedures that you might find in the appendix of a safety plan
- Help your organization write, implement, and review a safety plan

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                      | The Communication Plan                   |
| Learning Objectives                                  | Develop a Communication Plan             |
| Pre-Assignment                                       | 6. Session Six: Safety Training          |
| Pre-Course Assessment                                | Training                                 |
| 2. Session Two: Writing a Safety Plan                | Health and Safety Representatives        |
| Elements of the Plan                                 | Other Employees                          |
| Other Tips to Keep In Mind                           | Contractors and Visitors                 |
| 3. Session Three: Organizational Safety Policy       | Employee Orientation                     |
| Policy Statement                                     | Training Decisions                       |
| Develop a Statement                                  | 7. Session Seven: Incident Response Plan |
| 4. Session Four: Introduction to the Safety Plan     | (with Critical Incident Response Plan)   |
| The Introduction                                     | Understanding the Processes              |
| Purpose and Expectations of the Safety Plan          | Why Do We Investigate Incidents?         |
| Responsibilities for Safety                          | Investigation Process                    |
| 5. Session Five: Communication Plan                  | Incident Response Plan                   |
| About the Plan                                       | Critical Incident Response Plan          |
| Considerations in Developing your Communication Plan | Develop a Procedure                      |
| What to Communicate                                  | 8. Session Eight: Safety and Health      |
| Key Actions in Communicating Effectively             | Inspections (with 6S)                    |
|  | Safety and Health Inspections            |
|  | Frequency of Inspections                 |
|  | The Beginnings: 5S                       |

Adding Safety: 6S  
6s Roles  
Conduct an Inspection  
9. Session Nine: Safety Audits  
Audit Primer  
Types of Audits  
Audit Primer

10. Session Ten: Adding an Appendix  
The Appendix  
11. Personal Action Plan  
12. Course Summary  
13. Recommended Reading List  
14. Post-Course Assessment

# Preventing and Responding to Workplace Violence

## Course Overview

Workplace violence is a widespread issue, with studies showing that each year millions of workers experience threats, harassment, or physical assaults on the job. It poses serious risks to the safety, well-being, and productivity of any organization. Understanding how to recognize, prevent, and respond to workplace violence helps create a safer and more respectful environment for all employees.

Leaders play a critical role in reducing risk and responding to workplace violence appropriately. This course will explore the definitions and types of workplace violence, guide you through risk and threat assessments, and provide practical tools for policy development, intervention and de-escalation, and emergency response. You will leave with a clearer understanding of your responsibilities and greater confidence in addressing potential incidents before they escalate.

## Learning Objectives

- Define workplace violence.
- Spot the warning signs for violence.
- Assess the workplace for possible safety and security risks.
- List elements of a workplace violence policy and corresponding programs.
- Understand and apply intervention techniques to prevent and mitigate violence.
- Describe the threat assessment process and steps in the initial response to a threat.
- Demonstrate how to develop a basic emergency response plan.
- Explain the steps and value of a post-incident assessment and debriefing

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                  | Developing a Program                                 |
| Learning Objectives                              | 6. Session Six: Workplace Design                     |
| Pre-Assignment                                   | Security Systems and Personnel                       |
| Pre-Course Assessment                            | Layout Issues with the Acme Widgets Company          |
| 2. Session Two: What is Workplace Violence?      | 7. Session Seven: Intervention Techniques            |
| Defining Workplace Violence                      | Early Intervention                                   |
| 3. Session Three: Risk Assessment                | Improving Communication                              |
| The Five Stages                                  | Responding to Anger                                  |
| Risk Assessment for the Acme Widgets Company     | Questioning Skills                                   |
| 4. Session Four: Developing a Policy and Program | 8. Session Eight: Immediate Response                 |
| The Policy                                       | Responding to a Threat                               |
| Programs and Procedures                          | Case Study   |
| 5. Session Five: Training Programs               | 9. Session Nine: Developing Emergency Response Plans |

Guide to Developing a Plan  
10. Session Ten: After an Incident  
Outcomes and Post-Incident Assessment

11. A Personal Action Plan  
12. Summary  
13. Recommended Reading List  
14. Post-Course Assessment

## Problem Solving and Decision Making

### Course Overview

Many people lack the necessary skills to effectively solve problems and make decisions. Having a process in place can help with this.

### Learning Objectives

- Apply problem-solving steps and tools
- Analyze information to clearly describe problems
- Identify appropriate solutions
- Think creatively and be a contributing member of a problem-solving team
- Select the best approach for making decisions
- Create a plan for implementing, evaluating, and following up on decisions
- Avoid common decision-making mistakes

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview            | Solving Problems the “Right” Way              |
| Learning Objectives                        | Real Problems                                 |
| Pre-Assignment                             | Making Connections                            |
| Pre-Course Assessment                      | Phase One                                     |
| 2. Session Two: Definitions                | Phase Two                                     |
| Defining Problem-Solving and               | Phase Three                                   |
| Decision-Making                            | Solution Planning Worksheet                   |
| Problem Identification                     | 6. Session Six: Case Study                    |
| Eight Essentials to Defining a Problem     | The Truck Case Study                          |
| Problem-Solving in Action                  | Making Connections                            |
| 3. Session Three: Making Decisions         | 7. Session Seven: The Problem-Solving Toolkit |
| Making Winning Decisions                   | The Basic Tools                               |
| Three Types of Decisions                   | Legitimizing Problems and Positions           |
| Advice from an Expert                      | The Fishbone                                  |
| Facts vs. Information                      | Degrees of Support                            |
| Eight Ingredients for Good                 | Creative Thinking Methods: Brainstorming      |
| Decision-Making                            | Limitations of Brainstorming                  |
| Decision-Making Traps                      | Brainwriting                                  |
| 4. Session Four: Getting Real              | Mind-Mapping                                  |
| Pre-Assignment Review                      | Brainstorming and Brainwriting                |
| Case Study                                 | More Methods                                  |
| 5. Session Five: The Problem-Solving Model | 8. Session Eight: Aspirinia                   |
| Model Overview                             | Decision Information                          |
| The Problem-Solving Model                  | Individual Action Steps                       |
| Another Perspective                        |   |
| Keeping an Open Mind                       | 9. Session Nine: Swotting Up                  |

- SWOT Analysis
- SWOT Matrix
- SWOT Checklist
- Individual Analysis
- 10. Session Ten: Making Good Group Decisions
  - Working Toward the Decision
  - Avoiding Fatal Mistakes
  - New, Appeal and Feasibility (NAF)
  - Technique
  - Visualization
  - Benefits Possibilities Concerns (BPC)
  - Technique
- 11. Session Eleven: Analyzing and Selecting Solutions
  - Selecting Criteria
- Creating a Cost-Benefit Analysis
- Making Connections
- 12. Session Twelve: Planning and Organizing
  - Introduction
  - Follow-Up Analysis
  - Evaluate
  - Adapt, Close, and Celebrate
- 13. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 14. Course Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment



## Process Improvement with Gap Analysis

### Course Overview

Charles Kettering, an inventor for General Motors, once said, “A problem well-stated is half-solved.” The gap analysis tool can help you define problems and identify areas for process improvement in clear, specific, achievable terms. It can also help you define where you want to go and how you are going to get there.

This course will give you the skills that you need to perform an effective gap analysis that will solve problems, improve processes, and take your project, department, or organization to the next level.

### Learning Objectives

- Define the term “gap analysis”
- Identify different types of gap analyses
- Perform all stages of the gap analysis process
- Create a gap analysis report

### Course Outline

- |  |                                       |
|--|---------------------------------------|
| 1. Session 1: Course Overview          | Sample SWOT                           |
| Learning Objectives                    | The Five Whys Technique               |
| Pre-Assignment                         | Example                               |
| Pre-Course Assessment                  | The Fishbone Diagram                  |
| 2. Session 2: What is Gap Analysis?    | About the Diagram                     |
| Defining Gap Analysis                  | Making Connections                    |
| Where Gaps Occur                       | 5. Session 5: Creating a Gap Analysis |
| The Business Case for Gap Analysis     | Report                                |
| Types of Gap Analyses                  | Essential Elements of a Gap Analysis  |
| Making Connections                     | Report                                |
| 3. Session 3: The Gap Analysis Process | Extra Elements                        |
| Process Overview                       | 6. Session Six: Test Driving          |
| Recording the Data                     | Pre-Assignment Review                 |
| Step One: Identify the Future State    | Toolbox                               |
| Step Two: Identify the Current State   | SWOT Analysis                         |
| Step Three: Measure the Gap            | Five Whys                             |
| Step Four: Create an Action Plan       | 7. Session 7: A Personal Action Plan  |
| Step Five: Implement and Follow Up     | Starting Point                        |
| Making Connections                     | Where I Want to Go                    |
| 4. Session 4: Supporting Tools         | How I Will Get There                  |
| The McKinsey 7S Model                  | 8. Summary                            |
| The 7S Framework                       | 9. Recommended Reading List           |
| About the Elements                     | 10. Post-Course Assessment            |
| SWOT Analysis                          |                                       |

# Progressive Discipline

## Course Overview

Hiring someone is a significant investment for any organization. When an employee exhibits inappropriate behavior, progressive discipline can help your organization maintain that investment by assisting employees with understanding that their actions provide an opportunity to improve their success at work.

## Learning Objectives

- Realize the importance of onboarding and performance management in minimizing disciplinary issues
- View discipline as a positive part of ensuring employee success
- Differentiate between performance problems and misconduct
- Decide appropriate levels of discipline, considering escalation and mitigating circumstances
- Outline the necessary information to include in a discipline policy
- List the methods to communicate a discipline policy
- Define a progressive discipline process
- Describe the steps of a progressive discipline process
- Use informal structured guidance for minor misconduct or performance issues
- List supports that can be provided to improve the success of employees
- Perform verbal warnings, written warnings, performance improvement plans, and terminations

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                | Communicating the Policy                   |
| Learning Objectives                            | 5. Session Five: Progressive Discipline    |
| Pre-Assignment                                 | Progressive Discipline                     |
| Pre-Course Assessment                          | The Four-Step Progressive Disciplinary     |
| 2. Session Two: Minimizing Disciplinary Issues | System                                     |
| Onboarding                                     | Progressive Discipline Processes           |
| Performance Management                         | Informal Structured Guidance               |
| The Shared Management Model                    | Informal Guidance Supports                 |
| 3. Session Three: Discipline                   | 6. Session Six: Step 1 - Verbal Warning    |
| What is Discipline?                            | Verbal Warning                             |
| Disciplinary Issues                            | Detailed Step One: Verbal Warning          |
| Poor Performance and Misconduct                | Verbal Warning Role Play                   |
| Appropriate Level of Discipline                | 7. Session Seven: Step 2 - Written Warning |
| 4. Session Four: Discipline Policy             | Written Warning                            |
| Creating The Policy                            | Escalating Discipline                      |
| Discipline Policy Elements                     | Written Warning Scenarios                  |

- |   |                               |
|---|-------------------------------|
| 8. Session Eight: Step 3 - Performance Improvement Plan | Termination                   |
| What is a Performance Improvement Plan?                 | The Termination Meeting       |
| Escalating Discipline                                   | Termination Meeting Role Play |
| Case Study: Developing Improvement Goals                | 10. Personal Action Plan      |
| 9. Session Nine: Step 4 - Termination                   | 11. Course Summary            |
|   | 12. Recommended Reading List  |
|   | 13. Post-Course Assessment    |

# Project Management: All You Need to Know

## Course Overview

Project management is no longer only for mega projects worth hundreds of thousands of dollars. Small projects can benefit from project management tools. These time tested tools can help you to get that small project done well, done under budget, and done on time. This workshop is not intended for those looking to be certified as project managers but rather for those who complete projects at work from time to time.

In this course, you will gain experience using the most common project management execution tools from Project Tracking Forms, Risk Monitoring Tables to Communications Plans, Change Request Forms, Issues Logs and Lessons Learned Forms. Your small projects will be more successful than ever!

## Learning Objectives

- Understand what is meant by a project
- Know how to use simple tools to keep your project on track and on task while identifying risks
- Be able to develop a simple small project communications plan
- Understand simple tools to manage change and issues in your small project
- Know how to conduct an effective status meeting
- Be able to close out a project and determine lessons learned

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview           | 4. Session 4: Communications Plan          |
| Learning Objectives                     | The Four Components                        |
| Pre-Assignment                          | Who  |
| Pre-Course Assessment                   | When                                       |
| 2. Session 2: Project Management Review | What                                       |
| The Project Life Cycle                  | How  |
| Phase One - Initiating                  | Tips                                       |
| Phase Two - Planning                    | Communications Plan Activity               |
| Phase Three - Executing                 | 5. Session 5: Changes and Project Tracking |
| Phase Four - Closing                    | Controlling Changes                        |
| Monitoring and Controlling              | Change Requests Tracking                   |
| Project Planning Document               | Making Connections                         |
| 3. Session 3: Executing the Plan        | Project Tracking Tools                     |
| Managing Small Projects                 | 6. Session 6: Status Meetings and Issues   |
| Keeping on Track                        | Management                                 |
| Keeping on Task                         | Status Meetings                            |
| Scope Creep Video                       | Issues Management                          |
| Monitoring and Controlling Risk         | Status Meeting Exercise                    |

- 7. Session 7: Closing the Project
  - Closing a Project
  - Other Project Closing Steps
  - Lessons Learned
  - Lessons Learned Final Activity
- 8. A Personal Action Plan
  - Starting Point

- Where I Want to Go
  - How I Will Get There
- 9. Course Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment
- 12. Course Completion

# Project Management Fundamentals

## Course Overview

Project management is not just for construction engineers and military logistics experts anymore. Today, in addition to the regular duties of the jobs of supervisors and managers, they are often expected to take on extra assignments, and to get that additional job done well, done under budget, and done on time.

This course is intended to make you familiar with the most common terms and practices in terms of working on projects.

## Learning Objectives

- Describe what is meant by a project
- Explain what project management means
- Identify benefits of projects
- Identify the phases of a project's life cycle
- Sell ideas and make presentations related to pitching a project
- Prioritize projects
- Begin conceptualizing a project, including goals and vision statements
- Use project planning tools
- Contribute to creating a Statement of Work

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                          | The Benefits of Projects                |
| Learning Objectives                                      | Case Study: Mary Marvelous              |
| Pre-Assignment   | 6. Session Six: A Project's Life Cycle  |
| Pre-Course Assessment                                    | Project Phases                          |
| 2. Session Two: Defining Projects and Project Management | Stages of a Project                     |
| What is a Project?                                       | Ensuring a Project Succeeds             |
| Who Are the Key Players?                                 | 7. Session Seven: Project Support       |
| 3. Session Three: The Role of a Project Manager          | Is the Project Worth doing?             |
| Setting Sights   | The Priority Matrix                     |
| Bringing the Team Together                               | 8. Session Eight: Creating a Vision     |
| Key Skill Areas  | The Vision Process                      |
| 4. Session Four: Aspects of a Project                    | Making Connections                      |
| Projects   | 9. Session Nine: Project Goals          |
| Eight Aspects of a Project                               | The Importance of Project Goals         |
| 5. Session Five: Personal Benefits of Project Work       | Project Goals                           |
|  | 10. Session 10: Using a Target Chart    |
|  | Creating a Target Chart                 |
|  | 11. Session Eleven: Preparing a Project |

Things to Consider  
12. Session Twelve: Detailing the Project  
The Statement of Work  
Individual SOW

13. A Personal Action Plan  
14. Course Summary  
15. Recommended Reading List  
16. Post-Course Assessment

# Project Management Principles and Performance Domains

## Course Overview

Project management has evolved over the past few years due to emerging technology, new approaches (predictive, traditional, adaptive, Agile, hybrid, etc.) and rapid market changes. It is important now more than ever for project managers to understand common project management principles and performance domains.

## Learning Objectives

- Relate principles and performance domains with your project management approach
- Understand what internal and external environmental factors are
- Identify and foster high performing teams
- Describe cadence and tailoring
- Understand the importance of metrics to measure outcomes and results
- Know the life cycle and phases of a project
- Illustrate what predictive approaches and incremental approaches are
- Explain the difference between cost of quality and cost of change
- Understand the concept of uncertainty and its significance to projects

## Course Outline

- |   |                                       |
|---|---------------------------------------|
| 1. Session One: Course Overview             | The Principles: Leadership            |
| Learning Objectives                         | The Principles: Tailoring             |
| Pre-Assignment                              | The Principles: Quality               |
| Pre-Course Assessment                       | Dimensions of Quality                 |
| 2. Session Two: ANSI Standard and PMBOK 7   | Navigate Complexity                   |
| Guide Overview                              | The Principles: Risk                  |
| ANSI Standard and PM BOK 7 Guide            | Risk Response                         |
| Overview                                    | Embrace Adaptability and Resilience   |
| 3. Session Three: Value Delivery System and | The Principles: Change Management     |
| Environmental Factors                       | 5. Session Five: Performance Domain – |
| Value Delivery System                       | Stakeholders                          |
| Environmental Factors                       | Key Terms                             |
| Governance                                  | Stakeholder Engagement                |
| 4. Session Four: Project Management         | Identifying Stakeholders              |
| Principles                                  | Understand and Analyze Stakeholders   |
| The Principles                              | Prioritize and Engage Stakeholders    |
| The Principles: Stewardship                 | Communication                         |
| Code of Ethics                              | Case Study                            |
| The Principles: Team                        | Who Are You Communicating With?       |
| The Principles: Stakeholders                | What Are You Talking About?           |
| The Principles: Value                       | When Will You Deliver Your Message?   |
| The Principles: Holistic Thinking           |                                       |



- How Are You Going to Deliver Your Message?
- Why Are You Delivering This Message?
- Putting It Together — The Communication Plan
- Communication Plan Activity
- Monitoring
6. Session Six: Performance Domain – Team
    - Key Terms
    - Team Management
    - Centralized Management and Leadership Versus Distributed Management and Leadership
    - Team Management
    - Leading A Team
    - The Situational Leadership II® Model
    - Your Comfort Zone
    - Servant Leadership
    - Team Development
    - High-Performing Teams
    - Shaping Team Culture
    - Creating a Safe, Respectful, Non-judgmental Project Environment
    - Leadership Skills
    - Exploring Leadership Skills
    - Leading a Team
  7. Session Seven: Performance Domain – Development and Life Cycle
    - Key Terms
    - Cadence
    - Development Approach
    - Predictive Project Management Approach
    - Adaptive Project Management Approach
    - Hybrid Project Management Approach
    - Selecting a Developmental Approach
    - Life Cycles and Phases
    - The Predictive Project Life Cycle
    - Phase One — Conceptual
    - Phase Two — Planning
    - Phase Three — Executing
    - Phase Four — Closing
    - Monitoring and Controlling
  8. Session Eight: Performance Domain – Planning
    - Key Terms
    - Planning
    - Delivery
    - Estimating
    - Presenting and Adjusting Estimates
    - Absolute versus Relative Estimating
    - Flow-based Estimating
    - Schedules
    - Task Dependencies
    - Schedules
    - Setting a Schedule
    - Adaptive Scheduling
    - The Importance of Budgeting
    - Project Team Composition and Structure
  9. Session Nine: Performance Domain – Project Work
    - Key Terms
    - Project Processes
    - Focus on Lean Project Methods
    - The Automobile Industry
    - Lean Project Management Principles
    - Identifying Waste in Value Stream Mapping
    - Leading Project Realization
    - Working with Procurements
    - Choosing a Vendor
    - Monitoring New Work and Changes
    - Learning Throughout the Project
  10. Session Ten A: Performance Domain – Delivery
    - Key Terms
    - Delivery of Value
    - Deliverables
    - Scope Definition
    - Steps for Creating the Work Breakdown Structure
    - Defining a Scope using A Work Breakdown Structure (WBS)
    - Completion of Deliverables
    - WBS Dictionary

- Moving Targets of Completion
- 11. Session Ten B: Performance Domain –
  - Delivery
  - Key Terms
  - Cost of Quality
  - Cost of Quality Activity
  - Cost of Change
  - Suboptimal Outcomes
- 12. Session Eleven: Performance Domain –
  - Measurement
  - Key Terms
  - Performance Measurement
  - Establishing Effective Measures
  - Smart KPI
  - What to Measure?
  - Presenting Information: Dashboards
  - Presenting Information: Information Radiators/Big Visible Charts (BVCs)
  - Effective Information Radiator/BVC
- Visual Controls
- Measurement Pitfalls
- Troubleshooting Performance
- 13. Session Twelve: Performance Domain –
  - Uncertainty
  - Key Terms
  - Uncertainty
  - General Uncertainty
  - Ambiguity
  - Complexity
  - Project Factors Affecting Complexity
  - Volatility
  - Risk
  - Risk Identification
  - Risk Response Strategies
- 14. Personal Action Plan
- 15. Course Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment

# Project Management Training: Understanding Project Management

## Course Overview

Project management isn't just for construction engineers and military logistics experts anymore. Today, in addition to the regular duties of your job, you are often expected to take on extra assignments and to get that additional job done well, done under budget, and done on time. This course is not intended to take you from a supervisory or administrative position to that of a project manager. However, this course will familiarize you with the most common terms and the most current thinking about projects.

In this course, we will walk you through the nuts and bolts of project management, from setting priorities to controlling expenses and reporting on the results. You may still have to cope with the unexpected, but you'll be better prepared.

## Learning Objectives

- Understand what is meant by a project
- Recognize what steps must be taken to complete projects on time and on budget
- Have a better ability to sell ideas and make presentations
- Know simple techniques and tools for planning and tracking your project
- Have methods for keeping the team focused and motivated

## Course Outline

- |   |                                       |
|---|---------------------------------------|
| 1. Session 1: Course Overview           | Phase Three                           |
| Learning Objectives                     | Phase Four                            |
| Pre-Assignment                          | Milestones                            |
| Why a Project?                          | Why Do Projects Fail?                 |
| How Does This Fit Into the Course?      | Overview of Success Factors           |
| Applying the Learning                   | Three Ways to End a Project           |
| Pre-Course Assessment                   | 7. Session 7: Selling a Project       |
| 2. Session 2: What is a Project?        | Tom Peters                            |
| What is a Project?                      | Bringing Ideas Forward                |
| Definitions of a Project                | Selling Your Project                  |
| 3. Session 3: Project Management Basics | The Priority Matrix                   |
| What is Project Management?             | Using the Matrix                      |
| 4. Session 4: Pre-Assignment Review     | Priority Quadrants                    |
| Eight Project Categories                | 8. Session 8: Preparing Your Project  |
| 5. Session 5: How Can Projects Help Me? | Things to Consider                    |
| The Benefits of Projects                | 9. Session 9: Preparing Your Project  |
| Case Study: Mary Marvelous              | A Project Manager's Skills            |
| 6. Session 6: A Project's Life Cycle    | To Be Completed By Proposer           |
| The Life Cycle                          | To Be Completed By Proposer's Manager |
| Phase One                               | Bring the Team Together               |
| Phase Two                               | Key Skills                            |

10. Session 10: Project Goals
  - Goals with SPIRIT!
  - Project Goals
  - Making Connections
11. Session 11: Laying Out the Project
  - The Statement of Work
  - Defined Purpose
  - Project Deliverables
  - To Be Completed By Proposer's Manager
  - Goals and Objectives
  - SWOT
  - Cost and Schedule Estimates
  - List of Stakeholders
  - Authority Levels
  - Assumptions and Agreements
  - The Communication Plan
  - Individual SOW
  - Project Planning Worksheet
  - Time Management
  - Cost Controls
  - Results Expected
  - Approvals
  - Writing Reports
  - Four Stages in Report Writing
  - Basic Formats
12. Session 12: Project Risks
  - Risk Tolerance Exercise
  - About Risks
  - Reducing Risks
  - Sources of Risk
  - Constraints
13. Session 13: Contingency Planning
  - Contingency Planning
  - Components of a Contingency Plan
14. Session 14: What Really Needs To Be Done?
  - Beginning to Plan
  - Preparing a Basic Schedule
  - Estimating Time
  - Float Time
  - Scheduling Checklist
  - Activity Scheduling
  - Scheduling My Project
15. Session 15: The Work Breakdown Structure
  - The Work Breakdown Structure
  - Sample WBS
16. Session 16: Planning Tools
  - Two Basic Tools
  - Milestone Charts
  - PERT
  - PERT Diagrams
  - Along the Critical Path
  - Gantt Charts
  - The Network Diagram
  - Revealing Workflow
  - Five Steps to Create a Network Diagram
  - More About Network Diagrams
  - Network Diagrams Conclusion
  - The Flow Chart
17. Session 17: Budgets
  - Component Costs
  - Budget Methods
  - Making Connections
  - Costs and Time
  - Budget Controls
18. Session 18: Teamwork
  - Why is Teamwork Important?
  - Building a Winning Team
  - Tips for Building a Winning Team
19. Session 19: Developing Teams
  - Four Issues to Address with Project Teams
  - Checklist for Success
  - Team Development
  - Forming
  - Storming
  - Norming
  - Performing
  - Adjourning
20. Session 20: Teamwork
  - Introduction
  - Individual Action Steps
21. Session 21: Communication Tips
  - Communicating as Project Manager
22. Session 22: Closing Out a Project
  - Closing Smoothly

- 23. Session 23: Team Meetings
  - Coordinating Team Meetings
  - During the Meeting
  - Effective Meeting Management
  - Making Committees Work
  - Assigning Work
- 24. Session 24: Presentation Primer
  - Project Management Presentation
  - Presentation Strategies
  - Speaking with Confidence
- 25. Session 25: Project Presentations
  - Preparation Time
  - Evaluation Worksheet
- 26. Session 26: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 27. Summary
- 28. Recommended Reading List
- 29. Post-Course Assessment

## Project Planning: All You Need to Know

### Course Overview

Project management is no longer only for mega projects worth hundreds of thousands of dollars. Small projects can benefit from project management tools. Statements of Work, Work and Resource Breakdown Structures and Project Planning documents can help you to get that small project done well, under budget, and on time. This workshop is not intended for those looking to be certified as project managers but rather for those who complete projects at work from time to time.

In this course, you will gain experience using the most common project management planning tools and will completely plan a case study project from Statement of Work through Work and Resource Breakdown, Scheduling and end up with a completed Project Planning Worksheet. Your small projects will be more successful than ever!

### Learning Objectives

- Understand what is meant by a project
- Distinguish between a Project Charter and Statement of Work (SOW)
- Use a SOW to begin project planning
- Create a Work Breakdown Structure to determine tasks needed to complete a small project
- Create a project schedule based on project tasks and resources
- Create a Resource Breakdown Structure to determine specific resources needed to complete a small project
- Complete a Project Planning Worksheet to act as a touchstone for project completion

### Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                | Project Charter                            |
| Learning Objectives                          | What is a Project Charter?                 |
| Pre-Assignment                               | When do I use a Project Charter?           |
| Pre-Course Assessment                        | Climate Change Training Program Exercise   |
| 2. Session 2: Project Management Basics      | Statement of Work                          |
| The Project Life Cycle                       | SOW: Commercial Vegetable Garden           |
| Phase One - Initiating                       | 4. Session 4: The Work Breakdown Structure |
| Phase Two - Planning                         | Sample WBS                                 |
| Phase Three - Executing                      | Creating a Work Breakdown Structure        |
| Phase Four - Closing                         | Work Breakdown Structure Exercise          |
| Monitoring and Controlling                   | 5. Session 5: Preparing a Basic Schedule   |
| Project Management                           | Critical Elements for Success              |
| The Role of a Project Manager                | Gathering Resources                        |
| Key Project Management Skills                | Activity List                              |
| 3. Session 3: Beginning the Project Planning | Estimating Task Times                      |

- Planning and Scheduling Your Garden Project
- Tips for Increasing Estimation Accuracy
- 6. Session 6: Resource Breakdown Structure
  - What is a Resource?
  - Resource Breakdown Structure
  - Sample Resource Breakdown Structure
  - Creating the Resource Breakdown Structure
  - Availability and Skills
- Resource Breakdown Structure:  
Commercial Vegetable Garden
- 7. Session 7: Project Planning Worksheet Planning Worksheet
- 8. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 9. Course Summary
- 10. Recommended Reading List
- 11. Post-Course Assessment

## Promoting a Marketing Webinar

### Course Overview

This course focuses on the essential steps to promoting a marketing webinar that connects with your target audience and generates your desired results.

### Learning Objectives

- Define the marketing objectives of your webinar
- Create an attendee avatar to connect with your target audience
- Create and use a lead magnet
- Develop a promotion strategy
- Explore the potential of a joint venture
- Create a webinar marketing calendar

### Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: The Webinar
  - What is a Webinar? Why Use Webinars?
  - Pre-Assignment Review
  - Your Webinar Marketing Objectives
  - Marketing Webinars
3. Session Three: The Participant
  - Determine a Participant Profile
  - The Nine-Step Ideal Participant Profile Process
  - Ideal Participant Profile Activity
  - Where Does Your Participant Hang Out?
4. Session Four: Lead Magnets
  - What is a Lead Magnet?
  - Creating a Lead Magnet
  - The Things to Consider When Choosing a Lead Magnet
  - Lead Magnet Outline Activity
5. Session Five: Promotion Strategy
  - What is Your Promotion Strategy?
  - Promo Time Activity
6. Session Six: Joint Ventures
  - Webinar Marketing Calendar
  - Building Your Calendar
  - Successful Joint Ventures
  - Steps to a Successful Joint Venture
  - Joint Venture Activity
  - Joint Venture Promotion
  - Joint Venture Proposal
7. Session Seven: Landing Pages
  - Creating a Landing Page
  - Long Version Landing Page
  - Short Version Landing Page
  - Thank-you Email and Registration Confirmation
  - Your Turn
8. Session Eight: Re-Evaluating
  - Re-Evaluating First Impressions
9. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
10. Course Summary
11. Recommended Reading List
12. Post-Course Assessment



## Prospecting for Leads Like a Pro

### Course Overview

Prospecting is one of the keys to your sales success. Keeping your pipeline full ensures that you will continue to attract new business, and so your success today is a result of the prospecting you did six months ago. Today, you will become skilled at prospecting and learn the 80/20 rule. After today, you will know who to target and how to target them, and commit to do some prospecting every day through warming up cold calls, following up on leads, or networking. You will also build your personal prospecting plan and learn how to ensure your future by planting seeds daily.

### Learning Objectives

- Understand the importance of expanding your client base through effective prospecting
- Learn how to use a prospecting system to make you more successful
- Identify target markets and target companies with the 80/20 rule in mind
- Develop and practice networking skills at every opportunity
- Develop, refine, and execute the art of cold calling

### Course Outline

- |                                     |   |
|-------------------------------------|---|
| 1. Session 1: Course Overview       | Market Profile                              |
| Learning Objectives                 |   |
| Pre-Assignment                      | 4. Session 4: The Prospect Dashboard        |
| Pre-Course Assessment               | The Prospect Dashboard and CRM Tools        |
| 2. Session 2: Pre-Assignment Review | Sample Dashboard                            |
| True/False Questions                | So How Does It Work?                        |
| A Positive Self-Image               | Dashboard Q & A                             |
| Multiple Choice Questions           | My Prospect Dashboard                       |
| Reviewing the Assignment            | Planning with the Prospect Dashboard        |
| 3. Session 3: Targeting Your Market | The Purchasing Cycle                        |
| A Narrow Focus                      | Planning Worksheet                          |
| Narrowing Your Focus                | 5. Session 5: Setting Goals                 |
| Where are Your Customers?           | Setting Goals                               |
| Common Characteristics              | SPIRIT                                      |
| What Makes Them Buy?                | Setting a Goal with SPIRIT!                 |
| Perform an Analysis                 | 6. Session 6: Why Is Prospecting Important? |
| Listen to Them                      | Working with Prospects                      |
| Are You Listening?                  | Finding Prospects                           |
| Summarize                           | A Little Knowledge Brings Big Benefits!     |
| Use Analytical Tools                | Are You Experienced?                        |
| Customer Profile                    | 7. Session 7: Networking                    |
| Customer Location                   | What is Networking?                         |
|                                     | How Do You Do It?                           |

- Preparation
- Starting to Mingle
- Walking Into a Room
- What to Do and Say
- Enjoy Yourself and Keep It Going
- Working on the Strategies
- Small Talk
- 8. Session 8: Public Speaking
  - Public Speaking Like a Pro
  - What Signals Are You Sending?
  - Using Our Body Language
  - Your Presentation Style
- 9. Session 9: Trade Shows
  - Before the Show
  - During the Show
  - After the Show
  - Attending a Trade Show
- 10. Session 10: Regaining Lost Accounts
  - Why Do Customers Leave?
  - When Something Goes Wrong
  - What Can I Do About It?
  - Regaining Your Contacts
- 11. Session 11: Warming Up Cold Calls
  - The Magic Number
  - A Cure for Call Reluctance
  - Other Tips for Making Calls
  - Getting Your Message Through
  - Openers
- Creating Your Opener
- Warming Up Cold Calls
- My Cold Call Strategy
- 12. Session 12: The 80/20 Rule
  - Pareto's Principle
  - Applying Pareto's Principle
- 13. Session 13: It's Not Just a Numbers Game
  - Shooting for the Stars
  - Rapport
  - Creating Rapport
  - Relationship Building
  - Building Relationships
  - Respect
  - Showing Respect
- 14. Session 14: Going Above and Beyond
  - 21 Ideas for a Successful Career in Sales
  - Implementing the 21 Ideas
  - Ten Questions to Ask Yourself about Each Prospect
  - Asking the Ten Questions
- 15. Session 15: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 16. Summary
- 17. Recommended Reading List
- 18. Post-Course Assessment

# Psychological Health and Safety

## Course Overview

Scientific evidence shows that when businesses adopt policies and programs to address psychological health and safety, costs that are incurred related to psychological health issues are between 15 and 33 per cent lower. Psychological health and safety is a shared responsibility between the individual and the workplace. Safe spaces are best created and supported when individuals take responsibility for their own mental health, and workplaces develop policies and programs tailored to the unique needs of the space and those functioning within it. This course will introduce basic concepts of individual health and wellness and workplace psychological safety to support well-being and effective choices for both the employee and the workplace.

## Learning Objectives

- Understand basic concepts of personal mental health
- Know what psychological workplace safety is and why it is important
- Identify the factors influencing personal mental health and safety in your workplace
- Consider assessment and action strategies for personal and workplace needs
- Engage key participants in workplace programs
- Explore methods of evaluation and continuous improvement

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | Case Study                                |
| Learning Objectives                          | Making Connections                        |
| Pre-Assignment                               | 5. Session Five: Factors Affecting        |
| Pre-Course Assessment                        | Psychological Safety                      |
| 2. Session Two: You and Your Mental Health   | Psychosocial Factors                      |
| Mental Health Defined                        | The Physical Connection                   |
| Mental and Physical Health                   | 6. Session Six: Creating a Safe Workplace |
| Mind-Body Connection                         | Environment                               |
| Making Connections                           | Workplace Assessment                      |
| 3. Session Three: Personal Mental Health     | Engaging Key Personnel                    |
| Strategies                                   | Supporting Evolution                      |
| Emotional Intelligence                       | Evaluation and Continuous Improvement     |
| Understanding Emotions                       | Psychological Safety Plan for the         |
| The EI Blueprint                             | Workplace                                 |
| SMART Goals                                  | Making Connections                        |
| Planning for Your Mental Well-being          | 7. Personal Action Plan                   |
| 4. Session Four: Psychological Safety in the | 8. Course Summary                         |
| Workplace                                    | 9. Recommended Reading List               |
| Psychological Safety Defined                 | 10. Post-Course Assessment                |
| Importance of Psychological Safety           |   |

# Public Relations Boot Camp

## Course Overview

The field of public relations has changed with the evolution of computers and the speed with which information can spread. However, the need for public relations to be clear, concise, and accurate while being completely appropriate for the situation has not changed. In this comprehensive course, you will learn how to determine the type of information required, to approach PR strategically, create compelling releases, and manage your media relations.

## Learning Objectives

- Apply the different purposes to strategic vs. tactical PR
- Design a PR strategy
- Develop strong relationships with reporters and journalists
- Take your communication skills to a higher level

## Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session 2: Public Relations
  - Introduction
  - Pre-Assignment Review
  - What Public Relations Is All About
  - Fragmentation
  - Saturation
  - Reputation
  - What it Means to Get Strategic
3. Session 3: Building Your PR Plan
  - Defining Reality
  - Checklist for Success
  - The Five Phases
  - Defining the Goal
  - Functions of PR
  - Defining the Goal
  - Key Supporters
  - Selecting Your Strategy and Tactics
  - Defining Strategy
  - Defining Tactics
  - The Plan
  - The Eight Phases
4. Session 4: Structuring Messages
  - Getting Down to Business
  - Wisdom Work
  - Creating Your Media Image
  - Making Connections
  - Summary
  - Getting Clear on Your Message
  - Making Connections
  - Media Kits
  - Components of a Media Kit
  - Sample Media Kit: Award Ceremony
  - Sample Media Kit: Crisis Situation
  - Sample Media Kit: Logo Redesign
  - Attention to Style
  - Creating Strong, Positive Messages
  - The MEDIA Model
5. Session 5: Establishing Media Guidelines
  - Defining Guidelines
  - Two Groups are Better Than One
  - Selecting a Spokesperson
  - Select Great Communicators
  - Approval Process
6. Session 6: Managing the Media
  - Building Rapport with Reporters
  - Tough Questions

- Speaking in Sound Bites
- The SIM Model
- Timing is Everything!
- Sample Sound Bites
- Getting Creative
- Options When You Have 'No Comment'
- Summary
- 7. Session 7: The Press Release
  - Before You Start
  - Other Options
  - The Basics
  - Give it a Shot
- 8. Session 8: PR and the Crisis
  - Business Continuity and Recovery
  - Setting Priorities
  - Essential Crisis Plan Elements
- Exercising Options
- Press Release
- Reviewing and Revising
- 9. Session 9: Social Media and Public Relations
  - Where It Is
  - Making Connections
  - Monitoring Tips and Tricks
  - Making Connections
- 10. Session 10: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 11. Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

## Public Speaking: Presentation Survival School

### Course Overview

This course will teach you how to manage your thoughts, body language, nervousness, and speech patterns to present yourself professionally. You'll also learn how to present at meetings, use the five-S pattern to prepare a good presentation, and punch up your presentation with visual aids.

### Learning Objectives

- Establish rapport with your audience
- Implement techniques to reduce nervousness and fear
- Understand your strengths as a presenter and how to appeal to different types of people
- Recognize how visual aids can create impact and attention
- Develop techniques to create a professional presence
- Learn some different ways to prepare and organize information
- Prepare, practice, and deliver a short presentation

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview           | 5. Session Five: Positive Self-Talk         |
| Learning Objectives                       | Our Thoughts                                |
| Pre-Assignment                            | The Steps to Feeling Good                   |
| Pre-Course Assessment                     | Thinking Positively                         |
| 2. Session Two: Communication             | 6. Session Six: Rapport                     |
| About Communication                       | Building Rapport                            |
| Simple Conversations                      | Making Connections: Self-Disclosure         |
| 3. Session Three: Stop! Check Your Mouth! | Creating an Introduction                    |
| Speaking Characteristics                  | 7. Session Seven: Maximizing Meetings       |
| Gender References Exercise                | Four Areas of Opportunity                   |
| Acronyms and Jargon                       | Fifteen Ways to Master a Meeting            |
| Tact                                      | Mastering Your Meeting Exercise             |
| Five Good Rules                           | Learning Names                              |
| 4. Session Four: What Is Your Type? How   | 8. Session Eight: Body Language             |
| About Mine?                               | Body Language Signals                       |
| The Assessment                            | 9. Session Nine: Sticky Situations          |
| Identifying Your Characteristics and      | Are You Comfortable?                        |
| Preferences                               | Dealing with Tough Situations               |
| Questionnaire                             | Dressing Up                                 |
| What Does it Mean to Have a Number?       | 10. Session Ten: I Can Just Send an E-mail, |
| What Is Important?                        | Right?                                      |
| People That Are Most Like Me              | Advantages of an Oral Presentation          |
| People That Are Least Like Me             | Oratory Exercise                            |

- Oratory Exercise: Practice Paragraph
- 11. Session Eleven: Overcoming Nervousness
  - About Nervousness
  - Nervousness Can Have Many Sources
  - Putting Yourself in Control
  - Mastering Non-verbal Communication
- 12. Session Twelve: The Five S's
  - Five Points for Any Presentation
  - Framework Example
  - Preparing with the Five-S Pattern
- 13. Session Thirteen: Start Writing!
  - Evidence
  - Introductions
  - Following the Opening Statement
  - Exercise: Beginning a Presentation
  - Transitioning to the Body
  - Example of a Transition in a Presentation
  - Enhancing Your Presentation with Stories, Numbers, and Examples
  - Endings
  - Making Connections: Think Fast!
  - Your Fast Thinking Presentation
- 14. Session Fourteen: Audience Profile
  - Preparing an Audience Profile
  - Making Connections: Your Next Presentation
- 15. Session Fifteen: Your Speaking Voice
  - Parts of Your Message
  - Vocal Variety
  - Paying Attention to Your Voice
  - Mastering Your Material
- 16. Session Sixteen: Add Punch to Your Presentation
  - The Power of Threes
  - Well Known Tripling Examples
  - Visual Aids
  - Tips for Using Visual Aids
  - More Tips for Using Visual Aids
  - Analyzing Visual Aids
  - Adding Punch Summary
  - Lessons Learned
- 17. Session Seventeen: Your Presentation
  - Preparation
  - Introduction
  - Body
  - Conclusion
  - Presentation
- 18. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 19. Course Summary
- 20. Recommended Reading List
- 21. Post-Course Assessment

## Public Speaking: Speaking Under Pressure

### Course Overview

This course has been designed for those in positions where they must speak in front of audiences that are hostile or demanding. This material is also suitable for those who are relatively new speakers who want some encouragement to speak up in meetings or who want some training before they begin making presentations on behalf of the organization. Speaking under pressure, or thinking on your feet, means being able to quickly organize your thoughts and ideas, and then being able to convey them meaningfully to your audience to modify their attitudes or behavior. It applies to formal speeches as well as everyday business situations.

It requires presence of mind, goal orientation, adaptation, and judgment. It also requires differentiating between oral and written communications.

This course is aimed at improving your skills and learning some new techniques that will give you the persuasive edge when you are making a presentation, fielding difficult questions, or presenting complex information.

### Learning Objectives

- Apply quick and easy preparation methods that will work whether you have one minute or one week to prepare.
- Prepare for questions, even before you know what those questions will be.
- Overcome nervousness that you may have when speaking in front of a group, particularly if the group is not sympathetic to what you have to say.
- Use presentation techniques that establish your credibility and get people on your side.

### Course Outline

- |                                       |  |
|---------------------------------------|--|
| 1. Session One: Course Overview       | What is Force Field Analysis?                |
| Learning Objectives                   | Exercise                                     |
| Pre-Assignment                        | Pros and Cons                                |
| Pre-Course Assessment                 | Pros and Cons Activity                       |
| 2. Session Two: Getting Started       | 5. Session Five: Understanding Your Audience |
| What is Speaking Under Pressure?      | Audience                                     |
| Presentation Preparation              | Understanding Your Audience, Part One        |
| Evaluations                           | Audience Profiles                            |
| 3. Session Three: Planning            | Aim, Plan, and Convey                        |
| Preparing to Plan                     | Understanding Your Audience, Part Two        |
| What Can You Do for Better Planning?  | Finding Common Ground                        |
| Presentation Preparation              | Practical Application                        |
| Evaluations                           |  |
| 4. Session Four: Force Field Analysis |  |



6. Session Six: Controlling Your Jitters
  - Overcoming Nervousness
  - Sequencing Ideas
  - Presentation
7. Session Seven: Making Your Listener Hear You
  - Making Your Listener Hear You
  - Getting Your Message Across
8. Session Eight: Key Themes
  - About Key Themes
  - Practical Application
  - Key Sentences
9. Session Nine: Key Sentences
  - Preparation
  - Presentation
10. Session Ten: Structuring Ideas
  - Three Key Points
  - Why Three Key Points?
  - Aim
  - Concentrate
  - Adapt
  - Depth, Move Forward, Ease
  - Building a Three-Part Plan
  - Practical Application
11. Session Eleven: Organization Methods
  - Using Time, Place, and Aspect
  - Here are the Steps to Organizing Your Information.
12. Session Twelve: Interacting with the Audience
  - Preparation
  - Presentation
  - Two Additional Plans
13. Session Thirteen: Practice Makes Perfect
  - How the Listener Takes Control
  - The Meaning Behind Our Message
  - Qualities of a Good Voice
  - If the Audience Turns on You
14. Session Fourteen: Beginnings and Endings
  - Two-Minute Talk
15. Session Fifteen: Expanding Your Presentation
  - Beginnings and Endings
  - Expanding Your Presentation
16. Session Sixteen: Presentations
  - Preparation
  - Evaluations
17. Personal Action Plan
18. Course Summary
19. Recommended Reading List
20. Post-Course Assessment

# Purchasing and Procurement Basics

## Course Overview

Purchasing and procurement functions are about much more than bringing goods and services into an organization. They are the foundation of strong, collaborative relationships with suppliers. Since many companies source products from around the globe more frequently than ever, a procurement manager needs strong capabilities. These skills cannot just be learned on the job: they need to be taught. As well, the value of procurement is now recognized as an integral part of cost control within the organization. In this course, you'll learn the basics of procurement, including what a supply chain looks like, the purchasing cycle, essential tools and strategies for making the best purchasing relationships work, managing bids, and more.

## Learning Objectives

- Describe what a supply chain is
- Describe your procurement department's role within the organization
- Understand the principles of the purchasing cycle
- Apply the steps needed for managing a competitive bid process, from the request for proposals or qualifications through to negotiating the contract
- Know what it takes to set up a competitive bid for a contract
- Defend your position on why a particular supplier should be selected based on an evaluation strategy
- Be responsible for managing supplier performance, including controlling quality and setting and monitoring standards
- Apply the tools of the procurement trade, from PC-based applications to cloud-based solutions

## Course Outline

- |                                       |                                    |
|---------------------------------------|------------------------------------|
| 1. Session 1: Course Overview         | Reducing Time to Market            |
| Learning Objectives                   | Practice Makes Perfect             |
| Pre-Assignment: Introduction          | Pre-Assignment Review              |
| Pre-Assignment: Questions             | The Five Rights of Purchasing      |
| Pre-Course Assessment                 | 3. Session 3: The Purchasing Cycle |
| 2. Session 2: Supply Chain Management | Cycle Overview                     |
| Basics                                | Additional Points to Consider      |
| Defining the Terms                    | Identifying a Need                 |
| Process Areas                         | The Purchase Requisition           |
| Summary                               | Material Requirements Planning     |
| Making Connections                    | Schedule                           |
| The Value of Procurement              | Developing a System                |
| The Importance of Procurement         | Making Connections                 |

- Researching Your Options
- Issuing the Purchase Order
- Issuing a Change Order
- Invoice Auditing
- Lessons Learned
- 4. Session 4: Purchasing Toolkit
  - Analyzing the Price
  - General Economic Issues
  - About Oligopolies
  - More About Oligopolies
  - Variable-Margin Pricing
  - Six Categories of Cost
  - Analyzing Costs
  - The Scope of Costs
  - Sources for Cost Data
  - Additional Costs
  - Evaluating Suppliers
  - Evaluation Checklist
  - Supplier Surveys
  - Additional Tools
  - Negotiation Basics
  - Key Negotiation Techniques
  - Effective Questions
  - Collaboration Techniques
  - The Learning Curve
- 5. Session 5: Managing Competitive Bids
  - Purchasing Through RFP's and Tenders
  - Bidding vs. Negotiation
  - Prerequisites
  - Making a Choice
  - Elements of the Analysis
  - Creating a Contract
  - Key Elements
  - Ethical Considerations
  - Conflicts of Interest
  - The Importance of Ethics
  - Ethical Standards
  - Ethical Dilemmas
  - Case Studies
- 6. Session 6: Improving Efficiency and Accuracy
  - Managing Supplier Performance
- Aggregate Evaluations
- Categorical Evaluations
- Weighted Evaluations
- Controlling Quality
- Taking Corrective Action
- Setting and Monitoring Delivery Standards
- Shipment Tracking
- Is the Contract Breached?
- Expediting Orders
- Creating Good Working Relationships
- Monitoring Supplier Performance
- Developing Performance Improvements
- 7. Session 7: Analyzing and Reducing Risk in the Supply Chain
  - Whose Risk Is It Anyway?
  - Applying the Concepts
  - The Digital Marketplace
  - Agile Procurement
  - Case Study
  - Using Multiple Suppliers
  - Building Agility
  - Case Study
  - A Risk Management Focus
  - Sample Plan
  - Best Practices
- 8. Session 8: Managing Internal Relationships
  - Procurement's Role in the Organization
  - Where Does Supply Management Fit?
  - Spell It Out
  - Making Your Mark
  - The Evolution of Materials Management
  - The Role of the Purchasing Specialist
  - Cross-Functional Teams
  - Challenges with Cross-Functional Teams
- 9. Session 9: Tools of the Trade
  - Digital Systems
  - Debit, Credit, and Virtual Terminals
  - Supplier Stores
  - Supplier Delivery System
  - Electronic Data Interchange (EDI)

E-Commerce  
The Always-On Marketplace  
E-Sourcing  
The Role of Social Networking  
Tools of the Trade  
Seeking Feedback  
Annual Report Checklist  
Annual Report Tips

Drawing Conclusions  
10. A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
11. Course Summary  
12. Recommended Reading List  
13. Post-Course Assessment

## Regulations and Standards for Food Safety

### *Course Overview*

This course reviews the food safety standards for food establishments and the government organizations that create and enforce these standards.

### *Learning Objectives*

- Recognize major federal agencies involved in food safety.
- Understand how local agencies, especially health departments, assist food establishments with food safety.
- Become familiar with the FDA Food Code.
- Know the general process for health department inspections.
- Understand the importance of self-inspections for food safety.

### *Course Outline*

- |   |                                       |
|---|---------------------------------------|
| 1. Session One: Course Overview         | Pre-Assignment Review: Looking at the |
| Learning Objectives                     | FDA Food Code                         |
| Pre-Assignment                          | 3. Session Three: Inspections         |
| Pre-Course Assessment                   | Process                               |
| 2. Session Two: Government Agencies and | Self-Inspections                      |
| Standards                               | Reviewing a Self-Inspection Checklist |
| Federal Agencies                        | 4. Personal Action Plan               |
| Local Agencies                          | 5. Course Summary                     |
| Finding Your Local Health Department    | 6. Recommended Reading List           |
| The FDA Food Code                       | 7. Post-Course Assessment             |

## Research Skills

### Course Overview

In this age of information overload, it can be hard to know where to find good information that you can trust. If you are doing research for an important project, report, or proposal, how do you find information that you can count on?

### Learning Objectives

- Identify the benefits of proper research and documentation
- Read for maximum information retention and recall
- Take effective notes
- Plan a research strategy
- Identify and use various types of research sources
- Create preliminary and final outlines
- Know how to use style guides and be able to identify the most common styles
- Document and attribute your work to ensure you do not plagiarize

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                    | Writing a Draft Outline                                   |
| Learning Objectives                                | 5. Session Five: Where to Look and What to Look For       |
| Pre-Assignment                                     | Primary vs. Secondary Sources                             |
| Pre-Course Assessment                              | Analyzing Sources   |
| 2. Session Two: Why Are Research Skills Important? | 6. Session Six: Finding Information the Old-Fashioned Way |
| Why are Research Skills Important?                 | Useful Resources  |
| 3. Session Three: Basic Skills                     | Understanding the Dewey Decimal System                    |
| Reading and Note-Taking Techniques                 | 7. Session Seven: Researching with the Internet           |
| Get Organized                                      | Finding the Good Stuff                                    |
| Preview  | Preferred Sites   |
| Ask  | Analyzing Sources   |
| Read   | Mind Mapping  |
| Summarize  | 8. Session Eight: Getting Ready to Write                  |
| Evaluate   | Getting Ready to Write                                    |
| PARSE in Action                                    | 9. Session Nine: Putting Pen to Paper                     |
| Improving Your Recall                              | Writing Basics  |
| Key Tips   | Documentation Styles                                      |
| 4. Session Four: Planning Your Research Strategy   | Citing Sources  |
| A Research Model                                   | Entry Components  |
| Identifying a Focal Point                          | Putting it Into Practice                                  |
| A One-Minute Pitch                                 |   |
| Getting Focused                                    |   |

10. Personal Action Plan  
11. Course Summary

12. Recommended Reading List  
13. Post-Course Assessment

# Respect in the Workplace

## Course Overview

Research in North America suggests that more than 1 in 3 employees have experienced bullying, abuse, harassment, or discrimination in their workplaces. Fostering respect in the workplace invites a safer, more productive quality of life at work and in our public and personal spaces as well.

## Learning Objectives

- Define and deal with bullying, abuse, harassment and discrimination
- Identify and address unconscious bias
- Identify power dynamics in the workplace
- Be empowered as a bystander to take effective action
- Understand and manage common emotions in the workplace
- Understand mental health outcomes of prolonged or unaddressed disrespectful behavior
- Foster respect in your workplace

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                       | Assimilation, Accommodation and Mitigation |
| Learning Objectives                                   | Recognizing Bias                           |
| Pre-Assignment  |  |
| Pre-Course Assessment                                 | 4. Session Four: Workplace Dynamics        |
| 2. Session Two: The Power of Respect                  | Power Dynamics                             |
| Framing our Experience                                | Types of Power in the Workplace            |
| Making Connections                                    | Inviting and Building Healthy Dynamics     |
| Definitions and Responsibilities: Respect             | Encouraging Healthier Dynamics             |
| Definitions and Responsibilities: Bias                | 5. Session Five: Managing Emotions         |
| Definitions and Responsibilities: Discrimination      | Identifying Emotional Experience           |
| Definitions and Responsibilities: Harassment          | Emotional Scenarios                        |
| Definitions and Responsibilities: Harassment          | Managing Difficult Emotions                |
| Definitions and Responsibilities: Bullying            | Case Studies                               |
| Pre-Assignment Review                                 | 6. Session Six: Empowering the Bystander   |
| Identifying Offensive Behaviors                       | Anatomy of a Bystander                     |
| 3. Session Three: Unconscious Bias                    | When to Act                                |
| Our Brains and Bias                                   | Taking Action                              |
| Where Does This Fit Into Our Discussion of Diversity? | What Do I Say?                             |
| Predispositions                                       | The Four D's of Action                     |
|   | 7. Session Seven: Fostering Respect        |
|   | Showing and Sharing Respect                |
|   | Brainstorming                              |



Creating a Diverse Workplace:  
Cornerstones  
Creating a Diverse Workplace: Knowledge  
Creating a Diverse Workplace:  
Understanding  
Creating a Diverse Workplace: Acceptance  
& Behavior  
Showing Acceptance  
Role Play: Dealing with Disrespectful  
Behavior  
Role Play: Scenario Two

Role Play: Scenario Three  
Role Play: Scenario Four  
Role Play: Scenario Five  
Role Play: Scenario Six  
8. Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
9. Course Summary  
10. Recommended Reading List  
11. Post-Course Assessment

# Risk Management

## Course Overview

Risk management has long been a key part of project management and it has also become an increasingly important part of organizational best practices. Corporations have realized that effective risk management can not only reduce the negative impact of crises; it can provide real benefits and cost savings. The risk management framework provided in this course is flexible enough for any organization. You can apply it to a single project, a department, or use it as a basis for an enterprise-wide risk management program.

## Learning Objectives

- Define risk and risk management
- Describe the COSO ERM cube and ISO 31000
- Establish a risk management context
- Describe the 7 R's and 4 T's that form the framework of risk management activities
- Design and complete a basic risk assessment
- Determine the appropriate response to risks and create a plan for those responses
- Describe the key components of reporting, monitoring, and evaluation of a risk management program

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview            | General Motors                             |
| Learning Objectives                      | Task One                                   |
| Pre-Assignment                           | Task Two                                   |
| Pre-Course Assessment                    |  |
| 2. Session 2: Understanding Risk         | 5. Session 5: Responding to Risks          |
| Pre-Assignment Review                    | Risk Responses                             |
| Defining Risk and Risk Management        | Key Considerations                         |
| Types of Risks                           | Case Study: General Motors (Part Two)      |
| Examples of Risk                         | 6. Session 6: Resourcing Controls          |
| What is Risk Management?                 | Identifying and Evaluating Controls        |
| Establishing Your Risk Management        | Case Study: General Motors (Part Three)    |
| Context                                  | 7. Session 7: Reaction Planning            |
| Key Models                               | The Worst-Case Scenario                    |
| ISO 31000 Standard and Guide 73          | Case Study: General Motors (Part Four)     |
| 3. Session 3: Risk Management Activities | 8. Session 8: Reporting and Monitoring     |
| The Seven R's And Four T's               | The Reporting Structure                    |
| 4. Session 4: Assessing Risk             | Reporting and Monitoring Framework         |
| A Risk Assessment Process                | Reporting Checklist                        |
| Sample Template                          | Monitoring Checklist                       |
| Identifying Risks                        | 9. Session 9: Reviewing and Evaluating the |
| Evaluation Method                        | Framework                                  |
|  | A Review Checklist                         |

Scaling the Program  
Back at Work  
10. Session 10: A Personal Action Plan  
Starting Point

Where I Want to Go  
How I Will Get There  
11. Summary  
12. Recommended Reading List  
13. Post-Course Assessment

## Safe Facilities and Equipment

### Course Overview

This course reviews how to design a facility to minimize food hazards, including choosing safe materials and equipment.

### Learning Objectives

- Understand why facility design impacts food safety.
- Apply design principles to design a facility's layout.
- Know what materials are recommended for flooring, walls, and ceilings.
- Understand requirements for specific areas of a facility, including restrooms and storage areas.
- Select equipment appropriate for a food service facility.
- Understand requirements for different types of equipment, including prohibited materials.
- Know the basics for maintaining utility systems.

### Course Outline

- |                                 |                                      |
|---------------------------------|--------------------------------------|
| 1. Session One: Course Overview | Pre-Assignment Review                |
| Learning Objectives             | Flooring Materials                   |
| Pre-Assignment                  | Wall and Ceiling Material            |
| Pre-Course Assessment           | Other Areas                          |
| 2. Session Two: Facility Design | 3. Session Three: Equipment Care     |
| Layout and Materials            | Equipment Selection and Installation |
| Design                          | Utilities                            |
| "Zone" Approach                 | 4. Personal Action Plan              |
| "Assembly Line" Approach        | 5. Course Summary                    |
| Adapting Design                 | 6. Recommended Reading List          |
|                                 | 7. Post-Course Assessment            |

## Safe Food Handling

### Course Overview

This course reviews personal hygiene guidelines for food safety, including handwashing and glove usage. It also reviews worker health policies and how workers can handle food safely.

### Learning Objectives

- Identify how workers contaminate food
- Wash hands correctly
- Identify when to wash hands
- Use single-use gloves
- Know when to change gloves
- Wear correct work attire
- Eat, drink, and smoke in ways that keep food safe
- Identify symptoms and illnesses to report
- Know what to do when feeling sick

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview          | When to Change Gloves                                 |
| Learning Objectives                      |   |
| Pre-Assignment                           | 3. Session Three: Personal Hygiene Practices          |
| Pre-Course Assessment                    | Work Attire and Practices                             |
| 2. Session Two: Hand Hygiene Practices   | Hair Restraints                                       |
| How Workers can Contaminate Food         | Clean Clothing  |
| Handwashing                              | Aprons  |
| Where to Wash Hands                      | Jewelry   |
| How to Wash Hands                        | Eating, Drinking, Smoking, and Chewing Gum or Tobacco |
| Seeing Handwashing in Action             | Illness Symptoms and Diagnosis                        |
| When to Wash Hands                       | Reportable Illnesses                                  |
| When to Wash Hands Scenarios             | Restriction and Exclusion                             |
| Seeing Handwashing in Action             | Restrict/Exclude Scenarios                            |
| Hand Care                                | 4. Personal Action Plan                               |
| Bare Hand Contact with Ready-To-Eat Food | 5. Course Summary                                     |
| Single-Use Gloves                        | 6. Recommended Reading List                           |
| How to Put on and Remove Gloves          | 7. Post-Course Assessment                             |

## Safe Preparation of Food

### Course Overview

This course reviews how to prepare food safely. This includes thawing, cooking, cooling, and reheating.

### Learning Objectives

- Understand general and specific preparation practices.
- Recognize TCS and ready-to-eat foods.
- Know the correct methods to thaw foods.
- Identify the minimum internal cooking temperatures for TCS foods.
- Identify methods and requirements for cooling TCS foods.
- Understand requirements to reheating foods for immediate service or hot holding.
- Know requirements for hot holding with and without temperature control.

### Course Outline

- |                                       |   |
|---------------------------------------|---|
| 1. Session One: Course Overview       | Pre-Assignment Review                   |
| Learning Objectives                   | Cooking Review                          |
| Pre-Assignment                        | Other Cooking Guidelines                |
| Pre-Course Assessment                 | 3. Session Three: Cooling and Reheating |
| 2. Session Two: Preparing and Cooking | Cooling                                 |
| Preparation Guidelines                | Cooling Methods                         |
| High Risk Food                        | Cooling Food Exercise                   |
| High Risk Populations                 | Reheating                               |
| Specific Preparation Guidelines       | Hot Holding                             |
| Thawing                               | Holding without Temperature             |
| Thawing Overview                      | Control                                 |
| Refrigeration                         | Temperature Review                      |
| Running Water                         | 4. Personal Action Plan                 |
| Microwave                             | 5. Course Summary                       |
| Cooking Process                       | 6. Recommended Reading List             |
| Cooking                               | 7. Post-Course Assessment               |

## Safe Purchasing and Receiving Practices

### Course Overview

This course reviews how to purchase and receive food safely. These practices will keep food safe from contamination.

### Learning Objectives

- Identify approved suppliers.
- Communicate with suppliers.
- Understand worker responsibilities while receiving incoming shipments.
- Inspect incoming food for signs of temperature abuse or other contamination.
- Identify when to reject food shipments.
- Understand how to store food safely.

### Course Outline

- |                                  |                                 |
|----------------------------------|---------------------------------|
| 1. Session One: Course Overview  | Inspection Guidelines           |
| Learning Objectives              | Temperature Requirements        |
| Pre-Assignment                   | Packaging                       |
| Pre-Course Assessment            | Reviewing Inspection Guidelines |
| 2. Session Two: Purchasing Food  | Documentation                   |
| Suppliers                        | Quality                         |
| Working with a New Supplier      | Accept or Reject?               |
| New Supplier Role-Play           | Storage Practices               |
| Communication is Key!            | Reviewing Storage Practices     |
| Pre-Assignment Review            | 4. Personal Action Plan         |
| 3. Session Three: Receiving Food | 5. Course Summary               |
| Receiving Process                | 6. Recommended Reading List     |
|                                  | 7. Post-Course Assessment       |

## Safe Storage of Food

### Course Overview

This course reviews how to store food safely. This includes storage location, date marking, and rotating food.

### Learning Objectives

- Understand how to label food correctly.
- Know how to properly date mark food.
- Know how to use the first-in, first-out method.
- Identify practices to prevent cross-contamination during storage.
- Understand general and specific guidelines for storing different foods.

### Course Outline

- |                                   |                                      |
|-----------------------------------|--------------------------------------|
| 1. Session One: Course Overview   | Date Marking Practice                |
| Learning Objectives               |                                      |
| Pre-Assignment                    | 3. Session Three: Storage Guidelines |
| Pre-Course Assessment             | Preventing Cross-Contamination       |
| 2. Session Two: Labeling and Date | Storage Location                     |
| Marking                           | Storage Containers                   |
| Labeling                          | Cleaning                             |
| Food Used On-Site                 | Storage Guidelines Review            |
| Food Packaged for Retail Sale     | Specific Storage Guidelines          |
| Real Life Examples of Labeling    | Pre-Assignment Review                |
| Package Labels                    | 4. Personal Action Plan              |
| Date Marking                      | 5. Course Summary                    |
| Rotation                          | 6. Recommended Reading List          |
|                                   | 7. Post-Course Assessment            |



# Safety in the Workplace

## Course Overview

Workplace accidents and injuries cost corporations millions of dollars and thousands of hours lost every year. They also have a profound, often lifelong impact on workers.

## Learning Objectives

- Understand the difference between a safety program and a safety culture
- Use resources to help you understand the regulations in your area
- Launch a safety committee
- Identify hazards and reduce them
- Apply hiring measures that can improve safety
- Explain what a safety training program will involve
- Identify groups particularly at risk for injury and know how to protect them
- Help your organization write, implement, and review a safety plan
- Respond to incidents and near misses
- Understand the basics of accident investigation and documentation

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview                   | The Three Methods                             |
| Learning Objectives                               | Hazard Resolution for the Acme Widget Company |
| Pre-Assignment                                    |   |
| Pre-Course Assessment                             | 7. Session Seven: Taking Proactive Measures   |
| 2. Session Two: Defining a Safety Culture         | Hiring for Safety                             |
| Defining a Safety Culture                         | Safety Training                               |
| A Safety Culture                                  | A Word about Adult Learning                   |
| How Does Safety Apply to Me?                      | Alternatives to Training                      |
| 3. Session Three: Governing Bodies and Resources  | 8. Session Eight: Identifying Groups at Risk  |
| Gathering Resources                               | Identifying Groups at Risk                    |
| Governing Agencies                                | 9. Session Nine: Writing a Safety Plan        |
| Other Resources                                   | Elements of the Plan                          |
| 4. Session Four: Getting Started                  | Additional Tips                               |
| Creating a Safety Committee                       | 10. Session Ten: Implementing the Plan        |
| The Safety Committee's First Meeting              | Implementing the Plan: Getting Started        |
| 5. Session Five: Identifying Hazards              | Implementing the Plan: Empowering Employees   |
| The Hazard Identification Process                 | Challenges and Solutions                      |
| Common Hazards                                    | 11. Session Eleven: Incident Management       |
| Reviewing Hazards                                 | Case Study                                    |
| Hazard Identification for the Acme Widget Company | Responding to Incidents                       |
| 6. Session Six: Resolving Hazards                 | Documenting Incidents                         |
|   | Investigating Incidents                       |

The Safety Investigation Process  
Near Misses  
12. Session Twelve: Reviewing the Program  
Review Process  
13. Personal Action Plan

Starting Point  
Where I Want to Go  
How I Will Get There  
14. Course Summary  
15. Recommended Reading List  
16. Post-Course Assessment

# Self-Leadership

## Course Overview

Self-leadership includes taking responsibility for one's outcomes, setting direction for one's life, and having tools to manage priorities. Self-leaders work at all levels of an organization: They are front-line workers, middle managers, and CEOs. Self-leaders such as Walt Disney and Wayne Gretzky worked hard to achieve their dreams without using the term self-leadership. However, they have clearly demonstrated that being in control of their behavior and results, focus, practice, and learning were necessary to achieve their goals.

Self-leadership requires a commitment from individuals to decide what they want from life and to do what is necessary to get the results they want. This course will help you internalize the four pillars of self-leadership and to make meaningful, empowered choices while taking action to get where you want to go.

## Learning Objectives

- Define self-leadership and what it means on an individual level
- Assume responsibility for your results by understanding who you are, what you want, and how to reach your goals
- Describe the four pillars of self-leadership
- Use techniques related to adjusting to change, cultivating optimism, and developing good habits to build your self-leadership

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview          | Lifelong Learning                        |
| Learning Objectives                      | Making Connections                       |
| Pre-Assignment                           | 6. Session Six: Motivation for Optimists |
| Pre-Course Assessment                    | Motivation from Within                   |
| 2. Session Two: What is Self-Leadership  | Creating a Motivational Climate          |
| Defining Self-Leadership                 | The Value of Optimism                    |
| Four Pillars of Self-Leadership          | ABC's of Optimism                        |
| 3. Session Three: Knowing Oneself        | Pessimism vs. Optimism                   |
| Creating a Personal Vision Statement     | Adversities                              |
| Identifying Dreams and Setting Goals     | 7. Session Seven: Using What Someone     |
| Getting Goals on Paper                   | Knows                                    |
| Setting Up For Success                   | Emotional Intelligence                   |
| 4. Session Four: Change Management       | 8. A Personal Action Plan                |
| Control and Change                       | 9. Summary                               |
| 5. Session Five: Thinking About Behavior | 10. Recommended Reading List             |
| One's Behavior                           | 11. Post-Course Assessment               |
| Self-Reflection Exercise                 |  |



## Self-Management and Productivity

### Course Overview

Strong self-management skills and productivity enable individuals to effectively prioritize tasks, regulate emotions, and manage their time. This course will help students take control of their time and energy to achieve their professional goals. They will learn the basics of self-management, explore the science of habits and routines, and discover techniques to boost their productivity. Through hands-on activities and reflection, participants will identify challenges, build better habits, and create a plan for long-term success..

### Learning Objectives

- Understand the core principles of self-management and productivity.
- Apply practical techniques for enhancing self-management skills and productivity, including goal setting and task prioritization methods.
- Manage time and energy efficiently to meet goals and complete tasks.
- Leverage tools and technology to boost productivity.
- Use emotional regulation and stress management methods to improve well-being and performance.
- Develop a plan for strengthening self-management skills and productivity.

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview             | Leveraging Productivity Applications      |
| Learning Objectives                         | 6. Session Six: Applying Emotional        |
| Pre-Assignment                              | Regulation Techniques                     |
| Pre-Course Assessment                       | Why It Matters                            |
| 2. Session Two: Foundations of              | Mindfulness and Stress Management         |
| Self-Management and Productivity            | 7. Session Seven: Building Accountability |
| Understanding Self-Management               | Systems                                   |
| The Science of Productivity                 | Staying Accountable                       |
| 3. Session Three: Improving Productivity    | 8. Session Eight: Planning for Long-Term  |
| Identifying Productivity Barriers           | Productivity                              |
| Goal Setting and Prioritization             | Creating an Action Plan                   |
| Techniques                                  | 9. Personal Action Plan                   |
| Time Management Strategies                  | 10. Course Summary                        |
| 4. Session Four: Overcoming                 | 11. Recommended Reading List              |
| Procrastination                             | 12. Post-Course Assessment                |
| Addressing Procrastination                  |   |
| 5. Session Five: Using Tools and technology |   |

## Selling Smarter

### Course Overview

It is no secret that the sales industry continues to change and evolve rapidly. This is an exciting and dynamic profession, although it is often underrated and misunderstood. The backslapping, high pressure, joke-telling salesperson has disappeared. In their place is a new generation of sales professionals: highly trained with the characteristics of honesty, trustworthiness, and competence.

Today's top salespeople are in the business of identifying needs and persuading potential customers to respond favorably to an idea that will result in mutual satisfaction for both the buyer and the seller. They do this in a way which puts the customer first, fully knowing that when they meet the customers' needs, sales will follow.

### Learning Objectives

- Explain and apply concepts of customer focused selling
- Use goal-setting techniques as a way to focus on objectives and develop strategies for accomplishing them
- Understand productivity techniques and adopt them to optimize time usage
- Identify ways to find new clients and network effectively

### Course Outline

- |  |                                      |
|--|--------------------------------------|
| 1. Session One: Course Overview        | The Path to Efficiency               |
| Learning Objectives                    | 7. Session Seven: Customer Service   |
| Pre-Assignment                         | Customer Service                     |
| Pre-Course Assessment                  | 8. Session Eight: Selling More       |
| 2. Session Two: Selling Skills         | Enhancing Sales                      |
| Essential Skills                       | Values                               |
| Consultative Selling                   | Making Connections                   |
| 3. Session Three: The Sales Cycle      | 9. Session Nine: Major Mistakes      |
| The Sales Cycle                        | The Ten Mistakes                     |
| Initiate                               | 10. Session Ten: Finding New Clients |
| Build                                  | Finding New Clients                  |
| Manage                                 | Networking                           |
| Optimize                               | 11. Session Eleven: Selling Price    |
| 4. Session Four: Framing Success       | Selling Price                        |
| The Power of the Mind                  | 12. Personal Action Plan             |
| Optimism                               | 13. Course Summary                   |
| 5. Session Five: Setting Goals         | 14. Recommended Reading List         |
| Setting Good Goals                     | 15. Post-Course Assessment           |
| 6. Session Six: The Path to Efficiency |                                      |

## Serving Food Safely

### Course Overview

This course covers how to keep food safe during service. This includes holding, self-service operations, off-site service, and general guidelines for serving food.

### Learning Objectives

- Hold time/temperature for safety (TCS) food at correct temperatures.
- Understand how to keep food safe during temperature holding.
- Keep food safe from contamination by customers during self-service operations.
- Keep food safe during off-site service, including delivery, catering, and mobile kitchens.
- Understand serving guidelines for service and kitchen staff.

### Course Outline

- |                                     |                                       |
|-------------------------------------|---------------------------------------|
| 1. Session One: Course Overview     | Catering Guidelines                   |
| Learning Objectives                 | Mobile/Temporary Kitchens and Vending |
| Pre-Assignment                      | Machines                              |
| Pre-Course Assessment               | Food Holding Scenarios                |
| 2. Session Two: Holding Food        | 3. Session Three: Serving Food        |
| Food Holding Guidelines             | Guidelines for Serving Staff          |
| Holding Without Temperature Control | Waiter/Waitress Practice              |
| Self-Service                        | Guidelines for Kitchen Staff          |
| Bulk Food                           | 4. Personal Action Plan               |
| Off-Site Service                    | 5. Course Summary                     |
| Delivery and Catering               | 6. Recommended Reading List           |
|                                     | 7. Post-Course Assessment             |

## Six Sigma: Entering the Dojo

### Course Overview

Six Sigma is a set of qualitative and quantitative quality tools that can help a business improve their processes. The efficiency built into the business processes brings about improved profits, confidence and quality. Ultimately this effort is there to ensure customer satisfaction.

The term Six Sigma comes from statistics to indicate that the process outputs fall within three standard deviations from the center (expected value) giving a range of six standard deviations (or 6 sigma-  $6\sigma$ ). As a result in terms of individual outputs it means you would have 3.4 defects per million items.

This course is designed to introduce students to basic concepts of Six Sigma particularly in continuous process improvement. Various quality tools used in process improvements will be explored as well as the importance of customer relationships. Courses in Lean, quality and teams will provide knowledge on the other aspects of how Six Sigma works. It is a predecessor to studies in Six Sigma Yellow, Green and Black Belt.

### Learning Objectives

- Understand the Basics of Six Sigma.
- Describe the seven quality tools to solve process problems.
- Describe the various quality management tools.
- Describe incremental and breakthrough improvements and understand the methodologies of continuous improvement projects.
- Describe the importance of customer relationships in a quality organization

### Course Outline

- |                                 |   |
|---------------------------------|---|
| 1. Session 1: Course Overview   | 4. Session 4: Management Tools for Generating |
| Learning Objectives             | Ideas   |
| Pre-Assignment                  | Brainstorming and Affinity Diagrams           |
| Pre-Course Assessment           | Making Connections                            |
| 2. Session 2: Six Sigma Basics  | Other Idea Generating Techniques              |
| Introduction                    | 5. Session 5: Continuous Improvement          |
| DMAIC and DMADV?                | Continuous Improvement                        |
| 3. Session 3: Improvement Tools | How to Carry Out a Six Sigma Continuous       |
| Check Sheets and Flowcharts     | Improvement Project                           |
| Scatter Diagrams and Histograms | Making Connections                            |
| Pareto Analysis                 | 6. Session 6: Customer Relationships          |
| Control Charts                  | Customer Satisfaction                         |
| Cause-and-Effect Diagrams       | Obtaining Customer Feedback                   |
| Improvement Tool Activity       |   |



7. A Personal Action Plan  
Starting Point  
Where I Want to Go

- How I Will Get There
8. Course Summary
9. Recommended Reading List
10. Post-Course Assessment

## Skills for the New Employee

### Course Overview

Mastering certain behaviors and skills can help an employee in their first days at a new job.

### Learning Objectives

- Understand the importance of professional presence on the job
- Understand the importance of a positive attitude
- Understand the role of stress reduction in nurturing a positive attitude and appreciate various methods of stress reduction
- Determine your own level of assertiveness and understand and improve your assertiveness
- Learn how to self-manage to become more effective and efficient
- Learn the importance of working as a team member
- Improve your communications skills, including listening, questioning and non-verbal communication
- Learn how to set goals and create a personal action plan

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview<br>Learning Objectives<br>Pre-Assignment<br>Pre-Course Assessment  | 6. Session Six: Time Management and<br>Planning<br>Self-Management<br>Making Connections<br>Time Management Tips<br>Where Do You Stand?<br>Planning |
| 2. Session Two: Personal Best, Professional<br>Best<br>The Importance of Appearance<br>First Impressions Count!<br>Making Connections                                      | 7. Session Seven: Working as a Team<br>Working as a Team Exercise   |
| 3. Session Three: What Employees Want<br>What Employees Want   | 8. Session Eight: Asking and Listening<br>Asking Questions<br>Active Listening<br>Tips for Becoming a Better Listener                               |
| 4. Session Four: Positive Attitude<br>Having a Positive Attitude<br>Stress Reduction: Nurturing Your Positive<br>Attitude  | 9. Session Nine: Non-Verbal Messages<br>Types of Non-Verbal Messages<br>Body Language<br>The Signals People Send                                    |
| 5. Session Five: Understanding and Improving<br>Assertiveness<br>What is Assertiveness?<br>Making Connections<br>Quiz<br>Answer Key<br>Improving Your Assertiveness Skills | 10. Session Ten: Setting Goals<br>Setting SMART Goals<br>Making Connections<br>A Personal Action Plan   |
|  | 11. Personal Action Plan  |

Starting Point  
Where I Want to Go  
How I Will Get There

12. Course Summary  
13. Recommended Reading List  
14. Post-Course Assessment

## Skills You Need for Workplace Success

### Course Overview

There have been a number of studies that identify the key skills that workers need to be successful. Various studies call them different things - critical employability skills, soft skills, or transferrable skills. Regardless of the name these skills are critical for workplace success. Eight of the most commonly identified skills are: Being a Productive Team Member, Flexibility, Problem Solving, Resourcefulness, Giving and Receiving Feedback, Self-Confidence, Creative Thinking and Emotional Intelligence. Many of us possess one or more of these attributes already and perhaps all of them. Luckily these skills can be improved upon through training.

This course looks to take you from where you are now to a new level of understanding for the key skills that will help to make you successful at work.

### Learning Objectives

- Know your own team member roles and responsibilities
- Understand ways to be an effective team member
- Know how it feels to experience change and know your level of change tolerance
- Understand ways to be flexible in times of change
- Know what a problem is and ways to approach problem solving
- Recognize the self-fulfilling prophecy and its relevance to their work
- Appreciate the variety of behaviors that characterize resourcefulness in the workplace
- Identify tips to giving and receiving feedback
- Realize the uses of feedback to increase their strengths as leaders in the workplace
- Recognize self-confident behaviors in the workplace
- Utilize a three-step process to building your own self-confidence
- Apply a number of group methods for creative thinking
- Recount the history of social and emotional intelligence theory
- Define Daniel Goleman's five sets of social and emotional competencies and correlate them to workplace experiences

### Course Outline

- |  |                               |
|--|-------------------------------|
| 1. Session 1: Course Overview          | 3. Session 3: Flexibility     |
| Learning Objectives                    | Change Exercise               |
| Pre-Assignment                         | Change Tolerance              |
| Pre-Course Assessment                  | Making Connections            |
| 2. Session 2: Being a Team Player      | Becoming Flexible             |
| Team Role Analysis Questionnaire       | Analyzing Change              |
| Team Member Roles and Responsibilities | 4. Session 4: Problem Solving |
| Effective Team Membership              | What is a Problem?            |

Eight Essentials to Defining a Problem  
Summary

5. Session 5: Resourcefulness  
Self-Fulfilling Prophecy  
Characteristics of Resourcefulness
6. Session 6: Feedback  
Giving and Receiving Feedback  
Giving Feedback  
Receiving Feedback  
Feedback Interviews  
Simulated Feedback Session
7. Session 7: Self-Confidence  
What does Self-Confidence Look Like?  
Building Self-Confidence  
Step 1: Know Who You Are  
Your Individual SWOT Analysis  
Individual SWOT Analysis

Step 2: Know Where You Want To Go

Step 3: Make a Doable Plan To Get There

8. Session 8: Creative Thinking  
Methods for Creative Thinking  
Other Methods  
Creative Thinking Exercise
9. Session 9: Emotional Intelligence  
History of Social and Emotional Intelligence  
Defining Social and Emotional Intelligence
10. A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There
11. Course Summary
12. Recommended Reading List
13. Post-Course Assessment

# Social Media Marketing

## Course Overview

Many people are familiar with how to use social media, but not everyone knows the best ways to use social media to market a business. Find out here.

## Learning Objectives

- Describe the value of social media to your marketing plan
- Create and launch a social media marketing plan
- Select the right resources for a social media marketing team
- Define how to use social media to build an internal community
- Use metrics to measure the impact of a social media plan
- Manage difficult social media situations
- Describe features of some of the key social media sites, including Facebook, LinkedIn, and Twitter
- Decide whether a blog adds value to a social media plan
- Speak about specialty sites and social media management tools
- Stay on top of social media trends and adjust your plan as the online world evolves

## Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview                               | Utilization Guidelines  |
| Learning Objectives   | What is the Value?  |
| Pre-Assignment  | Expanding a Digital Presence                                  |
| Pre-Course Assessment   | Making Connections  |
| 2. Session Two: Getting Started                               | 6. Session Six: Building a Social Media Team                  |
| What is Social Media?   | Building the Team   |
| Pre-Assignment Review   | The Community   |
| 3. Session Three: Understanding the Marketing Mix             | 7. Session Seven: Using Social Media for Internal Communities |
| The Five P's and Social Media                                 | Does it Mean Everyone is Online All the Time?                 |
| Making Connections  | Make it Work  |
| 4. Session Four: Developing a Social Media Marketing Strategy | 8. Session Eight: analyzing the Impact with Metrics           |
| Components of a Social Media Marketing Strategy               | Useful Metrics  |
| How to Create a Social Media Marketing Strategy               | Understanding Metrics   |
| Best Practices  | Timing is Everything  |
| 5. Session Five: Developing a Social Media Plan               | 9. Session Nine: Keeping on Top of the Trends                 |
| Difference Between Strategy and Plan                          | The Times are A-Changing                                      |
| Things to Think About   | 10. Session Ten: Damage Control                               |
|   | Case Studies  |
|   | What to Do  |

- 11. Session Eleven: Using Facebook
  - Getting Started
  - Building a Community
  - Facebook Groups
- 12. Session Twelve: Using LinkedIn
  - LinkedIn Essentials
  - Utilizing LinkedIn for Business Goals
- 13. Session Thirteen: Using X
  - The Basics
  - Getting Started
  - Making It Memorable
  - Using Lists
- 14. Session Fourteen: Building a Blog
  - To Blog or Not to Blog?
  - Blog Rules
  - Help People Find the Blog
  - Planning a Blog
  - Vlogs And YouTube
- 15. Session Fifteen: Using Specialty Sites
  - Specialty Sites
- 16. Session Sixteen: Using Social Media
  - Management Tools
  - Social Media Management Tools
- 17. Session Seventeen: Launching the Plan
  - Pulling Everything Together
  - Preparing For Delivery or Upgrade
- 18. Personal Action Plan
- 19. Course Summary
- 20. Recommended Reading List
- 21. Post-Course Assessment

## Social Selling for Small Businesses

### Course Overview

Social selling isn't just a fad or the latest approach to selling that businesses need to adopt. It's a result of the massive integration of social media in how we conduct our lives. Sales professionals understand they can connect to and leverage these habits. This course is designed for entrepreneurs and sales professionals to learn how to function in that space. In this course, we're going to explore how social selling is an essential requirement for sales teams, and how the relationships that are created and nurtured within social media will help you grow and sustain your business. We'll also learn how to apply specific techniques to connect with your audience and potential fans in the social space.

### Learning Objectives

- Describe the attributes of social selling
- Explore how social selling can generate results for your small business
- Apply social selling strategies to create relevance in social media
- Understand the power of leveraging different social media platforms in social selling
- Measure your social selling results

### Course Outline

- |                                       |                                     |
|---------------------------------------|-------------------------------------|
| 1. Session 1: Course Overview         | Who Do You Know?                    |
| Learning Objectives                   | What It's All About                 |
| Pre-Assignment                        | Expanding Your Circle               |
| Pre-Course Assessment                 | Other People's Content              |
| 2. Session 2: Defining Social Selling | Making Connections                  |
| It Is What It Is                      | Blog Post: Think You Can Ignore a   |
| The Relationship Between Social Media | Cracked or Pitted Windshield?       |
| and Sales Professionals               | Question                            |
| Pre-Assignment Review                 | 5. Session 5: Sharing Content       |
| Getting Clear                         | Being Relevant                      |
| What's Your Purpose?                  | Making Connections                  |
| Case Study                            | Helping Your Sales Team Flourish    |
| 3. Session 3: Doing Your Research     | What About You?                     |
| Who Will You Connect With?            | Defining Yourself                   |
| Why Do You Want To Connect With       | Coaching Your Team                  |
| Them?                                 | Listen and Learn                    |
| How Will You Connect and Engage?      | Case Study                          |
| Making Connections                    | Getting in Touch                    |
| Making It Work                        | 6. Session 6: Leveraging Technology |
| What Do You Need?                     | Diving In                           |
| The Changing Marketplace              | Social Platforms – LinkedIn         |
| 4. Session 4: Building Relationships  | Getting Started                     |



- Social Platforms – Twitter
- Knowing When You’re There
- Summary
- Social Platforms – The Beauty of Pictures
- 7. Session 7: Measuring the Results
  - Measuring Social Media
  - Your CRM
- 8. Session 8: Keep Going Forward
  - Keep Moving
  - Making Connections
- 9. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Course Summary
- 11. Recommended Reading List
- 12. Post-Course Assessment

## Story Marketing for Small Businesses

### Course Overview

Cultures, both ancient and modern, have strong storytelling traditions. Human brains are wired to share and process information through storytelling. Information presented as a story has the power to inform, influence and motivate. Story marketing is the process of attracting and engaging customers through story — their story, rather than yours. Instead of the “buy our product” messages of typical marketing campaigns, story marketing tells the customer story and motivates them to connect with your company as a solution to their problem or a way to a better life.

This course will highlight the essentials of story marketing for a small business: tools to use, storytelling basics, and how to write and refine a company’s story for marketing to its target audience.

### Learning Objectives

- Define story marketing
- Recognize and use the essential tools of story marketing
- Understand the basics of good storytelling
- Examine ways to connect with customers
- Refine their company brand for story marketing
- Discover and build your own story
- Polish your story for maximum results

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview            | 5. Session Five: Refining Your Brand   |
| Learning Objectives                        | Understanding Your Company             |
| Pre-Assignment                             | Identifying Your Message               |
| Pre-Course Assessment                      | Strengthening Your Brand               |
| 2. Session Two: Story Marketing Toolkit    | 6. Session Six: Building Your Story    |
| Your Message                               | Show and Tell                          |
| Your Inspiration                           | Parts of Your Story                    |
| Your Toolkit                               | Plan for Success                       |
| 3. Session Three: Storytelling Essentials  | Writing Your Story                     |
| What Exactly is a Story?                   | 7. Session Seven: Polishing Your Story |
| Story for Your Brand                       | Polishing a Rough Draft                |
| The Truth Test                             | The Editing Process                    |
| 4. Session Four: Connecting with Customers | Editing Checks                         |
| Connecting with Customers                  | Peer Review                            |
| It is About the Customer                   | 8. Personal Action Plan                |
| Understanding Your Customers               | 9. Course Summary                      |
| Brainstorming                              | 10. Recommended Reading List           |

## 11. Post-Course Assessment

## Strategic Planning

### Course Overview

Imagine an individual is preparing to leave for a trip. Are they likely to reach their destination if they have no clear plan on how to travel there? For a company, a strategic plan accomplishes the same goals as a trip itinerary; it establishes direction and details measurable goals, creating a roadmap to follow. Businesses that do not have a strategic plan can suffer from low productivity and morale, high staff turnover rates, and decreased profits.

This course will help you avoid these types of problems by putting a plan in place that describes a vision for the future, along with clear goals and objectives. Through this course, you will craft a strategic roadmap, helping you drive long-term success within your organizations.

### Learning Objectives

- Identify the values that support the company.
- Define the vision for the company.
- Write a mission statement that explains what the company's purpose is.
- Complete meaningful SWOT analyses.
- Apply tools and techniques to create a strategic plan that directs the organization from the executive to the front line.
- Implement, evaluate, and review a strategic plan.
- Identify how related tools, such as a strategy map and balanced scorecard, can help with developing a strategic plan.

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                  | 5. Session Five: On a Mission   |
| Learning Objectives                              | Defining the Mission Statement  |
| Pre-Assignment                                   | Designing a Mission Statement   |
| Pre-Course Assessment                            | 6. Session Six: Performing a SWOT Analysis                              |
| 2. Session Two: Understanding Strategic Planning | What is a SWOT Analysis?  |
| What is Strategic Planning?                      | Individual Analyses   |
| Making Connections                               | SWOT Ratings  |
| Pyramid Structure                                | 7. Session Seven: Setting Goals   |
| 3. Session Three: Identifying Our Values         | Fitting into the Plan   |
| Pre-Assignment Review                            | SMART Goals   |
| Creating Value Statements                        | Getting Into It   |
| 4. Session Four: Designing the Vision            | 8. Session Eight: Assigning Roles, Responsibilities, and Accountability |
| The Vision Process                               | Who Does What and When?   |
| Defining the Vision                              | Establishing Priorities   |

- Problem Solving in Action
- 9. Session Nine: Gathering Support
  - Reviewing the Plan
  - Putting it Into Practice
- 10. Session Ten: Making the Change
  - Control and Change
  - The Three Phases
  - Insights
- 11. Session Eleven: Presenting the Plan
  - Formats

- Creative Considerations
- 12. Session Twelve: Anticipating Problems
  - Planning for Problems
  - Ensuring Success
  - Balanced Scorecard
- 13. Session Thirteen: Creating a Plan
  - Test Driving
- 14. Personal Action Plan
- 15. Course Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment

## Stress Management

### Course Overview

Today's workforce is experiencing job burnout and stress in epidemic proportions. Workers at all levels feel stressed out, insecure, and misunderstood. Many people feel the demands of the workplace, combined with the demands of home, have become too much to handle. This course explores the causes of such stress, and suggests general and specific stress management strategies that people can use every day.

### Learning Objectives

- Understand that stress is an unavoidable part of everybody's life
- Recognize the symptoms that tell you when you have chronic stress overload
- Change the situations and actions that can be changed
- Deal better with situations and actions that can't be changed
- Create an action plan for work, home, and play to help reduce and manage stress

### Course Outline

1. Session 1: Course Overview
  - Learning Objectives
  - Pre-Assignment: Holmes-Rahe Stress Rating
  - Pre-Course Assessment
2. Session 2: Defining Stress and How It Affects Us
  - Where Are You Now?
  - Defining and Identifying Stress
  - Pre-Assignment
  - What Does It Mean?
  - Ways to Look at Your Stress
  - Understanding Stress
  - Coping Behaviors
  - Stress and Your Health
  - Causes of Stress
3. Session 3: What is Stress About?
  - Stress Can Be About Changing Lifestyles
  - Stress Can Be About Power
  - Stress Can Be About Self-esteem
  - Stress Is About Change In Our Environment
  - Flexibility
  - Eustress
4. Session 4: Building a Solid Foundation
  - Taking Care of Your Body and Your Mind
  - Making Connections
  - Case Study: Carrie's Day
  - Carrie's Day
  - Questions
  - The 'Less Stress' Lessons
5. Session 5: Mental Strategies
  - Changing Ourselves
  - Personality
  - Nature of Organization
  - Quality of Support
  - The Triple A Approach
  - Alter
  - Avoid
  - Accept
6. Session 6: Stress at Work
  - The Stress Tax
  - Symptoms of Stress Overload
  - Stress Inventory
  - Scoring
  - Finding Some Solutions
  - Stress Logging

- Sample Log
- Finding Solutions
- 7. Session 7: Time Management Tips
  - Brainstorming Some Great Ideas
- 8. Session 8: Stress at Home
  - Budgeting Basics
  - Finding Resources
  - The Everyday Stuff
  - Meal Planning
  - Organization Tips
- 9. Session 9: Drainers and Fillers
  - Personal Drainers
  - Personal Fillers
- 10. Session 10: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 11. Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Successfully Managing Change

## Course Overview

None of us can escape change, therefore it is well worth developing strategies to manage it! Because everyone has to manage change, having tools to help embrace it lead to the best outcomes. Successfully Managing Change includes the stages and pace of change, dealing with resistance, adaptive strategies, approaching change as an opportunity for growth, and more.

## Learning Objectives

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

## Course Outline

1. Session One: Course Overview
  - Learning Objectives
  - Pre-Assignment
  - Pre-Course Assessment
2. Session Two: What is Change?
  - Leading Thinking
  - Change and Transition
  - Self-Reflection Activity
  - The Change Cycle
  - Endings
  - Transitions and The Neutral Zone
  - Beginnings
3. Session Three: What is Change Management?
  - The Three Phases
  - Keep in Mind
  - Benefits of Change Management
  - Insights
4. Session Four: The Human Reaction to Change
  - Control and Change
  - Relating to Your Workplace
  - The Four-Room Apartment
  - Your Room Discussion
5. Session Five: The Pace of Change
  - The Trend of Change
  - Why 20 Per Cent?
  - Who Are You?
  - Positive Change Activity
6. Session Six: Dealing with Resistance
  - Understanding Resistance
  - Analyzing Successful Change
  - Making Change Stick: Action Planning
  - Making Change Stick: Reinforcement
  - Strengthening a Change



- 7. Session Seven: Adapting to Change
  - Adjusting Your Attitude
  - Some Facts about Attitude
  - Overcoming the Fear of Change
  - Understanding Resiliency
  - Applying the Five Keys
  - Pre-Assignment Review Reflection
- 8. Session Eight: Coping with Reactions to Change
  - Stress Management
  - Dealing with the Stress
- 9. Session Nine: Delivering Your Message
  - Delivering a Clear Message
  - Check for Understanding
- 10. Session Ten: Action Plan
  - Developing an Action Plan
- 11. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 12. Course Summary
- 13. Recommended Reading List
- 14. Post-Course Assessment

## Survival Skills for the New Trainer

### Course Overview

If you are thinking about becoming a trainer, or have started conducting some training already and want to know more about what will help you to become an excellent trainer, this course will help. This course is designed as an exploration of the essential skills that trainers need to develop, getting you started with learning in an interactive and fun environment.

### Learning Objectives

- Understand the essential background for trainers to have
- Explore how being genuine enhances training
- Identify the elements of good questions
- Understand how to apply listening skills
- Develop rapport-building strategies
- Recognize key skills in a trainer's toolbox and identify skill areas for development

### Course Outline

- |  |  |
|--|--|
| Session One: Course Overview                       | 5. Session Six: Asking The Right Questions       |
| Learning Objectives                                | Asking Good Questions                            |
| Pre-Assignment                                     | Improving Communication with Questions           |
| Pre-Course Assessment                              | Types of Open-Ended Questions                    |
| 1. Session Two: What Makes a Good Trainer?         | Probing  |
| Background Information                             | Pushing My Buttons                               |
| Pre-Assignment Review                              | 6. Session Seven: Listening Skills               |
| Adult Learning                                     | Can You Hear Me?                                 |
| 2. Session Three: Personal Best, Professional Best | Active Listening Skills                          |
| Putting Your Best Foot Forward                     | Tips For Becoming A Better Listener              |
| Tips For Looking Professional                      | What Is Said And What Is Heard                   |
| Making Connections                                 | 7. Session Eight: Connecting With People         |
| 3. Session Four: Being Genuine                     | Rapport Building                                 |
| Making Connections                                 | Facilitative Training                            |
| 4. Session Five: Assertiveness Skills              | Other Methods To Consider                        |
| Understanding Assertiveness                        | The Tipping Point                                |
| Aggressive Behavior                                | A Shift In Training                              |
| Manipulative Or Passive-Aggressive Behavior        | Do I Have What It Takes?                         |
| Passive Behavior                                   | 8. Session Nine: Defusing Difficult Participants |
| Assertive Behavior                                 | Resolving Problems                               |

- |   |                              |
|---|------------------------------|
| 9. Session Ten: Essentials For Success      | 11. Personal Action Plan     |
| What Makes A Good Trainer                   | Starting Point               |
| 10. Session Eleven: Do's And Don'ts For New | Where I Want to Go           |
| Trainers                                    | How I Will Get There         |
| Do's  | 12. Course Summary           |
| Don't                                       | 13. Recommended Reading List |
|   | 14. Post-Course Assessment   |

## Team Building: Developing High Performance Teams

### Course Overview

Success as a manager can often depend on how well your team operates. Problem solving methods, conflict resolution skills, action planning tools, self-assessment techniques, and an understanding of team development theory can give a team the boost that they need to become a high-performing unit.

### Learning Objectives

- Identify different types of teams.
- Build teamwork by recognizing and tapping into the 12 characteristics of an effective team.
- Promote trust and rapport by exploring team player styles and how they impact group dynamics.
- Recognize the key elements that move a team from involvement to empowerment and how to give these elements to a team.
- Develop strategies for dealing with team conflict and common problems.
- Understand how action planning and analysis tools can help a team perform better.

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                       | The Five Stages of Team Development                    |
| Learning Objectives                                   | Nurturing Teams  |
| Pre-Assignment  | Important Factors in Team Development                  |
| Pre-Course Assessment                                 | Team Problem Solving                                   |
| 2. Session Two: Organizations Today                   | 8. Session Eight: Characteristics of Great Teams       |
| A Changing Structure                                  | The 12 Characteristics                                 |
| Trends in Business                                    | The First Four Characteristics                         |
| Making Connections                                    | 9. Session Nine: Civilized Disagreements and Consensus |
| 3. Session Three: Types of Teams                      | Definitions  |
| What a Team Is Not                                    | 10. Session Ten: Open Communication                    |
| Types of Teams  | Open Communication                                     |
| Defining a Team                                       | 11. Session Eleven: Clear Roles and Assignments        |
| 4. Session Four: Team Norms                           | The Eighth Characteristic                              |
| Team Norms  | Leader's Expectation Checklist                         |
| 5. Session Five: The TORI Team Building Model         | 12. Session Twelve: Shared Leadership                  |
| The TORI Model  | About Shared Leadership                                |
| 6. Session Six: A Team's Activities                   | 13. Session Thirteen: Team Player Types                |
| Four Activities                                       | What is Your Team Player Type?                         |
| Thinking About the Four Activities                    | Pre-Assignment Review                                  |
| 7. Session Seven: The Five Stages of Team Development |  |

- Descriptions of the Team Player Types
- What is Important?
- My Team Style
- 14. Session Fourteen: The Trust/Relationship Model
  - Model Overview
- 15. Session Fifteen: Lateral and Vertical Thinking
  - The Importance of Lateral Thinking
  - Lateral Thinking vs. Vertical Thinking
- 16. Session Sixteen: Creative Team Thinking
  - Creative Thinking Methods
  - Limitations of Brainstorming
  - Brainwriting
  - Brainstorming and Brainwriting
  - More Methods
  - Creative Thinking Exercise
  - Favorite Method Selection
  - Idea Organization
- 17. Session Seventeen: Team Shaping Factors
  - The Four Factors
  - The Conference
  - The Scenario
  - Team Leader's Worksheet
- 18. Session Eighteen: Solving Problems
  - Problem-Solving Model Overview
  - Problem-solving Practice
  - Getting Creative
- Phase One
- Perception
- Analysis
- Phase Two
- Creative Thinking Methods
- Phase Three
- Planning and Organizing
- 19. Session Nineteen: Interventions for Team Leaders
  - Problems and Solutions
  - Case Study
- 20. Session Twenty: Resolving Conflict
  - Ways to Resolve Conflict
  - Resolving Internal Conflict
  - Preventing Internal Conflict
- 21. Session Twenty-One: SWOT Analysis
  - The Meaning of SWOT
  - Case Study
- 22. Session Twenty-Two: Developing Team Action Plans
  - Planning Tools
  - Making Your Team Improvement Plan
  - Intention vs. Actions
  - Action Planning Chart
- 23. Personal Action Plan
- 24. Course Summary
- 25. Recommended Reading List
- 26. Post-Course Assessment

## Telemarketing: Using the Telephone as a Sales Tool

### Course Overview

Virtually everybody in sales today sells over the phone at least part of the time. Perhaps it is time for you to evaluate how you use the telephone and where it fits into your sales and marketing mix. This course will show you how the telephone can supplement, enhance, and sometimes replace other means of marketing and selling, and how this personal approach can dramatically increase your sales success. We will also talk about how to hone your communication skills, your ability to persuade, and techniques to personalize each sales call.

### Learning Objectives

- Build trust and respect with customers and colleagues
- Warm up your sales approach to improve success with cold calling
- Identify ways to make a positive impression
- Identify negotiation strategies that will make you a stronger seller
- Create a script to maximize your efficiency on the phone
- Learn what to say and what to ask to create interest, handle objections, and close the sale

### Course Outline

- |                                       |   |
|---------------------------------------|---|
| 1. Session 1: Course Overview         | Planning the Ideal Answer                 |
| Learning Objectives                   | Try Out These Phrases                     |
| Pre-Assignment                        | 5. Session 5: Exceptional Things about    |
| Pre-Course Assessment                 | Telephone Sales                           |
| 2. Session 2: Pre-Assignment Review   | Keeping a Positive Outlook                |
| Your Pre-Assignment Answers           | Give Yourself Time to Learn               |
| Self-Improvement                      | Rapport Building                          |
| 3. Session 3: Verbal Communication    | Guidelines for Remembering Names          |
| Being Yourself and Sounding Your Best | 6. Session 6: Building Trust              |
| The Masterpiece of Voice              | Building Trust                            |
| The Four E's                          | Defining Trust and Respect                |
| A Service Image: What Do Your         | 7. Session 7: It's More Than Just a Phase |
| Customers Hear?                       | Phases of Negotiation                     |
| A Service Image: What Do You Want     | Exploring the Phases                      |
| Your Customers To Hear?               | Types of Negotiation                      |
| The Good, the Bad, and the            | Other Negotiation Tips                    |
| Not-to-Mention                        | Defining the Negotiation Types            |
| Becoming a Customer Service Superstar | Negotiation Experience                    |
| 4. Session 4: To Serve and Delight    | 8. Session 8: Communication Essentials    |
| What You Say and What it Means        | Active Listening Skills                   |
| Your Interpretation                   | Active Listening                          |

- Listening at Work
- Zero in on the Matter at Hand
- The Mission – To Listen
- Plotting Your Score
- Ten Ingredients for Good Communication
- Ingredient 1: Your Greeting
- Ingredient 2: Vocabulary
- Ingredient 3: Choice of Words
- Ingredient 4: Stop Speaking
- Ingredient 5: Control Your Enthusiasm
- Ingredient 6: Think then Speak
- Ingredient 7: Who Are You Speaking To?
- Ingredient 8: Act on Your Words
- Ingredient 9: Ask to Understand
- Ingredient 10: Paraphrase
- Using the Ingredients
- Asking Good Questions
- Closed Questions
- Open Questions
- Probing
- Probing Question Techniques
- 9. Session 9: Developing Your Script
  - The Basic Script
  - Speaking With Customers
  - Warm Up the Cold Call
  - Basic Script
  - Basic Script Summary
  - Sample Script
  - Making the Script Yours
  - Notes on Using the Script
  - Customizing the Basic Script
  - Polishing the Script
- My Script
- 10. Session 10: Pre-Call Planning
  - Pre-Call Planning
- 11. Session 11: Phone Tag and Call Backs
  - Call Tracking Plans
  - Voice Mail Option 1: The Referral
  - Voice Mail Option 2: The Third-Party Message
  - Voice Mail Option 3: The Warm Cold Caller
  - Voice Mail Option 4: The Straight-Ahead Pitch
  - Voice Mail Tips
- 12. Session 12: Following Up
  - Missed Opportunities?
  - Creating a Template
- 13. Session 13: Closing the Sale
  - Asking for the Sale
  - Clearing Away Objections
  - Closing the Sale
  - Example Closing Strategies
  - Using Closing Techniques
  - Persistence Pays Off
  - Thank You Notes
- 14. Session 14: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 15. Summary
- 16. Recommended Reading List
- 17. Post-Course Assessment

# The ABC's of Supervising Others

## Course Overview

This course is for people who are new supervisors or who are interested in a supervisory position, as well as those who are team leads or part-time supervisors without a great deal of authority. This course is designed to help students overcome many of the supervisory problems that they will encounter as a workplace leader. Dealing with the problems that a new supervisor encounters isn't easy, but it doesn't have to lead to discouragement.

## Learning Objectives

- Adjust to the supervisor's role with confidence
- Develop your skills in listening, asking questions, resolving conflict, and giving feedback to employees
- Identify key attitudes that you can develop to enhance your supervisory skills
- Use time management and planning techniques to maximize your success
- Develop a technique for giving instructions that are clear and understood
- Understand the importance of developing good relationships with employees and peers, so you are seen as fair and consistent

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                     | Learning Plans                                 |
| Learning Objectives                               |  |
| Pre-Assignment                                    | 6. Session 6: Setting Goals                    |
| Pre-Course Assessment                             | Know Where You Are Going                       |
| 2. Session 2: Pre-Assignment Review               | Getting Specific                               |
| Pre-Assignment Review                             | Setting Goals with SPIRIT                      |
| 3. Session 3: Making the Transition               | 7. Session 7: Planning for Success             |
| How Will My Role Change?                          | How Can Planning Help Me?                      |
| Coping with the Changes                           | Getting Things In Order                        |
| What to Say If You're Teased About Being the Boss | Making Connections                             |
| Tips for Learning the Ropes Quickly               | Mastering E-mail                               |
| Questions Supervisors Have                        | Calculating Your Time                          |
| 4. Session 4: Responsibilities of a Supervisor    | Tips for Tackling the E-Mail Monster           |
| Making Connections                                | Time Management Tips                           |
| 5. Session 5: Key Behaviors and Attitudes         | Key Planning Points                            |
| Building the Right Environment                    | Putting Plans into Action with Scheduling Aids |
| Cues for Success                                  | Organizing Your Work Area and Your Paperwork   |
| Motivation from Within                            | The Master Plan                                |
| Making Connections                                | The Supporting Plan                            |
| Committing to Lifelong Learning                   | Usage of Resources                             |
| The Value of Practice                             | The Next Steps                                 |



- Suggestions to Maximize Planning and Prioritizing
- 8. Session 8: Active Listening Techniques
  - About Active Listening
  - Key Listening Skills
  - Responding to Feelings
  - Reading Cues
  - Demonstration Cues
  - Tips for Becoming a Better Listener
- 9. Session 9: Communication Skills
  - Questioning Skills
  - Open Questions
  - Closed Questions
  - Opening Up Our Questions
  - Probing Techniques
  - Pushing My Buttons
  - What Is Said and What Is Heard
  - Managing Our Non-Verbal Messages
- 10. Session 10: Giving Feedback
  - Six Characteristics of Effective Feedback
  - Skill Building
  - Receiving Feedback
- 11. Session 11: Giving Instructions
  - Understanding Learning Styles
  - Obstacles to Effective Instructions
- 12. Session 12: Orders, Requests, and Suggestions
  - Defining the Terms
  - Requests
- Suggestions
- Making Connections
- 13. Session 13: Managing Conflict
  - The Conflict Resolution Process
  - When To Get Involved
  - Breaking Down the Process
- 14. Session 14: Managing Challenging Situations
  - Steps for a Difficult Conversation
  - Step 1: Make Sure the Receiver is Ready
  - Step 2: State Your Purpose
  - Step 3: Ask For Their Story
  - Step 4: Tell Your Side
  - Step 5: Get to The Third Side
  - Step 6: Evaluate the Three F's
  - Step 7: Create an Action Plan, If Appropriate
  - Step 8: Follow Up
  - Case Studies
- 15. Session 15: Dealing with Others
  - Understanding Your Relationships
  - Establishing Credibility
- 16. Session 16: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 17. Summary
- 18. Recommended Reading List
- 19. Post-Course Assessment

# The Importance of Peer-to-Peer Recognition

## Course Overview

Research shows that appreciation and recognition for one's work is essential for employee satisfaction. It fulfills a basic human need to feel seen by others. When employees receive that acknowledgement, it often comes from managers and supervisors. Although this is important, peer-to-peer recognition also plays a crucial role in creating a supportive and productive workplace. Peer-to-peer recognition is when team members celebrate each other's efforts and accomplishments, creating a culture where people feel valued.

Workplaces that encourage employees to practice gratitude for the contributions of co-workers often see positive results, such as increased employee engagement and lower turnover.

This course will underline the value of peer-to-peer recognition and provide practical strategies for recognizing the contributions of colleagues.

## Learning Objectives

- Explain why peer-to-peer recognition is important for individual motivation and team culture.
- Recognize the contributions of their colleagues in effective and meaningful ways.
- Identify different ways organizations can embed peer acknowledgment and celebration into their workplace culture.
- Describe how some businesses are using structured peer recognition systems, and list strengths and weaknesses of formal programs.
- Understand the structure of a strong peer acknowledgement and use it to go beyond vague, generic praise.
- Create guidelines for effective peer recognition in the workplace.
- Design a team ritual that helps sustain a culture of appreciation.
- Commit to simple actions that make recognition part of their regular work habits.

## Course Outline

- |                                       |  |
|---------------------------------------|--|
| 1. Session One: Course Overview       | 3. Session Three: Giving and Receiving |
| Learning Objectives                   | Recognition                            |
| Pre-Assignment                        | Using the Right Words                  |
| Pre-Course Assessment                 | Practicing Effective Recognition       |
| 2. Session Two: Defining Peer-to-Peer | Micro-Planning Moment                  |
| Recognition                           | 4. Session Four: Meeting Agreements    |
| Recognizing the Value                 | Meeting Agreements                     |
| Types of Recognition                  | 5. Session Five: Action Planning       |
| Case Studies                          | Pulse Check                            |
| Micro-Planning Moment                 | Drafting a Plan                        |
|                                       | 6. Personal Action Plan                |

- 7. Course Summary
- 8. Recommended Reading List

- 9. Post-Course Assessment

# The Minute Taker's Workshop

## Course Overview

Whether you are a new minute-taker or someone who has been producing minutes for a while, you can benefit from this course. Learn what the role entails, and techniques for producing an accurate record of what took place at a meeting.

## Learning Objectives

- Know what is expected of a minute taker
- Develop key minute taking skills, including listening skills, critical thinking, organization, and good note taking
- Write minutes that are suitable for formal meetings, informal meetings, and action minutes
- Be an efficient minute taker in any type of meeting
- Prepare and maintain a minute book

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                | Recording Motions and Resolutions          |
| Learning Objectives                            | What to Record                             |
| Pre-Assignment                                 | 7. Session Seven: Techniques for Preparing |
| Pre-Course Assessment                          | Minutes                                    |
| 2. Session Two: The Role of a Minute Taker     | Top Techniques                             |
| What is a Minute Taker?                        | Writing Minutes                            |
| The Purpose of Minutes                         | Exercise                                   |
| Problems and Solutions                         | Session Eight: Taking Minutes in an        |
| 3. Session Three: The Skills of a Minute Taker | Interactive Meeting                        |
| Key Skills                                     | Interactive Meetings                       |
| Listening Skills                               | The Role of the Facilitator                |
| Tips for Becoming a Better Listener            | Taking Minutes at an Interactive Meeting   |
| Critical Thinking Skills                       | 8. Session Nine: The Minute Book           |
| Organization Skills                            | The Minute Book                            |
| Note Taking Skills                             | 9. Session Ten: Minutes Practice           |
| 4. Session Four: Meeting Agreements            | Applying Your Learning                     |
| Meeting Agreements                             | Meeting Minutes                            |
| 5. Session Five: Minutes Styles                | 10. Personal Action Plan                   |
| Choosing a Style                               | 11. Course Summary                         |
| Informal Minutes                               | 12. Recommended Reading List               |
| Action Minutes                                 | 13. Post-Course Assessment                 |
| Formal Minutes                                 |  |
| 6. Session Six: What Do I Record?              |  |

# The Practical Trainer

## Course Overview

Most people who call themselves trainers today probably didn't start out to be trainers. They often work in a field where they develop extensive knowledge and then are asked to share what they know. Many trainers have some experience with teaching, writing, or leadership, although they come from nearly every field.

As such, people who work as trainers are often put into difficult situations without much understanding of what training is or how to do it well. We know that being a good trainer is the result of developing skills to bring information to an audience. This information will then engage, empower, and encourage continued learning and development.

This course will give you the skills that you need so that your students not only learn, but also enjoy the process, retain information shared, and use their new skills back in the workplace.

## Learning Objectives

- Recognize the importance of considering the participants and their training needs, including the different learning styles and adult learning principles
- Know how to write objectives and evaluate whether these objectives have been met at the end of a training session
- Develop an effective training style, using appropriate training aids and techniques
- Conduct a short group training session that incorporates these training concepts

## Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                | How to Inhibit Learning                    |
| Learning Objectives                          | 4. Session 4: A Word About Adult Learning  |
| Self-Development: A Checklist for            | Understanding Adult Learning               |
| Trainer-Trainees                             | 5. Session 5: The Learning Process         |
| Pre-Assignment                               | The Four Steps                             |
| Pre-Course Assessment                        | 6. Session 6: Principles of Adult Learning |
| 2. Session 2: Defining a Successful Training | Making Connections                         |
| Program                                      | The Principles of Adult Learning           |
| Defining Successful Training                 | Making Connections                         |
| About Audiences                              | 7. Session 7: What's Your Type? How About  |
| Advantages of Workplace Training             | Mine?                                      |
| 3. Session 3: What Makes a Successful        | Assessing Your Preferences                 |
| Trainer?                                     | Questionnaire                              |
| Key Characteristics                          | What Does it Mean To Have a Number?        |
| Mistakes and Solutions                       | Mostly A's – Inquiring Rationals           |
| Stimulating a Readiness to Learn             | Mostly B's – Authentic Idealists           |
| How to Facilitate Learning                   | Mostly C's – Organized Guardians           |

- Mostly D's – Resourceful Artisans
- What's Important?
- The Experiential Learning Cycle
- Kolb's Learning Cycle
- Modifying Our Approach
- The Authentic Idealist Learning Style
- The Inquiring Rational Learning Style
- The Resourceful Artisan Learning Style
- The Organized Guardian Learning Style
- 8. Session 8: Applying the Learning Cycle
  - The Four-Stage Cycle
  - Example
  - Making Connections
  - Individual Exercise
- 9. Session 9: Extroverts and Introverts
  - Introversion/Extroversion Survey
  - Questionnaire
  - Case Study: Ashley and Holly
  - Lessons to Learn
  - Typical Workshop Participants
- 10. Session 10: The Training Process
  - Process in Brief
  - When is Training Necessary?
  - Three Steps to an Efficient Needs Analysis:
    - Overview
    - Isolating
    - Steps in ICE
    - Consulting
    - Evaluating
  - When is Training Not Appropriate?
  - Help! I Need a Template!
- 11. Session 11: Planning Training
  - Developing Objectives
  - Determining Objectives
  - Considerations When Writing Objectives
  - Types of Objectives
  - Setting the Scope
  - Writing Tips
  - Verbs for Writing Clear, Concise Training Objectives
  - Writing Objectives
  - Researching Content
- Planning an Interactive Program
- 12. Session 12: Choosing Training Methods
  - Choosing the Right Method
  - Overview of Common Training Methods
  - Summary
  - Environmental Concerns
  - Individual Exercises
- 13. Session 13: Designing a Learning Sequence
  - The Model
  - Sample Sequences
- 14. Session 14: Adding Games
  - The Value of Games
  - Choosing the Right Game
  - Facilitator Responsibilities
- 15. Session 15: Setting the Climate
  - Creating Atmosphere
- 16. Session 16: Presentation Skills
  - Limitations of Telling
  - Limitations of Showing
  - Overcoming Nervousness
  - Using Non-Verbal Communication
  - The Appropriate Distance between You and the Audience
  - Stand Erect
  - Consider Your Appearance
  - Move About and Use Gestures
  - Control Your Facial Expressions and Mannerisms
  - Maintain Eye Contact
  - Using Notes
  - Managing the Question and Answer Period
  - General Guidelines
  - Tips for Stunning Visuals
  - Tips for Success
  - Typography Tips and Tricks
  - Types of Visual Aids
  - A Word about Flip Charts
- 17. Session 17: Dealing with Difficult Trainees
  - Big Talkers
  - The Kidder
  - Exhausted and Droopy
  - Not Into It!

- Poor Follow-Through on Assignments
- Failure to Arrive/Return from Breaks on Time
- Whisperers
- 18. Session 18: On-the-Job Training
  - Essentials of On-the-Job Training
  - Step 1: Job Breakdown
  - Step 2: Demonstration
  - Step 3: Have the Trainee Do the Job (Supervised)
  - Step 4: Follow Up
  - One-on-One Peer Training
  - Hands-On Training
  - Coaching
- 19. Session 19: Training Presentations
  - Training Preparation Worksheet
- 20. Session 20: Designing Evaluations
  - Effective Evaluations
  - Examples
  - Evaluation Techniques
- 21. A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 22. Summary
- 23. Recommended Reading List
- 24. Post-Course Assessment

# The Professional Supervisor

## Course Overview

With a host of new challenges and responsibilities to tackle, new supervisors need training that helps them adjust to their new role. Learning how to supervise your new employees on a trial and error basis can lead to discouragement. This course can help you overcome many of the problems a new supervisor may encounter, and to set the groundwork for a successful change in your working life!

## Learning Objectives

- Clarify the scope and nature of a supervisory position
- Learn some ways to deal with the challenges of the role
- Recognize the responsibilities you have as a supervisor, to yourself, your team, and your organization
- Learn key techniques to help you plan and prioritize effectively
- Acquire a basic understanding of leadership, team building, communication, and motivation, and what part they play in effective supervision
- Develop strategies for motivating your team, giving feedback, and resolving conflict

## Course Outline

- |   |  |
|---|--|
| 1. Session 1: Course Overview                 | 4. Session 4: Action-Centered Leadership |
| Learning Objectives                           | Model Overview                           |
| Pre-Assignment                                | Individual                               |
| Questionnaire: Role As A Member of The        | Team                                     |
| Management Team                               | Task                                     |
| Questionnaire                                 | Considering The Possibilities            |
| Pre-Course Assessment                         | 5. Session 5: Making Plans               |
| 2. Session 2: Adjusting to Your Role          | Old Sayings With Staying Power           |
| Introduction                                  | Introduction                             |
| Be a Learner                                  | Breaking Down The Matrix                 |
| Refresh Your Network                          | Progress and Maintenance Tasks           |
| Leverage a Mentor                             | Prioritizing Case Study                  |
| Set Limits                                    | The Four Elements                        |
| Let Go  | The Importance of Goals                  |
| Pre-Assignment Review                         | Benefits for Employees                   |
| Making The Transition                         | Planning to Plan                         |
| Dealing With Older Employees                  | 6. Session 6: Setting Goals              |
| Dealing With Friends Who You Now              | Going After Your Dreams                  |
| Supervise                                     | The SPIRIT Acronym                       |
| Dealing With Unions                           | 7. Session 7: Defining Leadership        |
| 3. Session 3: A Supervisor's Responsibilities | Making Connections                       |
| Making Connections                            | Key Characteristics                      |



- A Brief History
- The Leadership Formula
- Where We Want To Be
- Direction and Support
- Case Studies
- Situation Two
- Situation Three
- Situation Four
- 8. Session 8: The Situational Leadership Model
  - The Situational Leadership II® Model
  - Director's Style
  - Coach's Style
  - Supporter's Style
  - Delegator's Style
  - Understanding Your Comfort Zone
  - Our Comfort Zone
  - The Cyclical Process
- 9. Session 9: What's Your Type? How About Mine?
  - Assessing Your Preferences
  - Identifying Your Characteristics and Preferences
  - Example
  - Questionnaire
  - What Does it Mean To Have a Number?
  - Mostly A's – Inquiring Rationals
  - Mostly B's – Authentic Idealists
  - Mostly C's – Organized Guardians
  - Mostly D's – Resourceful Artisans
  - What's Important?
  - Making Connections
- 10. Session 10: Team Building Tips
  - What is a Team?
  - What Does That Mean?
  - Advantages and Disadvantages of Teams
  - The Advantages of Teams
  - How Can Teams Help Employees Grow?
- 11. Session 11: Developing a High-Performing Team
  - The Five Stages of Team Development
  - Forming
  - Storming
  - Norming
  - Performing
  - Adjourning
  - How Can I Help?
  - Team Problem Solving
  - Tips for Effective Leadership
  - Characteristics of Team Players
- 12. Session 12: Communication Skills
  - Defining Communication
  - Making Connections
  - Communication Barriers
  - Active Listening Skills
  - Responding to Feelings
  - Reading Cues
  - Demonstration Cues
  - Tips for Becoming a Better Listener
  - Making Connections
  - Building Relationships with Questions
  - Open Questions
  - Closed Questions
  - Opening Up Questions
  - Probing Techniques
  - Verbal and Non-Verbal Probes
  - Probing Techniques
  - The Communication Process
  - Breaking Down the Process
  - Tips and Tricks
- 13. Session 13: Motivating Employees
  - To Motivate or Instigate
  - The Carrot
  - The Whip
  - The Plant
  - What Do You Think?
  - Making Connections
- 14. Session 14: Orientation and Onboarding
  - The First 48 Hours
  - Orientation
  - Onboarding
  - How Did Your Orientation Rate?
  - Questions

- 15. Session 15: Training Tips and Tricks
  - Guidelines for Effective Training
  - Developing Your Training Skills
- 16. Session 16: Providing Feedback
  - The Purpose of Feedback
  - In Private
  - Balanced
  - Relevant
  - Specific
  - Documented
  - Personal (In the Right Way)
  - Skill Building
  - Receiving Feedback
- 17. Session 17: Doing Delegation Right
  - Delegation is a Key Skill!
  - Defining Responsibility and Accountability
  - Defining Delegation
  - Making Connections
- 18. Session 18: Dealing with Conflict
  - Process Overview
  - Deciding When To Get Involved
  - The Problem Solving Model
  - Breaking Down The Model
  - Background Information
  - Team Leader's Worksheet
- 19. Session 19: Managing Disciplinary Issues
  - What is Discipline?
  - The Disciplinary Meeting
  - A Sample Discipline Checklist for a Supervisor
- 20. Session 20: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 21. Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment

# Time Management

## Course Overview

Time is money, the saying goes, and lots of it gets lost in disorganization and disruption. We also deal with a constant barrage of technology, people, and tasks that can contribute to that disorganization. Many people find that they flit from one task to another, trying to get everything done, but often falling short. You will learn how to make the most of your time by getting a grip on your workflow and office space, using your planner effectively, and delegating some of your work to other people.

In this course you will learn how to make the most of your time by getting a grip on your workflow and office space, using your planner effectively, and delegating some of your work to other people.

## Learning Objectives

- Better organize yourself and your workspace for peak efficiency
- Understand the importance of, and the most useful techniques for, setting and achieving goals
- Plan and schedule your time efficiently
- Learn how to set priorities
- Discover the ingredients for good decision-making
- Learn what to delegate and how to delegate well
- Take control of things that can derail your workplace productivity
- Create order and get organized
- Manage your workload

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview           | 5. Session Five: Setting Priorities        |
| Learning Objectives                       | Prioritizing Your Tasks                    |
| Pre-Assignment                            | Matrix Overview                            |
| Pre-Course Assessment                     | Your To-Do List                            |
| 2. Session Two: What Is Time Management?  | Managing Interruptions and Distractions    |
| Pre-Assignment Review                     | Tips for Controlling Disruptions           |
| Why Time Management Is Important          | 6. Session Six: Making Decisions           |
| 3. Session Three: Setting Goals           | Eight Ingredients for Good Decision Making |
| Goals and Targets                         | Weighing the Pros and Cons                 |
| Setting SMART Goals, Part One             | 7. Session Seven: Delegating               |
| Your Own SMART Goals                      | Assigning Tasks                            |
| 4. Session Four: Planning Tips and Tricks | Guidelines for Success                     |
| Planning Tools                            | The Story about Everybody, Somebody,       |
| Case Study                                | Anybody, and Nobody                        |
| Case Study Questions                      | Case Study: What Should Sheila Do?         |

- 8. Session Eight: Scheduling
  - Organize Your Time
  - Creating a Schedule
- 9. Session Nine: Putting an End to Procrastination
  - Eating the Frog
- 10. Session Ten: Creating Order
  - Decluttering
  - Making Connections
  - Organizing Your Work Area and Your Paperwork
  - Guidelines for Keeping a Piece of Paper
- 11. Session Eleven: Organizing Your Files
  - Sorting Based on File Type
  - File Categories
  - Electronic Files
  - The Batching Technique
- 12. Session Twelve: Managing Your Workload
  - Managing Email
  - Tips for Tackling Your Email
  - Case Study: Mary Marvelous
  - Workload Analysis
  - The 168-Hour Plan
- 13. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 14. Course Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment

## Tough Topics: Talking to Employees about Personal Hygiene

### Course Overview

As a manager, you're probably used to dealing with tough situations: employees who insist on being late, team members who miss deadlines, and staff members who can't get along. But conversations about an employee's personal appearance are a whole different ball game. It's something that we often avoid talking about, or worse, make light of. This course has two major themes. First, we'll give you a framework for having those tough conversations. We'll also give you some guidelines for customizing that framework for your organization. Then, we'll look at some common tough conversations that come up, including body odor, flatulence, poor clothing and hair decisions, and bad breath. You'll walk away well prepared for any kind of challenging conversation.

### Learning Objectives

- Identify the advantages to having tough conversations
- Describe the components to an effective behavior modification conversation
- Use your organization's resources to help you deal with hygiene issues
- Overcome barriers that employees put up when discussing hygiene problems
- Resolve hygiene issues such as bad hair days, inappropriate piercings and body art, poor clothing choices, bad breath, body odor, excessive gas, and incontinence
- Nip poor hygiene habits in the bud
- Identify ways to encourage good hygiene at your workplace

### Course Outline

- |  |   |
|--|---|
| 1. Session 1: Course Overview                                    | Step Four: Describe the Impact on the Employee and the Workplace      |
| Learning Objectives  | Step Five: Outline the Options  |
| Pre-Assignment   | Getting the Facts   |
| Pre-Course Assessment  | Making Connections  |
| 2. Session 2: Let's Talk About It!                               | 4. Session 4: Overcoming Objections                                   |
| Introduction   | Common Barriers   |
| On A Personal Note   | The Person Becomes Offended   |
| A Business Case  | The Person Won't Admit That They Have a Problem                       |
| 3. Session 3: Guidelines for Difficult Conversations             | The Person Refuses To Change Their Hygiene Habits or Appearance       |
| A Step-by-Step Guide   | The Issue Reoccurs Frequently   |
| Step One: Set the Time and Place                                 | The Person Feels Discriminated Against Because They Have a Disability |
| Step Two: Use a Soft Opener that Asks for Feedback               | Making Connections  |
| Step Three: Describe the Issue as You or Others Have Observed It |   |

- 5. Session 5: Bad Hair Days (And Weeks... and Months...)
  - Case Study
  - Suggested Approach
  - Dealing with Dandruff
- 6. Session 6: Addressing Piercings and Body Artwork
  - Case Study
  - A Note about Body Art
- 7. Session 7: Helping Employees Dress for Success
  - Introduction
  - Dress Code Violations
  - Special Scenarios
  - Offering Resources
- 8. Session 8: Bad Breath
  - Bad Breath
- 9. Session 9: Body Odor
  - Inadequate Personal Hygiene
  - Excessive Personal Hygiene
  - Medical Reasons
  - The Scent of Alcohol or Drugs
- 10. Session 10: Gastrointestinal Issues
  - Case Study
  - Dealing with Flatulence
  - Dealing with Incontinence
- 11. Session 11: Bad Habits
  - Making Connections
- 12. Session 12: Putting it into Practice
  - Making Connections
- 13. Session 13: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 14. Summary
- 15. Recommended Reading List
- 16. Post-Course Assessment

## Trade Shows: Getting the Most Out of Your Trade Show Experience

### Course Overview

Most companies spend huge amounts of time and money designing, construction, outfitting, transporting, and setting up their trade show booth. This course aims to have you understand some of the basic skills that would allow you to get the most out of your trade show experience. The workshop will start by looking at who attends trade shows and why they are there. It will explore a number of things that should be done before the show even starts, including setting trade show goals, understanding your company, and developing good trade show introductions. It will then look at trade show etiquette and skills emphasizing active listening, body language and questioning. A special emphasis will be placed on conducting prospecting. The workshop will end with an exploration of the follow-up necessary after the show. This course will highlight basic skills that should allow you to generate more leads, prospects and especially qualified prospects at your next trade show.

### Learning Objectives

- Understand the types of people that attend trade shows
- Develop trade show goals, which are S.M.A.R.T. - Specific, Measurable, Achievable, Relevant and Time-bound
- Know what your company does (products, marketing strategy, your customers) in order to work successfully in the trade show booth
- Realize the importance of good conversation from the opening lines of introduction to the closing of the conversation, hopefully with a potential sale
- Develop a variety of introductions that could be used to engage potential customers at a trade show
- Understand the importance of Pre-Promotion to the success of the trade show
- Realize the importance of targeted promotional giveaways
- Understand the importance of good booth behavior including Active Listening, Body Language, and Questioning.
- Conduct prospecting activities at a trade show, including First Contact, Qualification, Determining Needs, and Closing the Deal
- Develop and conduct follow-up activities with leads, prospects, and qualified prospects after the trade show

### Course Outline

- |                               |                                   |
|-------------------------------|-----------------------------------|
| 1. Session 1: Course Overview | 2. Session 2: Lay of the Land     |
| Learning Objectives           | Attendees                         |
| Pre-Assignment                | Why Do People Attend Trade Shows? |
| Pre-Course Assessment         | Who Attends Trade Shows?          |

- Attendee Exercise
3. Session 3: Setting Trade Show Goals
    - Knowing Why You Are There – It Matters!
    - Goals
    - Self-Reflection Process to Determine Trade Show Goals
  4. Session 4: Before the Trade Show
    - Know What Your Company Does
    - Making a Good Impression
    - Introductions
    - Promotions
    - Show Promotions and Giveaways
  5. Session 5: During the Trade Show
    - Basic Trade Show Etiquette
    - Active Listening
    - Reading Cues
    - Demonstrating Listening
    - Tips for Becoming a Better Listener
    - Body Language Basics
    - Asking Questions
    - Probing Techniques
  6. Session 6: Prospecting
    - Paraphrasing Techniques
    - Echoing Techniques
    - Qualification
    - Determining Needs
    - Closing the Deal
    - Choose a Role
    - Other Things To Do While At the Show
  7. Session 7: After the Show
    - Post-Show Process
    - Following Up On Leads
    - Following Up on Prospects
    - Following up on Qualified Prospects
  8. A Personal Action Plan
    - Starting Point
    - Where I Want to Go
    - How I Will Get There
  9. Course Summary
  10. Recommended Reading List
  11. Post-Course Assessment



## Training Staff on Food Handling

### *Course Overview*

This course reviews how to train staff in food safety principles, including what to teach and how to train workers effectively.

### *Learning Objectives*

- Recognize the importance of training and continual education.
- Recognize when additional training may be needed for workers.
- Identify critical food safety principles that all workers must understand.
- Understand a variety of training methods, along with their pros and cons.
- Understand the general steps to creating a food safety training program.

### *Course Outline*

- |                                 |                                       |
|---------------------------------|---------------------------------------|
| 1. Session One: Course Overview | Record Keeping                        |
| Learning Objectives             | Critical Food Safety Principles       |
| Reflection                      | 3. Session Three: Training Techniques |
| Pre-Course Assessment           | Ways of Training                      |
| 2. Session Two: Training Topics | Developing Training Programs          |
| Importance of Training          | Designing a Food Training Program     |
| Why is Food Safety Important?   | 4. Personal Action Plan               |
| Initial Training                | 5. Course Summary                     |
| Retraining                      | 6. Recommended Reading List           |
|                                 | 7. Post-Course Assessment             |

## Training with Visual Storytelling

### Course Overview

Consider training programs that you have taken in the past. Did the skills that you learned benefit your organization? Did they help you do a better job? Did you even take anything beneficial away from the training at all? A training needs analysis can help your participants answer “yes” to all of these questions, and make sure that their time (and their organization’s money) is well spent.

### Learning Objectives

- Describe how storyboarding leads to better training results
- Apply storyboarding techniques to create a strong foundation for training
- Design training that uses storytelling to make it memorable, compelling, and relevant to the audience
- Evaluate technology tools to determine what will create the best learning experiences needed for adequate training

### Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                                | Sample Storyboarding Form                   |
| Learning Objectives  | Additional Approaches                       |
| Pre-Assignment   | Storyboarding with Apps                     |
| Pre-Course Assessment  | Choosing the Right Tools                    |
| 2. Session Two: How Storytelling Can Boost Your Training Power | Sample Tools                                |
| Setting the Stage  | Collaborating with Others                   |
| Pre-Assignment Review  | Animated Presentations                      |
| 3. Session Three: The Elements of a Powerful Story             | 5. Session Five: Bringing the Story to Life |
| Identifying Your Audience                                      | Graphic Design 101                          |
| Choosing the Right Channels                                    | The Purpose of Good Design                  |
| Connecting with the Audience                                   | Signal vs. Noise                            |
| What Is In It For Me?  | Turning Down the Noise                      |
| Making Connections   | Going Beyond the Basics                     |
| Defining the Story’s Purpose                                   | Conceptual Images                           |
| The Persuasive Story Pattern                                   | Data Overload                               |
| Developing the Story’s Content                                 | Choosing the Right Medium for Your Message  |
| Using Storyboards to Develop Content                           | ACME Case Study                             |
| Creating a Catalog   | Being Presentable                           |
| Case Study   | Practice Makes Perfect                      |
| 4. Session Four: Storyboarding Techniques                      | Avoid the Rush                              |
| Storyboarding the Old-Fashioned Way                            | Practice on Camera in Slide Show Mode       |
|  | Be Deliberate About Being Memorable         |

- 6. Session Six: Tools and Technology
  - Software Tools
  - eLearning Approaches
  - Gamification
  - Relying on Technology

- Making Connections
- 7. Personal Action Plan
- 8. Recommended Reading List
- 9. Post-Course Assessment
- 10. Course Summary

# Transgender Employees: Creating an Inclusive Work Community

## Course Overview

A safe, inclusive workplace in many jurisdictions is not just the law; it is a goal of every employee and company that values the contributions, well-being, and productivity of everyone in the organization. In society today, individuals are of many personal communities. In addition to heterosexual or 'straight' there is also LGBTQ2 – Lesbian, Gay, Bisexual, Transgendered, Queer, and 2, for two-spirited: an aboriginal concept of two sexualities within one body. 'Trans', however, refers to gender identity, whereas the other terms describe sexual orientation. The importance of understanding terms of identification is critical to creating and maintaining a safe workplace.

Transgender Employees: Creating an Inclusive Community is a course to introduce the importance and elements of safe inclusive workspaces for transgendered persons – those identifying as one gender but born into the body of the opposing gender. This course will offer an introduction to terminology, elements, policies, and resources to build and sustain a safe, inclusive environment for transgendered employees and increase the comfort level and productivity of all in your organization.

## Learning Objectives

- Understand the importance and history of inclusivity in the workplace
- Increase your understanding of the transgendered experience
- Explore and address personal and societal biases, misconceptions, and choices
- Identify and implement elements to support a safe inclusive workplace

## Course Outline

- |   |                                   |
|---|-----------------------------------|
| 1. Session 1: Course Overview                                 | Challenging Prejudice             |
| Learning Objectives   | Naming the Problem                |
| Pre-Assignment  | Challenging the Problem           |
| Pre-Course Assessment   | Why Do This?                      |
| 2. Session 2: Overview of Transgender People in the Workplace | Making Connections                |
| Introduction  | 4. Session 4: Power of Language   |
| Pre-Assignment Review   | Power of Language                 |
| Making Connections  | Pronouns                          |
| Importance of Transgender Inclusivity                         | Gender Identity                   |
| History of Transgender in the Workplace                       | 5. Session 5: Safe Spaces         |
| Inviting Transgender Inclusivity                              | Setting a Goal for Safe Spaces    |
| 3. Session 3: Beliefs and Attitudes                           | Verbal and Emotional Environment  |
| Know Your Bias  | Physical Environment              |
| Own Your Reality  | 6. Session 6: Inclusive Community |
| Making Connections  | Inclusive Community               |
|   | Being an Ally                     |

Elements of an Ally  
Steps and Progress  
7. Session 7: Resource Location and  
Development  
Importance of Resources  
Internal Resources  
Workplace Human Rights Policy  
Guiding Principles and Values

Policy Roadmap  
8. A Personal Action Plan  
Starting Point  
Where I Want to Go  
How I Will Get There  
9. Course Summary  
10. Recommended Reading List  
11. Post-Course Assessment

## Unconscious Bias

### Course Overview

Unconscious bias can lead to decisions that unfairly discriminate against individuals and can negatively affect workplace culture, reputation and bottom line. Identifying and reducing unconscious bias improves quality of life, both personal and professional.

### Learning Objectives

- Define and understand unconscious bias
- Understand the importance of acknowledging and addressing unconscious bias in workplace and personal settings
- Identify potential biases in personal and workplace settings
- Engage the Five Rs of reducing unconscious bias
- Develop plans and policies to reduce personal and workplace unconscious biases

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview           | Exploration                               |
| Learning Objectives                       |   |
| Pre-Assignment                            | 5. Session Five: Reducing Personal        |
| Pre-Course Assessment                     | Unconscious Bias                          |
|   | Creating a Plan                           |
| 2. Session Two: Defining Unconscious Bias | Objectives                                |
| What is Unconscious Bias?                 | Ingredients of an Objective               |
| Self-Examination of Unconscious Bias      | Choosing Words Carefully                  |
| The Science of BIAS                       | Writing Learning Objectives               |
| Examining Your Schema                     | 6. Session Six: Identifying Workplace     |
| Unconscious Bias and Our World            | Unconscious Bias                          |
| 3. Session Three: Addressing Unconscious  | Recruiting and Hiring                     |
| Bias                                      | The Interview Activity                    |
| Owning Unconscious Bias                   | New Versus Familiar                       |
| Unconscious Bias as a Tool                | Sweating the Small Stuff                  |
| Five Rs of Reducing Unconscious Bias      | Examining Micro-inequities                |
| Exploring the Five Rs                     | Reversing the Process                     |
| Introduction to Needs Assessment          | 7. Session Seven: Reducing Workplace      |
| Examining Unconscious Bias                | Unconscious Bias                          |
| 4. Session Four: Identifying Personal     | Sharing New Information with Adults       |
| Unconscious Bias                          | Andragogy                                 |
| Identifying Personal Unconscious Bias     | Tenets of Adult Education                 |
| The Need for Bias                         | Other Methods of Addressing Unconscious   |
| Touching Bias Today                       | Bias                                      |
| Reflections                               | Evaluation                                |
| A Roadmap for Learning (and Re-learning)  | Sample Impact Evaluation for Participants |
| Finding Our Filters                       | Writing the Plan                          |

- Creating a Workplace Plan
- 8. Personal Action Plan
- 9. Course Summary

- 10. Recommended Reading List
- 11. Post-Course Assessment

# Understanding and Coping with the COVID-19 Pandemic

## Course Overview

The COVID-19 pandemic is affecting people around the world, resulting in health care systems being overwhelmed, people being confined to their homes, restrictions on travel, and the closure of businesses and industries. Because of this, many people are struggling with uncertainty and fear.

## Learning Objectives

- Understand what COVID-19 is and how it spreads
- Know how to protect yourself during this pandemic
- Understand what self-isolation and self-quarantine mean and how to comply
- Know what to do if you become sick
- Learn about psychological reactions to the situation
- Learn ways to manage stress and anxiety caused by the situation
- Learn proper techniques for washing hands, using hand sanitizer, using masks, and cleaning and disinfecting
- Recognize reliable sources of information about the pandemic

## Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                     | What to Do If You Begin Experiencing Symptoms                |
| Learning Objectives                                 |  |
| Pre-Course Assessment                               | How to Self-Isolate/Quarantine If You Live With Other People |
| 2. Session Two: What is COVID-19?                   | How to Care for Someone Else in Self-Isolation               |
| What Is It?   | When Can Self-Isolation or Self-Quarantine End?              |
| Symptoms  | Self-Isolation and Self-Quarantine                           |
| What is a Pandemic?                                 |  |
| Activity: Symptoms                                  | 5. Session Five: What to Do if You are Sick If You are Sick  |
| How COVID-19 Spreads                                | 6. Session Six: Mental Wellness During the COVID-19 Pandemic |
| 3. Session Three: How to Protect Yourself           | Psychological Reactions                                      |
| How to Protect Yourself                             | Sources of Stress  |
| Protective Measures of Covid-19                     | What You Might be Feeling                                    |
| Social Distancing                                   | Combatting Stigma  |
| 4. Session Four: Self-Isolation and Self-Quarantine | Managing Stress and Anxiety                                  |
| Definitions   | How to Help Children Cope                                    |
| Who Needs to  | Warning Signs  |
| Self-Isolate/Self-Quarantine?                       | Ideas for Managing Stress and Anxiety                        |
| How Long Is the Self-Isolation/Quarantine Period?   | Create a Plan  |
| How to Self-monitor                                 |  |



- 7. Session Seven: Coping With Working From Home
  - Tips For Doing Your Job From Home
  - Ergonomics At Home
  - Best Practices for Sitting
  - Ergonomic Chairs
  - Ergonomic Workstations
  - Monitor, Keyboard and Mouse
  - Tips And Tricks
  - Ergonomic Thinking
- 8. Session Eight: Helpful Tips
  - Proper Handwashing Techniques
  - Proper Handwashing Steps
  - Using Hand Sanitizer
- When and How to Use Masks
- How to Wear a Cloth Face Covering
- Cleaning and Disinfecting When COVID-19 is Present or Suspected
- Surfaces
- Clothing, Towels, Linens and Other Laundry Items
- Links to Trusted Sources of Information
- 9. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 10. Summary
- 11. Post-Course Assessment

## Using Activities to Make Training Fun

### Course Overview

A study of adult educators conducted by Pennsylvania State University doctoral student David Tanis found that playfulness creates a learning environment of “fun, enjoyment, and laughter,” and that their students notice cognitive gains in terms of “engagement, retention, and understanding.”

Ways to incorporate playfulness into the training classroom include the use of games and other activities, along with humor, which will be explored in this course.

Purposeful, well-thought out, and engaging activities in a training course can help learners apply new skills and knowledge, as well as retain that information in a meaningful way, while meeting learning objectives.

### Learning Objectives

- Understand how training can include the use of activities
- Explore different types of games
- Identify methods to elicit participant buy-in
- Apply humor principles in adult learning
- Troubleshoot when activities go badly
- Develop your own activities

### Course Outline

- |   |   |
|---|---|
| 1. Session One: Course Overview                 | Dealing with Reluctant Participants       |
| Learning Objectives                             | 5. Session Five: When Activities Go Badly |
| Pre-Assignment                                  | Troubleshooting Activities                |
| Pre-Course Assessment                           | Difficult Situations                      |
| 2. Session Two: Let's Have Some Fun!            | 6. Session Six: Using Humor in Training   |
| The Four Steps in Experiential Learning         | Tips on Using Humor                       |
| The Principles of Adult Learning                | 7. Session Seven: Balancing Act           |
| Learning How to Drive                           | Balancing Act Activity                    |
| The Value of Games                              | Making Connections                        |
| Tips for Success                                | 8. Session Eight: Quick and Easy Games    |
| Making Connections                              | Why These Games?                          |
| 3. Session Three: Getting Everyone on Board     | Hot Potato                                |
| Getting Buy-In                                  | Passing Introductions                     |
| Learning From the Truly Greats and Big Mistakes | The Orange                                |
| 4. Session Four: Choosing the Right Activity    | 9. Session Nine: Creating a Game          |
| Types of Activities                             | Game Design                               |
| Facilitator Responsibilities                    | Game Design Worksheet                     |
|   | 10. A Personal Action Plan                |
|   | Starting Point                            |

Where I Want to Go  
How I Will Get There  
11. Course Summary

12. Recommended Reading List  
13. Post-Course Assessment

# Vendor Management Essentials

## Course Overview

How well your vendor does their job at the end of the day affects the performance of your business. Having a functional Vendor Management Process that can assess potential suppliers, evaluate current vendors and give metrics for both your company and the vendor to continuously improve can be the difference between success and failure.

## Learning Objectives

- Define what a vendor is and what vendor management entails
- Discuss the benefits and challenges of vendor management
- Differentiate between different types of vendors and outline the effects on potential relationships
- Outline the types of information that needs to be in a vendor management policy
- Set SMART business goals and vendor KPIs
- Define and illustrate a vendor life cycle
- Understand the components of a risk management framework
- Explain various software options for vendor risk management assessment
- Assess and select vendors using questionnaires and checklists
- Scale vendor assessments based on the vendors' risk level
- Utilize a significance of risk rating to determine a potential vendor
- List the components of a vendor contract
- Monitor the performance and relationship of vendors using questionnaires, forms and auditing

## Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                                | Vendor Type: Critical vs Noncritical             |
| Learning Objectives  | Vendor Type: Low Risk vs High Risk               |
| Pre-Assignment   | Vendor Relationship Management                   |
| Pre-Course Assessment  |  |
| 2. Session Two: Vendor Management                              | 5. Session Five: Vendor Management – First Steps |
| Definitions  | Vendor Management Policy Document                |
| Vendor Interaction Phases                                      | Vendor Management Table of Contents              |
| What is Vendor Management?                                     | Business Goal Setting                            |
| 3. Session Three: Benefits and Challenges of Vendor Management | SMART Goals                                      |
| Benefits of Vendor Management                                  | Business Goals                                   |
| Vendor Management Process Benefits                             | Business Goals Related to Vendors                |
| Challenges of Vendor Management                                | Vendor Management – Key Performance Indicators   |
| 4. Session Four: Types of Vendors                              | KPIs and Business Benefits                       |

6. Session Six: Vendor Life Cycle Management
  - Vendor Life Cycle Management
  - Vendor Life Cycles
7. Session Seven: Assessment and Selection of Vendors
  - Vendor Risk Management Framework
  - Outsourcing
  - Vendor Risk Management Software
  - Solutions
  - Assessment and Selection of Vendors
  - RFP Case Study
  - Risk Assessment
  - Step 1: Initial Questionnaire
  - Step 2: Financial, Organizational and Operational Risk Assessment Checklist
  - Step 3: Risk Checklists for Information Technology (IT) Vendors
  - Scaling Your Vendor Assessments
  - Vendor Assessment Audits
  - What to Do With All This Information
8. Session Eight: Developing Contracts and Finalizing Vendors
  - Contract Negotiation
  - The Contract
  - The Monitoring
9. Session Nine: Monitoring Performance and Vendor Relationships
  - Monitoring the Vendor
  - Vendor Evaluation Questionnaire
  - Performance Evaluation Forms
  - Vendor Evaluation Audits
  - Basics of an Audit
  - Identifying, Collecting and Preserving Evidence
  - Questioning Exercise
  - Developing an Audit Checklist
  - Audit Checklist Exercise
  - Conducting the Audit
  - Greenfield Lumber Case Study
  - Audit Role Play
  - Noncompliance and Corrective Action
  - Recording Noncompliances Exercise
  - Taking Corrective Action
  - Corrective Actions Brainstorm
  - End of Relationship or Renewal
10. Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
11. Course Summary
12. Recommended Reading List
13. Post-Course Assessment

## Women and Leadership: Owning Your Strengths and Skills

### Course Overview

Women have played a vital role in the workforce throughout history, serving in positions ranging from front-line workers to visionary founders and leaders. This course examines the influences and barriers that have impacted women's leadership. It also explores the advantages they bring to organizations with their unique strengths.

In this course, you will explore the history of women in the workplace while engaging in personal reflection and skill-building activities designed to identify and strengthen your own leadership skills.

### Learning Objectives

- Understand a brief history and evolution of women and leadership
- Recognize barriers to women's leadership and learn how to overcome them
- Define social and emotional intelligence and explain its importance in workplace leadership
- Demonstrate the value of self-awareness in identifying one's own strengths and skills
- Develop a basic vision and brand for leadership
- Examine steps and skills for good decision-making
- Create your own Philosophy Statement and Action Plan

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview                               | Creating Your Brand                              |
| Learning Objectives   | Making Connections                               |
| Pre-Assignment  | Selling and Screening your Brand                 |
| Pre-Course Assessment   | 7. Session Seven: Leadership Skills              |
| 2. Session Two: Women and the Workforce                       | Identifying Leadership Skills                    |
| Learning from our History                                     | Action Steps                                     |
| Leadership Examined   | 8. Session Eight: Making Good Decisions          |
| 3. Session Three: Barriers and Benefits to Women's Leadership | Ingredients of a Good Decision                   |
| Barriers vs. Benefits   | Decision Wheel Method                            |
| Improving Self-Management through Reflection                  | 9. Session Nine: Creating a Workplace Philosophy |
| 4. Session Four: Social and Emotional Intelligence            | Philosophy Statement                             |
| Defining Emotional Intelligence                               | Building a Plan                                  |
| 5. Session Five: Self-Awareness                               | 10. Personal Action Plan                         |
| Understanding Self-Awareness                                  | 11. Course Summary                               |
| Personal Inventory  | 12. Recommended Reading List                     |
| 6. Session Six: Developing a Brand                            | 13. Post-Course Assessment                       |

## Working Smarter: Using Technology to Your Advantage

### Course Overview

Rudeness in the workplace is increasing to the level that universities are studying it. Everyone is busy, everyone is stressed, and most people take it out on their colleagues at one time or another. We've all been in a situation where we need to print something ASAP and someone has left the printer jammed, or we need coffee and the coffeepot is empty. Technology is supposed to make life easier and simpler, but most managers find themselves cleaning up the messes caused by too many gadgets. This course will show you how to leverage technology to work smarter, not harder.

### Learning Objectives

- Make your workplace a technology-friendly place
- Make the most of computers, telephones, instant messaging, e-mail, contact management applications, and scheduling software
- Communicate better with the IT department
- Make the best software and training choices
- Set an IT budget
- Set expectations and responsibilities for security and privacy
- Keep employees safe and healthy
- Develop and implement a system usage policy
- Implement policies for dealing with company property
- Decide whether or not employees should telecommute
- Make telecommuting work
- Deal with workplace rage
- Address technological issues

### Course Outline

- |   |   |
|---|---|
| 1. Session 1: Course Overview               | Upgrading Software                            |
| Learning Objectives                         | Stretch!                                      |
| Pre-Assignment                              | Staying Focused                               |
| Pre-Course Assessment                       | Case Study                                    |
| 2. Session 2: Technology-Friendly Workplace | Have Fun With It!                             |
| Tips and Tricks                             | 4. Session 4: Communicating with the IT Dept. |
| Tips for Employees                          | Communicating with IT                         |
| Tips for Managers                           | 5. Session 5: Choosing Software Wisely        |
| Ten Easy Ways to Use Technology to Make     | The Three-Step Process                        |
| Work Fun                                    | About Upgrading                               |
| Acme Consulting                             | Upgrading Checklist                           |
| 3. Session 3: Conquering Computers          | Acme Consulting                               |
| Setting Expectations                        |   |

- Case Study: Tom's Options
- Questions
- 6. Session 6: Technical Training
  - Types of Training
  - Training Tip
- 7. Session 7: Setting an IT Budget
  - Budget Basics
  - Step One: Preparing a Draft
  - Costs to Consider
  - Step Two: Looking at Reality
  - Step Three: Finalizing the Budget
  - An Alternative Approach
  - The Shrinking Budget
- 8. Session 8: Security and Privacy
  - An Employee's Rights
  - Doing Your Part
  - An Employer's Rights
- 9. Session 9: Uncontrolled vs. Controlled Networks
  - Two Network Types
  - Uncontrolled Networks
  - Controlled Networks
  - About Restricting Internet Access
- 10. Session 10: Ergonomics
  - What is Ergonomics?
  - Stretch!
- 11. Session 11: System Usage Policies
  - What is a System Usage Policy?
  - Topics to Cover
  - Tips for Success
  - Sample Internet, E-Mail, and Computer Usage Policy
  - Acme Consulting
- 12. Session 12: Taking Care of Company Property
  - Basic Rules of Etiquette
  - The Employee's Role
  - Making Connections
- 13. Session 13: Time-Saving Tools
  - E-Mail Applications
  - Tips and Tricks
  - E-Mail Etiquette
  - A Word about Attachments
  - Scheduling Applications
  - Tips and Tricks
  - Contact Management Applications
- 14. Session 14: Telephone Etiquette
  - Basic Tips
  - Voice Mail
  - Leaving Messages
- 15. Session 15: Instant Messaging
  - Instant Messaging Etiquette
  - Understanding Acronyms
- 16. Session 16: Telecommuting
  - What is Telecommuting?
  - Possible Disadvantages
  - Preparing for Telecommuting
  - Tips and Tricks
  - A Resource Checklist
  - Other Notes
  - To Telecommute or Not to Telecommute
- 17. Session 17: Workplace Rage
  - Preventing Workplace Rage
  - A Manager's Responsibilities
- 18. Session 18: It's Not Working!
  - Introduction
- 19. Session 19: Policies and Procedures
  - Checklist
  - A Policies and Procedures Checklist
- 20. Session 20: A Personal Action Plan
  - Starting Point
  - Where I Want to Go
  - How I Will Get There
- 21. Summary
- 22. Recommended Reading List
- 23. Post-Course Assessment



## Working With the Media: Creating a Positive Working Relationship

### Course Overview

The media is more widespread and pervasive than it's ever been and its reach is growing all the time. Depending on your line of work or hobbies, or just a plain twist of fate, you could end up being the answer part of a question and answer session with a member of the media.

It's easy to become nervous or tongue-tied when being in this situation. Plenty of people get distracted when they consider that what they are saying could very soon be on some news organization's website or Twitter feed.

Being uneasy is perfectly understandable, but you can learn to deal with the media, on a one-off basis, or as a recurring situation. This course will give you the tools you need when dealing with the media and putting your best foot forward without putting your foot in your mouth.

### Learning Objectives

- Prepare for an interview
- Be interviewed successfully
- Craft a media statement
- Develop and issue a press release
- Understand libel and slander
- Develop a media package
- Understand various media outlets
- Build relationships with the media

### Course Outline

- |  |  |
|--|--|
| 1. Session 1: Course Overview                    | Attribution                              |
| Learning Objectives                              | Off the Record                           |
| Pre-Assignment                                   | Confidential                             |
| Pre-Course Assessment                            | Not-for-Attribution                      |
| 2. Session 2: Being Interviewed                  | Different Types of Media                 |
| As a Citizen                                     | Keeping Copies of Interviews             |
| Remain Calm                                      | 4. Session 4: Developing a Media Package |
| Listen to the Question                           | Bios                                     |
| Be Honest  | Company History                          |
| Slander/Libel                                    | Headshots, Logos, Graphics, Stats,       |
| Interview Preparation                            | Video/Audio Clips                        |
| As a Media Spokesperson                          | Contact Details                          |
| 3. Session 3: Providing Information to the Media | 5. Session 5: Press Releases             |
| Security of Information and Files                | Release Information                      |
|  | Contact Information                      |

- |  |                             |
|--|-----------------------------|
| Date of Release                              | 7. A Personal Action Plan   |
| Template                                     | Starting Point              |
| Points of Distribution                       | Where I Want to Go          |
| 6. Session 6: Developing Media Relationships | How I Will Get There        |
| Professional vs. Personal                    | 8. Course Summary           |
| Media Contact Lists                          | 9. Recommended Reading List |
| Providing Tips/Story Ideas to Media          | 10. Post-Course Assessment  |
| Who to Choose                                |                             |

# Workplace Ergonomics for Injury Prevention

## Course Overview

The human body is a fragile system, and we put many demands on it every day. Activities such as reaching to get supplies from a shelf, sitting in front of a computer for hours every day, and moving heavy products around the shop can all take a toll on our bodies. In this course, you will learn how to make your environment as ergonomically friendly as possible in order to make daily tasks easier on your body and mind.

## Learning Objectives

- Define ergonomics and its related terms
- Identify where to obtain ergonomics information for your region
- Describe the basic principles of ergonomics
- Outline ergonomic practices for sitting, standing, lifting, carrying, pushing, and pulling
- Design an ergonomic workstation
- Identify important ergonomic features of tools and machines
- Know why movement is important to prevent injury
- Understand the role that environmental factors (such as sound, air quality, and light) play in ergonomics
- Identify how ergonomics can be incorporated into your workplace
- Assess your environment for ergonomic hazards, create ways to resolve those issues, and plan for implementation
- Review and evaluate your ergonomic efforts

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview                            | To help keep your joints in a neutral position, try to... |
| Learning Objectives  | Best Practices for Sitting                                |
| Pre-Assignment   | Ergonomic Chairs  |
| Pre-Course Assessment                                      |   |
| 2. Session Two: Getting Started                            | Best Practices for Standing                               |
| What is Ergonomics?  | The Best of Both Worlds                                   |
| In The Case for Ergonomics                                 | Lifting Safely  |
| Story Time   | Guidelines for Safe Lifting                               |
| Legislation and Regulatory Bodies                          | Ergonomic Workstations                                    |
| 3. Session Three: The Role of Ergonomics in Your Workplace | Monitor, Keyboard and Mouse                               |
| An Approach for Everyone                                   | Safe Tool Selection and Use                               |
| Case Study: Which Approach?                                | Tool Design   |
| 4. Session Four: Basic Ergonomic Principles                | 5. Session Five: Increasing Movement to Prevent Injury    |
| The Human Body is Part Machine...                          | Increasing Your Movement                                  |
| ...And Part Human!   | Workstation Stretches                                     |

6. Session Six: Creating an Ergonomic Environment
  - See the Light!
  - Watch Out!
  - Breathe the Air!
  - Hear the Sounds!
  - Acceptable Noise Levels
  - Which is Loudest?
  - Curbing Noise in Your Environment
  - Using White Noise
  - Possible Hazards
7. Session Seven: Identifying and Assessing Ergonomic Hazards
  - The Ergonomic Assessment Cycle
  - How to Identify Ergonomic Hazards
  - An Assessment Toolkit
  - Case Study
8. Session Eight: Identifying and Implementing Solutions
  - Three Key Methods
  - Where to Find Ideas?
  - Searching for Information
9. Session Nine: Successful Implementation
  - Tips for Successful Implementation
  - Reviewing Your Ergonomics Program
10. Session Ten: Bringing It All Together
  - A Day in the Life at the Acme Widget Company
  - Answer Key
11. Personal Action Plan
12. Course Summary
13. Recommended Reading List
14. Post-Course Assessment

## Workplace Health and Safety: The Supervisor's Role and Responsibilities

### Course Overview

As a supervisor, you are responsible for ensuring your employees are healthy and safe while at work. Learn how this can be accomplished, through exploring the rights and responsibilities of supervisors and workers.

### Learning Objectives

- Understand the employer's responsibility to display due diligence for organizational health and safety
- Know and understand the three rights of workers
- Identify the responsibilities and roles of supervisors and workers in organizational health and safety
- Realize the role of the Health and Safety Committee in organizational health and safety
- Identify the responsibilities of supervisors and workers in hazard identification, assessment and control, safety and health inspections, and accident reporting and investigation
- Create an employee orientation checklist
- List the necessary health and safety training for employees
- Understand the importance of communicating health and safety information

### Course Outline

- |   |  |
|---|--|
| 1. Session One: Course Overview             | HSC Co-Chairs                            |
| Learning Objectives                         | Suggestions for Holding an HSC Meeting   |
| Pre-Assignment                              | 6. Session Six: Hazard Identification,   |
| Pre-Course Assessment                       | Assessment, and Control                  |
| 2. Session Two: Workplace Health and Safety | Responsibilities                         |
| Experience                                  | Safety and Health Inspections            |
| Due Diligence                               | 6S                                       |
| Health and Safety Policy Statement          | Safety Audit                             |
| 3. Session Three: Worker Rights             | 7. Session Seven: Employee Competency    |
| Three Rights of Workers                     | Employee Orientation                     |
| 4. Session Four: Supervisor and Worker      | Training                                 |
| Health and Safety Responsibilities          | 8. Session Eight: Accident Reporting and |
| Health and Safety Responsibilities          | Investigating                            |
| Local Health and Safety Responsibilities    | Accident Reporting                       |
| 5. Session Five: Health and Safety          | Accident Investigation                   |
| Committees (HSC)                            | Why Do We Investigate Incidents?         |
| HSCs  | Investigation Process                    |

- 9. Session Nine: Communicating Health and Safety Information
  - Communication Tools
  - Tips
  - Right-to-Know Information Station

- Summary Exercise
- 10. Personal Action Plan
- 11. Course Summary
- 12. Recommended Reading List
- 13. Post-Course Assessment

# Writing a Business Plan

## Course Overview

This course is designed for business owners and entrepreneurs who are ready to create a business plan. All the essential steps are covered, including drafting the original document; identifying the audience; gathering information; researching; describing product plans; and marketing, sales, and accounting terms. After completing the course, you will be energized and prepared to write your business plan.

## Learning Objectives

- Research and analyze the individual components needed for a business plan
- Apply skills to create a business plan for different audiences, including investors, banks, and other stakeholders
- Explain the purpose and future of your business in easy to understand terms
- Use accounting terms to describe the future for your business
- Describe your marketing, sales, and planning strategies

## Course Outline

- |  |   |
|--|---|
| 1. Session One: Course Overview              | Types of Operations                           |
| Learning Objectives                          | 6. Session Six: Creating a Marketing Strategy |
| Pre-Assignment                               | Introduction to Marketing                     |
| Pre-Course Assessment                        | Analyzing the Competition and the             |
| 2. Session Two: What is a Business Plan For? | Company                                       |
| The Purpose of the Plan                      | Analyzing Distribution Channels               |
| 3. Session Three: A General Business Plan    | Creating a Marketing Plan                     |
| Framework                                    | Sketching Out the Plan                        |
| Creating a Framework                         | Evaluate, Review, and Revise                  |
| Pre-Assignment Review                        | 7. Session Seven: Creating the Sales Plan     |
| Vision and Mission                           | Components of a Sales Plan                    |
| Create a Vision Statement                    | 8. Session Eight: Developing Financial        |
| Create a Mission Statement                   | Projections                                   |
| 4. Session Four: Identifying The Audience    | Accounting Terminology                        |
| Who is the Reader?                           | Generally Accepted Accounting Principles      |
| Defining the Terms                           | (GAAP)  |
| The Rules of Writing                         | Key Reports                                   |
| Making Connections                           | Financial Projections                         |
| 5. Session five: Defining the Company        | 9. Session Nine: Putting it All Together      |
| Identifying a USP                            | Writing the Executive Summary                 |
| Writing a Company Description                | Making a Strong Presentation                  |
| Describing Products and Services             | Making Connections                            |
| Performing a Market Analysis                 | The Finishing Touches                         |
| Developing an Operations Plan                | Working on the Plan                           |

10. A Personal Action Plan  
11. Summary

12. Recommended Reading List  
13. Post-Course Assessment



## Writing for the Web

### Course Overview

Headlines, sub-titles, chunks of content, pictures, video, hyperlinks, menu buttons, and alternative text are all things that you need to keep in mind when writing for the web.

### Learning Objectives

- Apply engaging techniques that draw readers to web pages
- Plan what to write to reflect your web hierarchy
- Create engaging content, including catchy headlines
- Enhance your writing with other forms of media
- Make your writing accessible to a variety of readers

### Course Outline

- |  |  |
|--|--|
| 1. Session One: Course Overview                | Test Your Usability                            |
| Learning Objectives                            | Consider Eye Tracking                          |
| Pre-Assignment                                 | Break Up Content                               |
| Pre-Course Assessment                          | Reviewing and Planning                         |
| 2. Session Two: Getting to Know the Web        | 7. Session Seven: Adding Audio and Video to    |
| Web Writing Is Not The Same!                   | Your Content                                   |
| Pre-Assignment Review                          | The Debate                                     |
| Working with a Designer                        | Pros and Cons                                  |
| It's Work to Influence Others                  | Making Connections                             |
| 3. Session Three: Creating Your Content        | 8. Session Eight: Getting Your Content Noticed |
| Writing Eye-Catching Headlines                 | Standing out in Crowds                         |
| Tips for Creating Great Headlines              | Search Engine Optimization                     |
| Writing Content                                | Some Key Points to Keep in Mind                |
| Presenting Your Message                        | How It Works                                   |
| Writing Goals                                  | Pinging  |
| Making Connections                             | Optimizing Keywords                            |
| Don't Forget to Proofread and Edit             | Keywords, Search Terms, and Tags               |
| 4. Session Four: Writing For Different Mediums | Tips and Tricks                                |
| Writing for Social Media                       | Develop a Search Terms List                    |
| Tips for Various Platforms                     | Balancing SEO and Word Stuffing                |
| 5. Session Five: Testing the Waters            | Making Connections                             |
| Walk the Talk                                  | Sharing your Content                           |
| Writing for the Web Review                     | 9. Personal Action Plan                        |
| 6. Session Six: Deciding What's Fit to Print   | Starting Point                                 |
| What's Getting Read?                           | Where I Want to Go                             |
| Give Them What They Need                       | How I Will Get There                           |

10. Course Summary

11. Recommended Reading List

12. Post-Course Assessment

## Writing Reports and Proposals

### Course Overview

It is essential to understand how to write reports and proposals that get read. We write reports in a range of formats and for a variety of purposes. Whether you need to report on a product analysis, inventory, feasibility studies, or something else, report writing is a skill you will use again and again.

Having a method to prepare these documents will help you be as efficient as possible with the task. This course will build on a solid base of writing skills to present information in formal, informal, and proposal styles.

You should complete Indigenous Education & Training College's Fundamentals of Writing and Business Writing That Works course before taking this course.

### Learning Objectives

- Prepare reports and proposals that inform, persuade, and provide information.
- Review your work so that it is clear, concise, complete, and correct.
- Apply these skills in real work applications.

### Course Outline

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| 1. Session One: Course Overview                   | Arrange Sentences for Emphasis and Clarity  |
| Learning Objectives                               | Keep Sentences Short                        |
| Pre-Assignment                                    | Ensure Modifying Words and Phrases          |
| Pre-Course Assessment                             | Relate to Nouns and Pronouns                |
| 2. Session Two: The Stages of Report Writing      | Use Words Economically                      |
| The Four Stages                                   | 6. Session Six: The Fourth Stage – Revising |
| 3. Session Three: The First Stage – Investigating | Checklist for Success                       |
| Gathering Information                             | Checklist for Revising                      |
| Let's Get Thinking!                               | Spelling Test                               |
| 4. Session Four: The Second Stage – Planning      | 7. Session Seven: Using Headings            |
| Choosing a Report Format                          | Headings and Subheadings                    |
| Formal Report Elements                            | 8. Session Eight: Using Charts and Graphs   |
| Individual Activity                               | Charts and Graphs                           |
| 5. Session Five: The Third Stage – Writing        | How and When to Use Graphics                |
| The Nine Rules                                    | Things to Remember About Graphics           |
| Use Familiar Words                                | 9. Session Nine: The Proposal               |
| Prefer Short, Simple Words                        | The Differences When Writing                |
| Use Concrete Words                                | Proposals                                   |
| Prefer Active to Passive Verbs                    | Tips for Proposal Writing                   |
| Avoid Camouflaged Verbs                           | The 10 Steps of Proposal Writing            |
|   | Writing Exercise                            |
|   | 10. Session Ten: Persuasion                 |

The Persuasion Process  
Designing Your Message  
Other Elements of Persuasion  
Dealing with Tough Questions  
11. Session Eleven: Practical Application  
Practical Application  
12. Session Twelve: Giving Credit  
Citing Sources

Documentation Styles  
Citing Styles  
Entry Components  
13. Personal Action Plan  
14. Course Summary  
15. Recommended Reading List  
16. Post-Course Assessment