



2026 Training Catalog

Talent Development
Solutions



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Training Grants

Many training programs delivered by the College of Lake County qualify for some level of grant funding. If you are interested in exploring access to grant funding to support your training contact your Talent Development representative, or email CorporateTraining@clcillinois.edu or call 847.543.2887.

CURRENT KNOWN SOURCES OF GRANT FUNDING IN 2025 INCLUDE:

- Employer Training Investment Program (ETIP) grant from the Illinois Department of Commerce & Economic Opportunity (IL DCEO).
- Workforce Innovation and Opportunity Act (WIOA) grant administered through the Lake County Workforce Development Department.
- Noncredit Workforce Training Initiative (NWTI) grant administered through College of Lake County's Business Solutions Department.

TDS TRAINING CATALOG OVERVIEW

Welcome to the gateway of excellence in employee training and development with the College of Lake County's Talent Development Services (TDS) department. In the heart of Lake County, Illinois, TDS is dedicated to empowering both public and private enterprises, catering to the diverse spectrum of businesses from small to Fortune 500 organizations.

COMPREHENSIVE TRAINING SOLUTIONS

TDS specializes in offering top-tier employee training, development, and coaching services tailored to meet the unique needs of Lake County employers. Our programs are designed to elevate organizational performance, foster growth, and drive success. Whether you're steering a small business or navigating the challenges of a large corporation, TDS is your strategic partner for workforce enhancement.

FLEXIBLE TRAINING DELIVERY

Cognizing the dynamic nature of modern workplaces, TDS stands out by offering flexible training delivery options. Choose from face-to-face sessions held at your location or a CLC campus, opt for virtual training modules, or embrace a blended approach that combines the best of both worlds. TDS adapts to your preferences, ensuring a seamless integration of learning into your organizational culture.

GLOBAL EXPERTISE AT YOUR FINGERTIPS

At TDS, we believe in the power of diverse perspectives. Our facilitators and coaches bring a wealth of international experience, having worked and traveled around the world, delivering training across various industries. This global perspective enriches our programs, providing your employees with insights that transcend geographical boundaries.

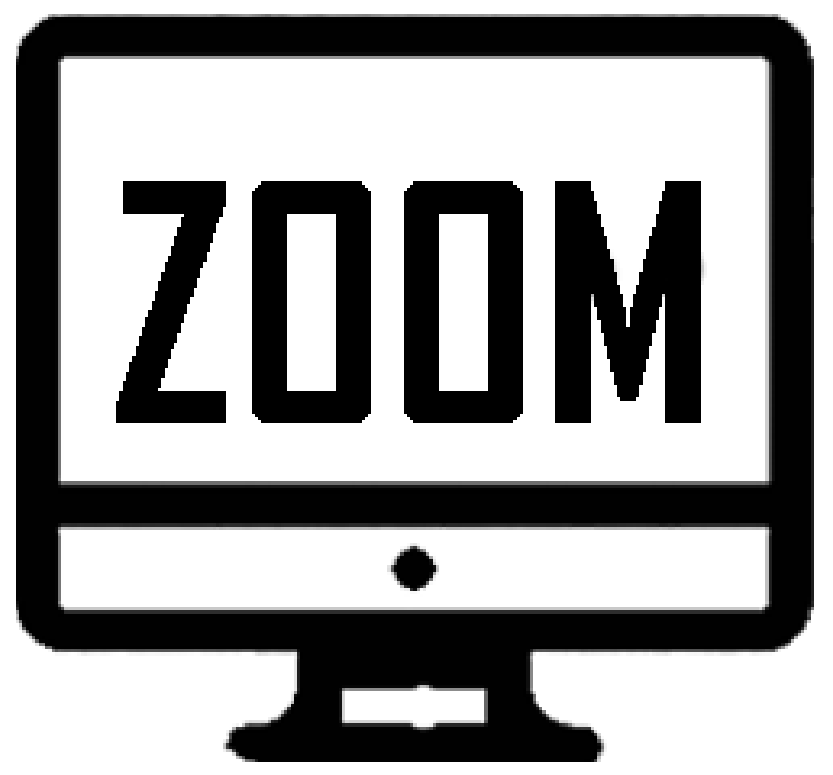
HOLISTIC ORGANIZATIONAL INSIGHTS

TDS goes beyond conventional training by offering comprehensive employee assessments. We help you identify pain points and opportunities within your organization, enabling targeted interventions that yield measurable results. Our assessments serve as a compass, guiding your business towards enhanced efficiency, productivity, and employee satisfaction.

Legend



Icon represents class that is held face-to-face or in a classroom.



Icon represents class that is held virtually via Zoom.



Icon represents the total number of contact hours in the class.



Icon represents the maximum number of participants the class is able to accommodate.

BUSINESS GRAMMAR & PUNCTUATION

The workshop focuses on two processes: Learning the rules and developing an “eagle-eye” to catch errors! Studies have shown that most adults rate their grammar and punctuation skills much higher than they are! Unlike other aspects of writing, grammar and punctuation are strictly rule-based. In this workshop, you’ll learn those rules and apply them in intensive but fun activities.

Objectives

- Identify the most common mistakes in punctuation, grammar, capitalization, spelling, and word usage
- Apply numerous techniques to improve proofreading skills
- Identify and use passive and active voice correctly
- Recognize misplaced modifiers and learn not to use them
- Understand how British English and American English vary in punctuation
- Use correct verb tense and avoid verb agreement errors
- Eliminate “apostrophe abuse” and “comma sprinklers”
- Understand the most typically confused adjective-adverb pairs
- Use pronouns correctly (It is never “Between you and I..”!)
- Eliminate run-on sentences by understanding when to use a semi-colon



BUSINESS WRITING ESSENTIALS

Professionals who can write well are far more valuable to an organization than those whose business writing is confusing and filled with errors. This intensive workshop uses proven techniques to improve writing clarity and brevity.

Objectives

- Identify the reader’s needs and expectations to establish focus
- Organize thoughts by purpose and audience
- Get over writer’s block
- Write with greater clarity, brevity, and directness
- Use words to persuade the reader to take immediate action
- Identify and use parallelism and active voice
- Understand the components of effective email
- Identify common errors in word usage
- Establish a standard company writing format and style
- Craft letters to effectively communicate complaints, bad news, and compliments
- Improve overall readability

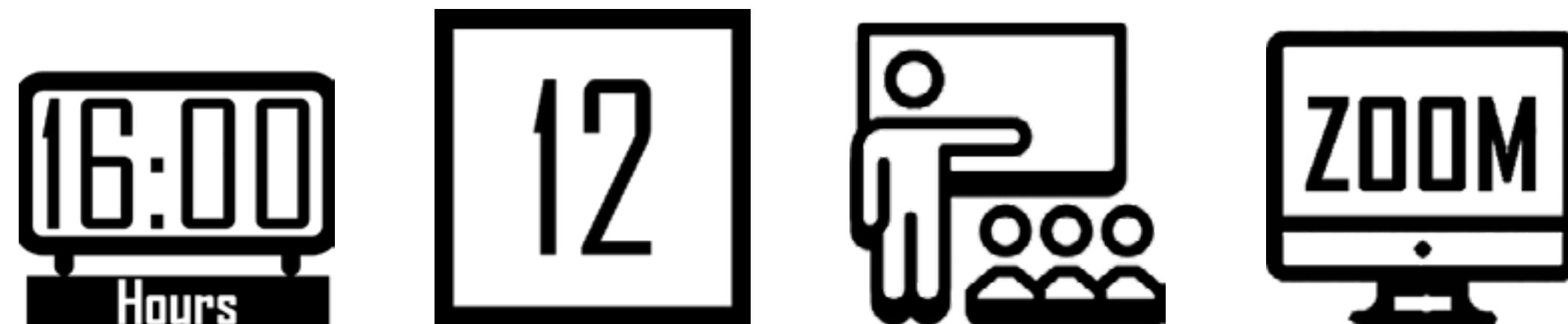


EFFECTIVE COMMUNICATION

Effective Communication is a powerful personal management training program that utilizes a “building-block” technique approach, which when completed, will equip participants with the most comprehensive and applicable interpersonal skills available. This workshop aims to develop skills in managing oneself in interpersonal situations for more productive outcomes. Emphasis is placed on how a person becomes more effective in adapting to a variety of situations and interpersonal styles in creative and productive ways. Participants develop skills in managing relations by learning to take appropriate actions when relating to the four interpersonal styles concerning their interpersonal needs, treatment of time, decision-making, and stress.

Objectives

- 360-degree SOCIAL STYLE and Versatility Assessments
- Learn to choose a productive strategy when communicating with others
- Use skills to influence the behavior of others Realize the needs, expectations, and goals of others
- Become a better observer of other’s behavior
- Understand your preferred SOCIAL STYLE of behavior and its effect on others
- Recognize the strengths and contributions of other people’s SOCIAL STYLE
- Adapt your behavior to establish relationships built on mutual goals that meet individual needs
- Identify each SOCIAL STYLE under stress
- Learn a process to reduce stress behavior
- Apply strategies for improving less-than satisfactory relationships



HOW TO GIVE GREAT PRESENTATIONS

This one-hour session will teach you a “4-3-2” technique to help you create and present a great speech on the spot.

Objectives

- Create well-organized, impressive five minute or less speeches using the “4-3-2” method
- Identify the components of a great speech opening and closing
- Use the basics of delivering a great speech and reduce speech anxiety



IMPROVE YOUR BUSINESS WRITING

This session will teach some techniques you can use to get others to read, understand, enjoy, and agree with your written messages.

Objectives

- Make your documents more concise
- Make your documents more audience-centered
- Make your documents more complete
- Make your documents more correct
- Make your documents more clear



POWERFUL PRESENTATION SKILLS

This workshop is designed to give you the skills needed to deliver impactful presentations that influence people to take action. In this workshop, you will learn to develop great presentations and present both in-person and online. Effective public speaking can distinguish a successful professional from everyone else. Public speaking skills are critical to individual and corporate images. Like any other behaviors, effective presentation skills can be learned and mastered with practice.

Objectives

- Improve public speaking skills and confidence
- Overcome stage fright
- Deliver more effective, dynamic, and confidence-driven presentations
- Create and present the most impactful PowerPoint presentations
- Eliminate poor delivery habits that detract from your message
- Handle challenging questions from your audience
- Connect to your audience to influence and leave a positive, lasting impression
- Command a room with a professional presence
- Be a great impromptu speaker
- Present dynamically in both person or virtually

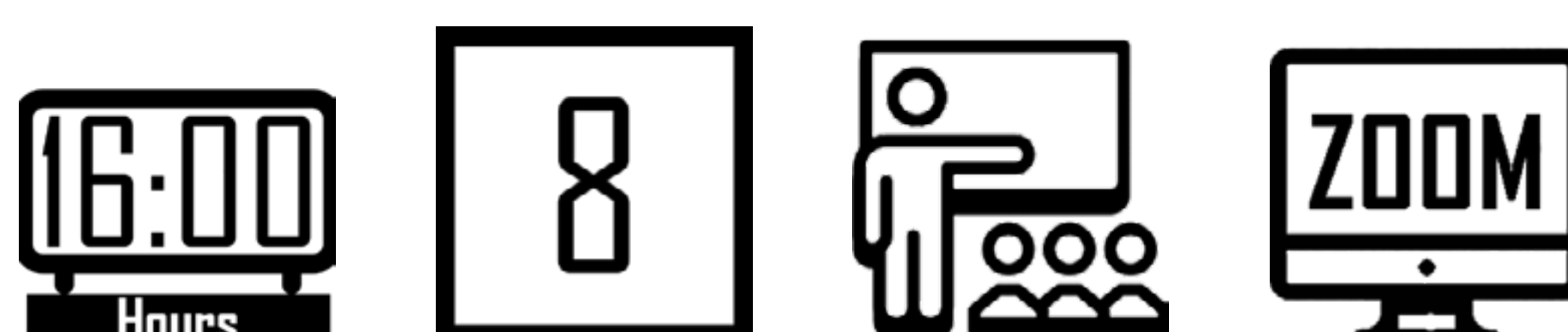


PRESENTATION SKILLS

Regardless of what position you hold in the workplace, effective presentation skills will not only ensure your messages are being delivered and interpreted appropriately, but they can also set you apart from others. However, for many professionals, the thought of presenting to an audience can be nerve-racking and unsettling. This workshop will help you overcome the uneasiness associated with public speaking. You will walk away equipped with verbal communication skills and effective presentation techniques that will enable you to become more confident while speaking face-to-face and virtually.

Objectives

- Identify the symptoms of stage fright and how to control its outward manifestations
- Understand how platform skills compose the most viable and audible component of any presentation.
- Learn how to analyze an audience and prepare your presentation utilizing a five step organizational method
- Learn when and how to incorporate question-and-answer sessions into your presentations
- Demonstrate the proper use and techniques of using visual aids
- Focus on presenting in a virtual setting
- Three videotaped presentations
- Immediate feedback from instructors and fellow attendees



SHARPENING YOUR POINT

“What are you talking about?” How often do you think that when listening to a presentation or reading an email? How often do people think that when trying to understand you?

Organizations are awash in complexity. Often our communication contributes to that.

Complicated communication hurts decision-making and reduces organizational agility.

Sharpening your point provides tools and techniques to simplify your communication. The workshop is based on our “Five-Second Rule”. If a person can’t get your point within five seconds or less, it’s likely to be lost.

The workshop will help you communicate simply, clearly, and directly. Our techniques can be applied across all forms of communication (spoken, written, presented).

Objectives

- Breaking information into understandable and manageable pieces
- Simplifying ideas and messages
- Separating key points and supporting evidence
- Creating simple, easy-to-follow stories and arguments



THAT’S NOT WHAT I MEANT!

How to Improve Your Ability to Understand and Be Understood

Project managers and leaders know that communication is vital to our success in business. You can improve (or aggravate) almost every situation in business and life by how you communicate. The well-crafted message can make the difference between getting sign-off or creating more resistance. It can help us influence despite limited authority or create more obstacles to delivery.

In this highly interactive webinar, Andy Kaufman starts with the standard Sender-Receiver model and shows the breakdowns that often happen as we try to communicate with others. Andy will help you understand the biases that cause misunderstanding and works directly with the audience to walk through real-world scenarios to apply the learning. This is a fun, insightful, motivating webinar that will arm your participants with practical tools to improve their communication. If you’ve ever wondered, “How in the world could they think that?” you’ll benefit from this webinar.

Objectives

- Identify key areas where breakdowns often occur with communication so they can be avoided
- Describe biases that make it more difficult for people to understand each other
- Summarize a 5-part model from neuroscience that can help communication be more effective
- Apply a 5-step process to improve their ability to be understood



TOP TEN GRAMMAR & PUNCTUATION ERRORS SEEN IN BUSINESS WRITING

This one-hour session will review the top 20 grammar and punctuation errors made in business writing and how to avoid them.

Objectives

- Identify common punctuation mistakes that business writers make
- Identify common grammar mistakes that business writers make
- Increase your awareness of the punctuation and grammar mistakes in your writing
- Use tips to remember how to avoid these common mistakes



HOW TO COMMUNICATE ASSERTIVELY NOT AGGRESSIVELY (FULL WORKSHOP)

Gain more confidence, decisiveness, and respect with assertiveness training! Assertiveness allows you to find the balance between not speaking up and speaking up too aggressively. It is important to ask customers, colleagues, subordinates, and superiors to meet your needs and adhere to policies and requirements. However, this must be done with tact and diplomacy and while remaining calm and professional.

Objectives

- Distinguish the difference between assertive, aggressive, and passive behavior
- Make a positive first impression
- Identify and adopt the attitudes that lead to assertiveness versus passivity or aggressiveness
- Learn to say “no” without feeling guilty and without negatively impacting relationships
- Make requests for needs to be met without others feeling imposed upon or offended
- Practice assertive behaviors through verbal, vocal, and visual techniques
- Apply newly learned assertiveness skills to relevant on-the-job situations
- Develop an assertive bill of rights
- Accept negative feedback and provide negative feedback constructively
- Express rights, feelings, and thoughts and not blame others for being insensitive and inconsiderate
- Learn the techniques for assertiveness



TOP TEN WAYS TO IMPROVE YOUR LISTENING

This one-hour session will teach you behaviors that will increase your ability to listen actively.

Objectives

- Understand the purpose of listening
- Use empathy, paraphrasing, encouragers, and other techniques
- Transform “problem” speakers to “problem-solving” speakers



ADVANCED EXCEL FORMULA TECHNIQUES, TIME-SAVING FUNCTIONS AND CHARTING TIPS

Objectives

Rules For Formulas

- Order Of Operations - Basic Functions - The Sum Function, AutoSum Button
- Additional Basic Functions - AVERAGE, MAX, MIN, COUNT

Copying Formulas with Autofill

Relative vs. Absolute References

Calculate with 3-D Formulas

Assign Names to Cells

Use the Insert Function Dialog Box

Statistical Functions - MEDIAN and MODE

Financial Functions - PMT, FV

Date And Time Functions - Serial Value, TODAY, NOW

Logical Functions - IF

Lookup And Reference Functions - VLOOKUP

Text Functions - PROPER, LEFT, RIGHT, CONCAT

Text To Columns

Create Charts

- Define the Components of a Chart
- Format and Modifying Charts
- Add, Edit and Remove Data
- Annotate with Trendlines
- Create a Combination Chart
- Use Sparklines



BECOME AN EXPERT AT SUMMARIZING, MANAGING AND ANALYZING EXCEL DATA

Objectives

Manage Databases

- Set Up a Usable Database
- Sort Data by Single and Multiple Columns
- Sort Data by Row
- Filter for Specific Data Sets
- Custom Filter for Text, Numbers and Dates
- Save A Filter for Re-Use

Use Conditional Formatting for Organization

- Apply Conditional Formatting for Quick Analysis Worksheet
- Sort and Filter using Colors and Icons from Con-

ditional Formatting

Create, View, and Remove Subtotals

Split Complex Data into Separate Columns for Ideal Filtering and Sorting

Working With Tables

- Learn the Benefits of Tables
- Learn Which Features You Cannot Use in a Table
- Create and Modify Tables
- Learn How Tables are Named and Why that is Important
- Add and Delete Data in a Table
- Use Tables to Filter Multiple Lists on a Single
- Calculate Data in a Table
- Use The Table's Total Row
- Find Duplicate Table Data
- Format Tables with Styles
- Use Slicers as A Visual Alternative to Filters
- Converting Tables to Normal Ranges of Data and Why

Summarize Table Data with PivotTables

- Create PivotTables and Modify their Structure
- Filter and Sort Data in a PivotTable
- Change the PivotTable Calculations
- Show Pivoted Data in Terms of Percentages
- Refresh PivotTables Based on Changes to the Original Database
- Group Date Fields to View the Data Over Different Time Periods
- Format A PivotTable
- Drill Down to The Source of Data from a PivotTable
- Use Slicers to Make Filtering a PivotTable More Visual
- Learn the Benefit of Refreshing



CHATGPT AND OFFICE 365

Objectives

Learn What ChatGPT is and How it Works

Overview of Key Features of The Free Version

- Text Generation
- Answering Questions
- Assistance With Brainstorming and Content Creation

Benefits And Limitations of The Free Version

Live Demonstration of Practical Examples:

- Generate Content Ideas and Summaries in Word
- Write Emails Using ChatGPT with Outlook
- Assist with Basic Data Analysis and Functions in Excel
- Create Presentation Outlines for PowerPoint

Tips on Incorporating ChatGPT into Daily Workflows

Enhancing Productivity with Chat-Based Brainstorming



CREATING SMART PRESENTATIONS: INTEGRATING WORD, EXCEL, POWERPOINT

Microsoft Office is known for integration capabilities. We typically work with Excel, Word and PowerPoint individually, and we may insert data from Excel into a Word report or a PowerPoint presentation. Each program has features specific to sharing data automatically among programs. Cathy will show you important time-saving techniques in creating truly presentations; determine when and how to use each type of integration effectively.

Objectives

- Copy and Paste Functionality
- Differentiate Between Linking and Embedding
- Integrate Excel and Word Data into a PowerPoint Presentation
- Link Excel Data and Charts with PowerPoint for Automatic Updating
- Move Excel Data into Word
- Use a Word Outline to Create a New PowerPoint Presentation
- Use Word to Create PowerPoint Speaker Notes and Handouts



DELIVERING SUCCESSFUL AND SMART POWERPOINT PRESENTATIONS

Objectives

Where Do I Start?

A Demo Presentation

Tips and Ideas

- Branching to Other Presentations with a Picture or a Shape
- Using Sections
- Benefits of Using a Template
- Using Fonts
- Use Images
- Use SmartArt to Illustrate Ideas
- Create a Slide Containing Links
- Presentation Tools
- Think Outside the Screen



DELIVERING SUCCESSFUL AND SMART POWERPOINT PRESENTA-

Objectives

Where Do I Start?

A Demo Presentation

Tips and Ideas

- Branching to Other Presentations with a Picture or a Shape
- Using Sections
- Benefits of Using a Template
- Using Fonts
- Use Images
- Use SmartArt to Illustrate Ideas
- Create a Slide Containing Links
- Presentation Tools
- Think Outside the Screen

Integrating Word and Excel into PowerPoint

- Integrate Excel Data and Charts with PowerPoint
- Understand Linking Vs. Embedding Data
- Master Excel Data Integration into Word
- Use Word to Create a New PowerPoint Presentation by Utilizing a Word Outline
- Use Word to Create Customizable PowerPoint Speaker Notes and Handouts
- Use PowerPoint Templates
- Divide A Presentation into Sections
- Saving Slides as Pictures
- Use Animation to Unveil an Object
- Use Slideshow Shortcuts





EXCEL ADVANCED: EXCEL DATA SIMPLIFIED: SORTING AND FILTERING, TABLES, AND PIVOTTABLE MASTERY

Objectives

- Sift Through Data through Sorting and Filtering
- Using Tables to Better Organize Data
- Analyze Data with Subtotals
- Summarizing Data with PivotTables



EXCEL ADVANCED: ANALYTICS AND AUTOMATION

Objectives

- Protect Worksheets and Files
- Link Workbooks with External References
- Consolidate Data
- Use Data Validation
- Record Macros
- Insert Notes and Comments
- Audit Worksheet Data



EXCEL ADVANCED WITH SOPHISTICATED FORMULAS AND PIVOT TABLES

Advanced Excel course focusing on advanced formulas and Pivot Tables.

Objectives

- Naming a Cell or Range of Cells
- Using Named Ranges
- Modifying Named Ranges
- Logical Functions
- Lookup Functions
- Text Functions
- Date Functions
- Creating an Excel PivotTables
- Four Sections of the Pivot Table
- Adding, Removing, and Rearranging Fields in a Pivot Table
- Refresh a Pivot Table
- Changing the Data Source of a PivotTable
- Change the Functions within the Excel Pivot Table
- Change the Number Format of a Field within the Excel Pivot Table
- Add Additional Calculations to a PivotTable
- Change the Calculation to a % of the Grand Total
- Insert a Calculated Field
- Display or Hide Grand Totals
- Display or Hide Subtotals
- Change Report Layout
- Repeat Item Labels
- Insert or Remove Blank Lines
- Group Dates and Numbers
- Create a Manual Grouping
- Ungroup Dates, Times or a Manual Group
- Display Details for a Value Field on a New Worksheet
- Expand and Collapse Levels of Detail
- Use Report Filters
- Show Report Filter Pages for a PivotTable
- Insert, Clear and Format Slicers
- Create a PivotChart
- Change the Chart Type in a PivotChart
- Move a PivotChart
- Modify a PivotChart



EXCEL BASICS - BUILDING A STRONG FOUNDATION

Objectives

- Getting Started with Excel
- Entering Text and Numbers
- Basic Formatting
- Customizing Excel
- Modifying Worksheets
- Entering Excel Formulas



EXCEL DATA ANALYSIS WITH POWERPIVOT

We are now living in the age of big data. Data is being collected all the time and for increasingly detailed transactions. This can lead to an overwhelming amount of data, which brings about a need for people who can analyze large amounts of data quickly. Fortunately, Microsoft® Excel® provides Power Pivot to help you organize, manipulate, and report on your data in the best way possible. Since a tool is only as good as the person using it, it is important to gain a solid understanding of Power Pivot to maximize your effectiveness when analyzing data.

Objectives

- Get started with Power Pivot.
- Visualize Power Pivot data.
- Work with advanced functionality in Power Pivot.

Outline

- Why PivotTables are the hidden gems of Excel
- How to analyze large data sets from different business perspectives
- Create a PivotTable to summarize data
- Make understanding the data easier for others
- Use PivotTables to answer questions about the data
- Analyze patterns in the data
- Customize the summary by grouping data
- Format PivotTables for easy viewing
- Use a chart to view the summary visually



EXCEL DEEP DIVE: ADVANCED TIPS AND TECHNIQUES

Objectives

Audit Workbooks

- Locate Cells Containing Formulas
- Locate Precedent Cells
- Locate Dependent Cells

Calculate with Dates and Times

- Dates are Actually Numbers
- Calculate Duration

Naming Cells

- Create a GoTo Cell
- Use Names in Formulas
- Make Cell References Absolute

Applying Conditional Formatting

- Format Cells Based on Their Values

Quick Start to PivotTables

- Summarize and Analyze Data

Chart Data

- Visualize Data
- Create a Chart with One Keystroke



EXCEL FORMULA FOCUS: THE CORE FUNCTIONS YOU NEED TO KNOW

Objectives

- Learn Many Statistical Functions Including SUM, AVERAGE, MAX, MIN and COUNT
- Use IF and its Counterparts COUNTIF, SUMIF, and AVERAGEIF
- Understand VLOOKUP
- Calculate Dates using TODAY, and NOW
- Learn Many Functions to Manipulate Text Including LEFT, RIGHT, LEN, TRIM and CONCAT

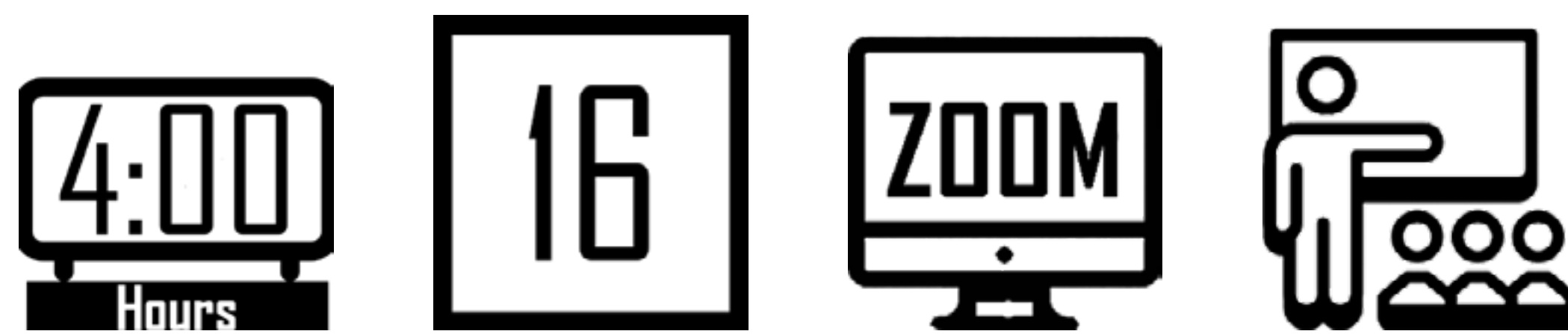


EXCEL FORMULAS FROM BASIC TO ADVANCED

Excel functions can greatly increase your productivity to perform daily task. This course will cover the functions most commonly used so you can enhance your ability to create better performing spreadsheets!

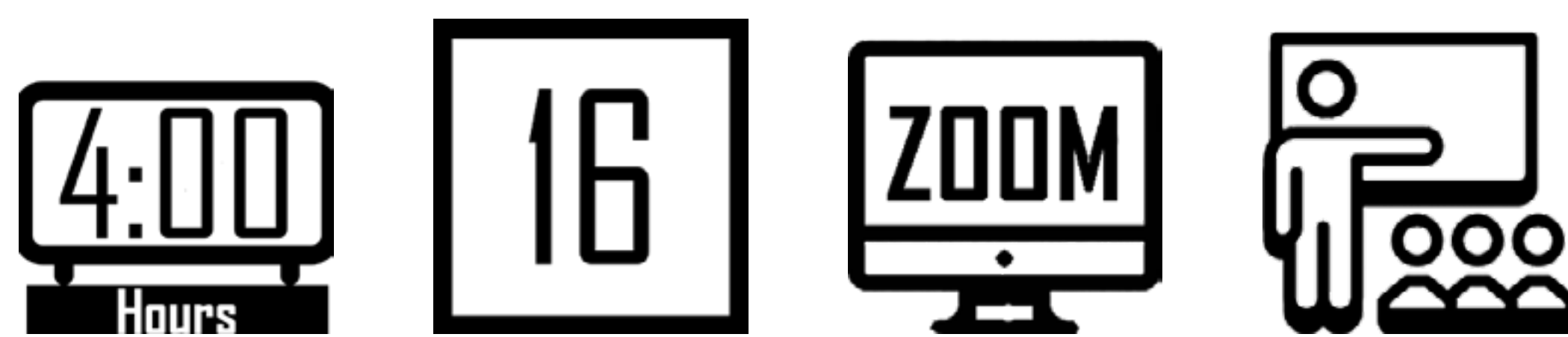
Objectives

- Entering Formulas
- Using the Sum Button
- Orders of Operation in Excel
- Relative VS Absolute Cell Reference in Formulas
- Naming a Cell or Range of Cells
- Using Named Ranges in Formulas
- Modifying Named Ranges
- Text Functions
- Date Functions
- Round Functions
- Logical Functions
- Lookup Functions
- Watch Window
- Evaluate Formula Button



EXCEL FUNDAMENTALS WITH FORMULAS, FORMATTING AND PRINTING

Excel Fundamentals with Formulas, Formatting and Printing will take you from the very beginning of opening a work-book, autofill, formatting, and finish with creating custom headers and footers. It is everything you need to know to get started with Excel.



EXCEL INTERMEDIATE - MASTERING DATA PRESENTATION AND MANAGEMENT

Objectives

- Printing Worksheets
- Using Templates
- Working with Multiple Worksheets
- Applying Conditional Formatting
- Creating Charts



EXCEL INTERMEDIATE WITH TABLES, WORKSHEETS, PROTECTION AND CHARTING

Excel Intermediate with Tables, Worksheets, Protection and Charting continues where you left off with Excel Fundamentals with Formulas, Formatting and Printing. This workshop will expand your Excel knowledge to create tables, rules, tables and much more.

Objectives

- Insert, delete, rename, color, move and copy worksheets
- Use conditional formatting
- Sort columns
- filter and format tables
- Create rules
- Protect workbooks and worksheets
- Convert Text data to column data
- Create subtotals
- Freezing rows and columns
- Work with charts



EXCEL LOOKUP LAB: MASTERING VLOOKUP, MATCH & INDEX

Objectives

- Define Lookup functions
- Understand the Difference Between VLOOKUP and HLOOKUP
- Learn the VLOOKUP Arguments
- Understand the Importance of Absolute References within Lookup Functions
- Use VLOOKUP to Perform Exact Matches and Approximate Matches
- Explore Why VLOOKUP Sometimes Returns #N/A
- Use INDEX and MATCH as an Alternative to VLOOKUP or HLOOKUP



EXCEL MASTERY: IN-DEPTH TIPS AND TRICKS

Objectives

Customize Excel

- Modify the Quick Access Toolbar
- Hide and Display the Ribbons
- Use Push Pins to Access Commonly Used Documents

Tips for Editing

- Navigation Shortcuts
- Select Text with Shift/CTRL
- Lengthen Formula Bar
- Double Click Cells to Edit

Freeze Rows and Columns

- Use Freeze Panes for Viewing
- Use Print Titles for Printing

Utilize Page Layout View

- Insert Headers and Footers

Analyze Data by Sorting and Filtering

- Sort by Single as well as Multiple Columns
- Find Specific Data with Filtering

Use Subtotals to Summarize and Analyze Data

Achieving Basic Formulas

- Rediscover the Rules and Order of Operation
- Use Functions
- View Formulas
- Learn the Difference Between Relative and Absolute Cell References



EXCEL PIVOTTABLES - MASTERING PIVOTTABLES AND DYNAMIC DATA ANALYSIS

Objectives

- Create Subtotals
- Create PivotTables
- Refresh Data in a PivotTable
- Format, Calculate, and Group Data
- Use Slicers to Filter
- Create Custom Calculations
- Use Styles and Style Options
- Learn the Value of Conditional Formatting
- Create a PivotCharts to Visualize Data



EXCEL PIVOTTABLES FOR REAL ESTATE AGENTS AND APPRAISERS – PART 1

Objectives

- Clean Up the MSL Data Once Imported into Excel
- Create PivotTables and Modify their Structure
- Sort And Filter Data in a PivotTable
- Modify PivotTable Calculations
- Show Pivoted Data in Terms of Percentages
- Refresh the PivotTable Based on Changes to the Original Data
- Use The Timeline Feature to View the Data Over Various Time Periods
- Use Slicers to Filter a PivotTable



EXCEL PIVOTTABLES FOR REAL ESTATE AGENTS AND APPRAISERS – PART 2

Objectives

- Expand PivotTable Data into Multiple Sheets
- Group Items into Custom Categories
- Format a PivotTable
- Control the Use of Grand Totals and Subtotals
- Review Layouts for a PivotTable Report
- Learn the Tools in the Show, Actions and PivotTable Groups
- Modify the PivotTable Field List
- Search for Fields in the PivotTable Field List
- Create a PivotChart



EXCEL POWER SKILLS: MASTER FORMULAS, FUNCTIONS AND MACROS

Objectives

Excel's Top 10 Excel Essential Functions

- Statistical Functions - SUM, AVERAGE, MAX, MIN, COUNT
- Logical Functions - IF
- COUNTIF, SUMIF, AVERAGEIF
- Date Functions - TODAY, NOW, NETWORKDAYS
- Text Functions - LEFT, RIGHT, CONCAT, PROPER, TRIM

VLOOKUP, MATCH and INDEX Functions

- What are Lookup Functions?
- Make Cell References Absolute by Naming Cells
- Define VLOOKUP and HLOOKUP
- Break Down the VLOOKUP Arguments
- Use MATCH and INDEX as an Alternative
- Understand MATCH
- Understand INDEX
- Partner MATCH and INDEX
- Use IFNA to Hide #NA Errors

Recording Excel Macros with an Introduction to VBA

- What is a Macro?
- Learn the Types of Macros
- The Importance of Macro Security
- Record a Workbook Macro
- Record a Personal Macro
- Understand the VBA Code
- Edit a Macro
- Ways to Run Macros



EXCEL POWER SKILLS: MASTER FORMULAS, FUNCTIONS AND MACROS

Objectives

Excel's Top 10 Excel Essential Functions

- Learn many Statistical Functions including SUM, AVERAGE, MAX, MIN and COUNT
- Use IF Statements
- Calculate Dates using TODAY, NOW
- Learn Many Functions to Manipulate Text Including LEFT, RIGHT, LEN, TRIM and CONCAT

VLOOKUP, MATCH and INDEX Functions

- Define Lookup Functions
- Understand the Difference Between VLOOKUP and HLOOKUP
- Learn the VLOOKUP Arguments
- Understand the Importance of Absolute Cell References within Many Lookup Functions
- Use VLOOKUP to Perform Exact Matches and Approximate Matches
- Explore Why VLOOKUP Sometimes Returns #N/A
- Use INDEX and MATCH as an Alternative to VLOOKUP or HLOOKUP

Recording Excel Macros with an Introduction to VBA

- Define Macros and Possible Uses
- Learn the Difference between Workbook Macros and Personal Macros
- Make Macros Available to All Workbooks
- Use the Macro Recorder to Create a Macro
- Save a File as a Macro Enabled Excel Workbook
- Run a Macro
- View the Recorded Macro in VBA
- Edit Macros



EXCEL SKILLS ACCELERATOR: PIVOTTABLES, FORMULAS, AND MACRO BASICS

Objectives

PivotTables

- Create a Simple PivotTable
- Change the Way Data is Calculated in a PivotTable
- Group Date Data by Month, Year or Quarter
- Learn About Slicers – a Visual Way to Filter PivotTables
- Format a PivotTable Report for Greater Appeal

Excel's Top Ten Essential Functions

- Learn Many Statistical Functions including SUM, AVERAGE, MAX, MIN and COUNT
- Use IF And its Counterparts COUNTIF, SUMIF, and AVERAGEIF
- Understand VLOOKUP
- Calculate Dates Using TODAY, NOW
- Learn Many Functions to Manipulate Text Once Imported including LEFT, RIGHT, LEN, TRIM and CONCAT

Record Excel Macros with an Introduction to VBA

- Learn the Difference between Workbook Macros and Personal Macros
- Make Macros Available to all Workbooks
- Create macros with the Macro Recorder
- Save A File as a Macro Enabled Excel Workbook
- Run a Macro
- View Recorded Macros in VBA
- Edit Macros



Computer Skills

EXCEL SKILLS UNLOCKED: FORMULAS, SORTING AND FILTERING, PIVOTTABLES, CHARTS, AND DATA PROTECTION

Objectives

Entering Excel Formulas and Functions

- Rules for Formulas
- Order of Operation
- Cell Referencing
- Basic Calculations
- Introducing Functions
- Statistical Functions - SUM, AVERAGE, MAX, MIN, COUNT
- Using Autofill to Copy Formulas
- Relative and Absolute Cell References

Sort and Filter Data

- Sort by a Single Column or by Multiple Columns
- Filter for Specific Data
- Advanced Filtering

Create Charts

- Learn About the Types of Charts
- Create a Chart
- Define the Components of a Chart
- Change the Chart Type
- Switch Data between Columns and Rows
- Change the Chart Style and Layout
- Add Labels
- Learn the Difference between Embedded Charts and Chart Sheets

Summarize Data with PivotTables

- Create PivotTables and Modify their Structure
- Sort and Filter Data in a PivotTable
- Drill down to the Source of Data
- Change the PivotTable Calculations
- Show Pivoted Data in Terms of Percentages
- Refresh the PivotTable Based on Changes in the Original Data

Working with Presentation Elements

- Insert Pictures and ClipArt
- Size and Move Objects
- Change the Orientation
- Enhance Pictures
- Draw Shapes
- Select Objects
- Format Shapes
- Arrange, Align and Group Images

Protecting Worksheets and Files

- Worksheet Level Protection
- Workbook Structure Protection
- File Level Protection



EXPLORING EXCEL'S CONDITIONAL FORMATTING AND DATA VALIDATION TOOLS

Objectives

Use Conditional Formatting

- Understand the Types of Conditional Formats
- Highlight Cells Rules
- Apply Data Bars, Color Scales and Icon Sets
- Remove Conditional Formatting
- Modify Conditional Formatting
- Use The Conditional Formatting Rules Manager
- Create Conditional Formatting Based on a Formula

Use Data Validation

- Use the Data Validation Dialog Box
- Create Data Validation Criteria
- Modify and Remove Data Validation
- Create an Input Message
- Modify the Error Message
- Create a Drop-Down List for Data Entry
- Copy a Drop-Down List to Multiple Columns or Rows



LINKING AND CONSOLIDATING DATA IN EXCEL WORKBOOKS

Objectives

- Create Linked Cells
- Group Worksheets
- Understand 3-D References
- Use 3-D References in Summary Functions
- Name Cells
- Create External Reference Formulas
- Edit Links
- Consolidate Data



MASTERING EXCEL CHARTS AND GRAPHS

Objectives

- Create Charts
- Define the Components of a Chart
- Format a Chart
- Modify a Chart
- Add Chart Elements
- Add, Edit and Remove Data
- Annotate with Trendlines
- Create a Combination Chart
- Use Sparklines



MASTERING EXCEL FORMULAS AND FUNCTIONS

Objectives

Learn the Building Blocks for Formulas

- Rules for Formulas
- Order of Operations

Basic Functions – Sum and AutoSum

Statistical Functions – AVERAGE, MAX, MIN, and COUNT

AutoCalculate

- Copy Formulas using Autofill

Learn the Difference between Relative and Absolute Cell

References

Calculate with 3-D Formula

- Select Multiple Worksheets

Assign Names to Cells

- Name Conventions
- Methods of Naming Cells
- Using The Name Box
- Create Names from Selection
- See All Names with the Name Manager

Enter Additional Functions

- Use the Insert Function Dialog Box
- Use the Formula Ribbon

Statistical Functions - MEDIAN and MODE

Financial Functions – PMT and FV

Date And Time Functions

- Calculate Dates using their Serial Value
- TODAY and NOW Functions

Logical Functions - IF Function

Lookup And Reference Functions - VLOOKUP

Text Functions – PROPER, LEFT, and RIGHT

Text to Columns



MASTERING EXCEL TABLES: SUPERCHARGE YOUR DATABASE SKILLS

Objectives

Set Up a Usable Database

Sort Data by a Single Column, Sort Data by Multiple Columns, and Sort Data by Row

Custom Filter for Text, Numbers and Dates

Save a Filter for Re-Use

Subtotal Data

Learn the Benefits of Tables

- Create and Modify Tables
- Format Tables with Styles
- Learn How Tables Are Named and Why
- Add and Delete Data in a Table
- Calculate Filtered Data in a Table
- Find Duplicate Table Records
- Summarize Table Data with a PivotTable

Creating Charts

- Creating a Chart
- Changing the Size and Position of a Chart
- Changing the Chart Type
- Switching Data
- Changing the Chart Layout and Style
- Adding Labels
- Moving a Chart to a Chart Sheet



RECORDING EXCEL MACROS WITH AN INTRODUCTION TO VBA

Objectives

- Define a Macro
- Learn the types of Macros
- Storage of Macros
- Ways to Run Macros
- Macro Security Settings
- Use the Developer Tab
- Use the Macro Recorder to Create a Macro
- Save a File as a Macro Enabled Excel Workbook
- Run a Macro
- Edit a Macro
- Create a Keyboard Shortcut to Run a Macro
- Make Your Macros Available to All
Your Workbooks



EXCEL: TIPS & TRICKS – LEVEL 1

Objectives

- Customizing Excel
- Navigating a Large Workbook
- Selecting with Shift and CTRL
- Freezing Rows and Columns
- Splitting a Worksheet
- Using Page Layout View for Headers & Footers
- Sorting and Filtering
- Subtotaling
- Using Table Functionality
- Perfecting Basic Formulas



EXCEL: TIPS & TRICKS – LEVEL 2

Objectives

- Perfecting Formulas: Function Library/Autocomplete
- Using 3D Formulas
- Calculating with Dates and Times
- Naming Cells
- IF Statements
- VLookup Formulas
- Charting Data
- Analyzing Data with PivotTables
- Apply Enhanced Conditional Formatting



TRANSFORM DATA INTO INSIGHTS: A BEGINNER'S GUIDE TO EXCEL PIVOTTABLES

Objectives

- Create PivotTables and Modify their Structure
- Sort and Filter Data in a PivotTable
- Change the PivotTable Calculations
- Show Pivoted Data in Terms of Percentages
- Drill Down to the Source of Data from a PivotTable
- Refresh PivotTables Based on Changes to the Original Database
- Use Slicers to Make Filtering a PivotTable More Visual
- Show/Hide Subtotals and Grand Totals



UNDERSTANDING EXCEL'S BASIC FORMULAS AND FUNCTIONS

Objectives

- Learn the Rules for Formulas
- Rediscover the Order of Operation
- Understand Why Cell Referencing is Important
- Discover Basic Calculations
- Be Introduced to Functions and AutoSum
- Use SUM, AVERAGE, MAX, MIN, and COUNT
- Use Autofill to Simplify Data Entry
- Copy Formulas to Other Cells
- Differentiate between Relative and Absolute References



USEFUL MICROSOFT EXCEL TIPS FOR REAL ESTATE AGENTS AND APPRAISERS

Objectives

- Select Data and Navigate a Worksheet
- Format Data and Freeze Panes
- Sort Data
- Filter Data
- Conditionally Format Data
- Calculate the Average and Median
- Calculate the Ratio of Sold Price to Original Price
- Calculate the Price per Square Foot
- Present Data in a Scatter Chart



VISUALIZING EXCEL DATA WITH SMARTART AND CHARTS

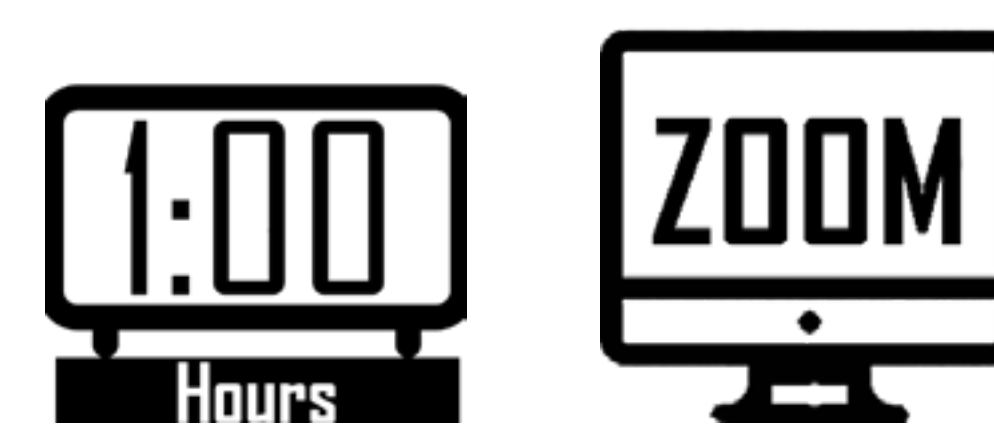
Objectives

Creating SmartArt Diagrams

- Insert Diagrams
- Modify Illustrations
- Format SmartArt
- Convert Bulleted Text into SmartArt

Creating Charts

- Discover the Types of Charts
- Create a Chart
- Learn the Parts of a Chart
- Change the Chart Type
- Switch Data Between Columns and Rows
- Change the Chart Style
- Move a Chart to a Chart Sheet
- Create a Combination Chart



WORKING WITH EXCEL DATABASES – SORT, FILTER, SUBTOTAL AND MORE

Objectives

- Sort Data in a Worksheet
- Filter Data with AutoFilter
- Use Custom Filter Techniques
- Apply Conditional Formatting for Quick Analysis
- Sort And Filter Using Colors and Icons from Conditional Formatting
- Create, View, and Remove Subtotals
- Split Complex Data into Separate Columns for Ideal Filtering and Sorting





INFRASTRUCTURE, SOFTWARE, & COMMUNICATION SERVICES

What does your Business Need?

Consultative services

- General technology assessment
- Security Gap analysis
- Cyber Insurance readiness review
- Cyber Security awareness training
- Email services

Managed email - Microsoft 365 or Google Workspace

- Inbound & outbound message filtering
- Secure email
- Computer services

Endpoint Protection

- System backup
- File folder backup
- Network services

Network firewall & remote access

- Local network discovery and vulnerability scanning
- External network vulnerability scanning
- Website hosting
- Productivity services

Microsoft Office Applications

- File sharing - e.g. Dropbox
- Secure cloud file systems
- VoIP phone services

MICROSOFT: POWER BI

As a business intelligence tool, Power BI offers the team excellent visual analytics capabilities. With the right data and platform, it can be an excellent fit for in your efforts to use data to boost efficiency and productivity within an organization. However, we always encourage how essential it is to experiment with different tools before committing (i.e., purchasing) licenses or long-term contracts.

Requirements

- Each participant should provide their own computer with a minimum 2-cores and 4GB RAM running one of the following versions of Windows: Windows 8 / Windows Server 2008 R2, or later.
- Participants must sign up for Power BI and download Microsoft Power BI Desktop
- Participants must have an internet connection (WiFi or wired)

Objectives

Power BI Desktop

- Accessing Data
- Adding additional data
- Data Preparation
- Renaming tables
- Filling empty values
- Renaming columns
- Using Column from Examples to split columns

Removing unwanted rows

- Transposing data
- Appending queries
- Data Modeling and Exploration
- Layout
- Data Exploration - Slicers, Charts, Cards
- Data Visualization

Power BI Service

- Publishing Report
- Building Dashboard
- Collaboration and Distribution



MICROSOFT TEAMS

Objectives

- Navigate the Teams interface
- Find and join a team
- Manage a team
- Create a team
- Add members to a team
- Change team settings
- Add a channel
- Customize channel notifications
- Work with channels
- View team and channel analytics
- Send a message to a channel
- Create a channel announcement
- Format text
- Reply to a message

- Attach files
- Create a new chat
- Work with chats
- Make a call from a chat
- Answer a call
- Manage call settings
- Schedule a meeting
- Join a meeting
- Change you video background
- Share content in a meeting
- Use a whiteboard
- Record a meeting
- Take meeting notes
- Schedule a live event

- Set a status message
- Understand the Activity feed
- Use @mentions
- Use commands
- Use keyboard shortcuts



MICROSOFT WINDOWS

Microsoft Windows provides the basic knowledge needed to use and perform basic configuration of a computer running Windows; this includes basic operating system features, using and installing apps, managing files and common external devices, using network connections and applications, configuring system settings, and personalizing Windows environment and privacy features.

You will benefit most from this course if you are the primary user of a Windows computer and wish to become proficient with its features, but are not yet a power user or computer technician.

This course assumes you are familiar with using a keyboard and mouse, accessing the internet with a web browser, and other basic aspects of using a modern computer. It does not assume you have used earlier editions of Windows or other specific operating systems, or that you have owned or managed a computer before.

Outline

Chapter 1: Getting started

- Module A: Windows 10 highlights
- Module B: Setting up Windows 10
- Module C: Navigating the interface

Chapter 2: Managing apps

- Module A: Using apps
- Module B: Installing apps

Chapter 3: Files and devices

- Module A: Managing files
- Module B: Folders and locations
- Module C: Common devices

Chapter 4: Internet features

- Module A: Web browsers
- Module B: Internet and cloud apps
- Module C: Network connections

Chapter 5: Computer management

- Module A: Windows settings
- Module B: Accounts and security
- Module C: Updates and maintenance

Chapter 6: Personalization

- Module A: Personalizing the Windows environment
- Module B: Privacy settings



ONENOTE - MADE EASY

Objectives

- Troubleshoot SharePoint errors
- Insert meeting details
- Insert a symbol
- Search for notes
- Keyboard shortcuts
- Apply a background color to the current page
- Protect notes with a password
- Sync notebooks
- Share notebooks
- Convert and solve a math equation
- Insert a table
- Insert an online video
- Edit a picture
- Insert a picture from a file
- Add links
- Insert a check box
- Set paragraph alignment
- Delete, cut, and copy text
- Select text
- Draw precise shapes
- Create a new ink pen
- Print notes
- Record audio notes
- Convert handwriting to text
- Move and resize notes
- Type a note
- Reorder pages
- Add more pages
- Add more sections
- Create a new notebook



ONENOTE - SMART & EFFECTIVE NOTETAKING

OneNote is a digital note-taking app that provides a single place for keeping all of your notes, research, plans, and information — everything you need to remember and manage in your life at home, at work, or at school.

In OneNote, notebooks never run out of paper. Notes are easy to organize, print, and share, and you can search and find important information quickly, even if you forget where you've originally captured it. Best of all, your notebooks are stored online so you can easily get to them on any of your mobile devices.

Objectives

- Notebooks vs Tabs vs Pages in OneNote
- Saving OneNote to the OneDrive
- Share notebooks
- Using the Quick Notes Section
- Organizing Your Notebook
- Use Page Templates
- Inserting a Graphic
- Insert Tables
- Insert Screenshots
- Copying Text from a Picture
- Inserting an Equation or Symbol
- Using Tags ie Insert a check box
- Recording an Audio or Video Clip



OUTLOOK - TEN REALLY COOL FEATURES TO BOOST EFFICIENCY

Objectives

- Use Quick Steps
- Create Building Blocks
- Learn Email Delivery Options
- Create a Contact from an Email
- Schedule Using Natural Phrases
- Automate Signatures
- Use Favorites to Display Folders
- Display Emails as Conversations
- Create Search Folders
- Manage Incoming Mail Alerts



OUTLOOK AND WORD TIPS AND TRICKS

Objectives

Outlook

- Use Quick Steps to Automate Repetitive Actions
- Assign Categories to Emails
- Use the Favorites Folder
- Create Search Folders to Provide a View of All Email Items Matching Specific Criteria
- Automate Signatures
- Use and Create Outlook Templates
- Create an AutoText Entry for Quick Replies
- Increase the Font Size While Reading Mail in Outlook
- Display Emails as Conversations
- Schedule Delivery of An Email and Other Email Options
- Manage Incoming Mail Alerts
- Save An Email as A PDF File
- Drag and Drop an Email to Create A Contact
- Rely on Natural Phrases to Create A Calendar Event
- Go to a Specific Date Quickly
- Save Important Emails, Calendar Events, And Notes as Files on Your Desktop.
- Learn Your Keyboard Shortcuts!

Word

- Use the Quick Access Toolbar and Control Display of Ribbons
- Show Hidden Characters
- Zoom in with CTRL/mouse wheel
- Change the Default Font and Font Size
- Use “Tell Me What You Want to Do”
- Navigate a Long Document
- Select Data Quickly
- Double click to type anywhere
- Delete Words with One Key Press
- Use Find and the Navigation Pane
- Find the Last Edit in a Document
- Clear All Formatting
- Replace Invisible Characters and Formatting
- Create Hyperlinks
- Look Up a Word
- Create Your Own AutoCorrect Settings
- Copy Multiple Items at One Time
- Drag and drop
- Wrap Text around Pictures
- Sort a List
- Insert Symbols
- Insert the Date and Time
- Work with Page Breaks
- Know Your Keyboard Shortcuts



OUTLOOK EMAILING AND CALENDARING TECHNIQUES

If you use Outlook, you know how useful its calendar is for scheduling appointments and meetings. But there's more to the calendar and emails than you might think. This workshop will help you become more efficient and organized in your daily work.

Objectives

- Navigate the platforms
- Create desktop alerts
- Send email at a particular time
- Create contacts from email
- Create and work with folders
- Use quick steps
- Display calendar dates
- Create multiple views
- Create quick appointments
- Export calendar to Excel
- Create Contact groups



OUTLOOK - TIMESAVING TIPS AND TRICKS

Objectives

- View the Outlook Ribbon
- Use the To-Do Bar
- Search for Emails
- Create Virtual Search Folders
- Drag and Drop an Email to Create a Contact
- Share a Contact List
- Learn Calendar Options to Set up Work Hours
- Create and Schedule Meetings
- Learn Basic Use of Follow Up Flags
- Learn Basic Use of Tasks
- Create Recurring Appointments
- Use Quick Steps to Automate Repetitive Actions



OUTLOOK: TIPS & TRICKS

Objectives

- Outlook 2016 Tips and Tricks
- Use Quick Steps to Automate Repetitive Actions
- Assign Categories to Emails
- Use the Favorites Folder
- Create Search Folders to Provide a View of All Email Items Matching Specific Criteria
- Automate Signatures
- Use and Create Outlook Templates
- Create an Autotext Entry for Quick Replies
- Increase the Font Size while Reading Mail in Outlook
- Display Emails as Conversations
- Schedule Delivery of an Email and Other Email Options
- Managing Incoming Mail Alerts
- Automatically File Incoming Mail
- Save and Email as a PDF file
- Drag and Drop an Email to Create a Contact
- Rely on Natural Phrases to Create a Calendar Event
- Go to a Specific Date Quickly
- Save Important Emails, Calendar Events and Notes as Files on your Desktop
- Rely on Sticky Notes for Quick Reminders
- Keyboard Shortcuts



POWERPOINT BASICS

Objectives

- Get Started with PowerPoint
- Create Effective Presentations
- Create New Presentations
- Work with Design Themes
- Format Text
- Work with Presentation Elements
- Prepare to Deliver a Presentation
- Run the Slide Show
- Printing and Layout Options



POWERPOINT INTERMEDIATE/ADVANCED

Objectives

- Adding Tables and Charts to Slides
- Reuse Slides from Other Presentations
- Work with the Slide Master
- Create Hyperlinks
- Create SmartArt Diagrams
- Use Animation
- Add Video and Audio
- Customize a Presentation
- Run the Slideshow





POWERPOINT: TIPS & TRICKS

Objectives

- Learning New Slide Shortcuts
- Re-using Slides from Other Presentations
- Arranging Slides in Slide Sorter view
- Using Built-in Templates
- Modifying Themes
- Inserting Pictures and Screenshots
- Cropping Pictures
- Creating SmartArt Diagrams
- Inserting Hyperlinks
- Linking Charts from Excel
- Using the Animation Painter
- Reordering Animation
- Using Speaker Notes
- Annotating a Presentation
- Creating Custom Shows
- Setting up a Slide Show



SAFE SOCIAL MEDIA FOR SMALL BUSINESSES

Business owners need to balance social media presence with remaining safe from cyber threats. The workshop will help owners protect themselves and their business from social media's dark side.

Objectives

- Learn about biggest social media platforms currently out there and how you can use them to your organization's advantage
- Why we use social media, and the benefits and risks involved with expanding your online presence to improve your business
- The biggest threats that cyber-criminals are currently using to compromise your accounts, your pages, and your business
- How to engage with consumers without sharing too much information with potential cybercriminals on your pages
- How to properly monitor your network and social media accounts



SAFEGUARDING YOUR BUSINESS FROM CYBER HREATS

Is your business safe from cyber-attacks? Cyber-attacks are at an all-time high and every business is at risk. Any size business is vulnerable, no-one is too small or too big. Putting anti-virus on your computer is not sufficient. Learn 4 steps to a more secure business-technology environment.

Objectives

- Learn the 4 steps needed to protect your client and corporate data
- Identify risk your business faces
- Know what data are you responsible for protecting
- Understand where are your most vulnerable data
- Perform a risk assessment
- Identify email attacks
- Choose the tools needed to protect your business



SHAREPOINT: OWNERS

Microsoft® SharePoint® 2016 is a platform designed to facilitate collaboration and allow people to use familiar applications and web-based tools to create, access, store, and track documents and data in a central location. As such, SharePoint has many distinct features that must be enabled and configured, and many content structures that can be selected, added, and configured. In this course, you will learn how to create, configure, and manage a SharePoint team site so that your team or organization can share information and collaborate effectively.

This course is designed for existing Microsoft SharePoint site users who need to create and manage a SharePoint team sit

Outline

Lesson 1: Creating and Configuring a New Site

- Topic A: Create a New Site
- Topic B: Configure the Look and Feel of Your Site

Lesson 2: Adding and Configuring Libraries

- Topic A: Configure a Document Library
- Topic B: Configure Document Versioning and Check Out
- Topic C: Configure a Content Approval Process

Lesson 3: Adding and Configuring Lists

- Topic A: Add and Configure an Announcements List
- Topic B: Add and Configure a Tasks List
- Topic C: Create, Configure, and Integrate Contacts and Calendars

Lesson 4: Creating Custom Lists and Forms

- Topic A: Create and Configure Custom Lists
- Topic B: Create Custom List Forms

Lesson 5: Assigning Permissions and Access Rights

- Topic A: Share Sites and Set Site Permissions
- Topic B: Secure Lists, Libraries, and Documents

Lesson 6: Extending SharePoint Functionality with Web Parts

- Topic A: Add and Configure Included Web Parts
- Topic B: Add and Configure External Web Parts



SHAREPOINT: USERS

In many professional environments today, people work collaboratively in teams. Information technology and applications facilitate this by allowing people to easily share, access, edit, and save information. Microsoft® SharePoint® 2016 is a platform specifically designed to facilitate collaboration, allowing people to use familiar applications and Web-based tools to create, access, store, and track documents and data in a central location. In this course, you will learn about and use a SharePoint Team Site to access, store, and share information and documents.

Who Should Attend

Users who are transitioning to a SharePoint environment, and who need to access information from and collaborate with team members on a Microsoft SharePoint Team Site

Outline

Lesson 1: Interacting with SharePoint Team Sites

- Access SharePoint Sites
- Navigate SharePoint Sites

Lesson 2: Working with Documents, Content, and Libraries

- Upload Documents
- Search for Documents and Content

Lesson 3: Interacting in SharePoint

- Update and Share Your Profile
- Follow and Share Content

Lesson 4: Working with Lists

- Add and Modify List Items
- Configure List Views
- Filter and Group Data with List Views

Lesson 5: Integrating with Microsoft Office

- Access and Save Microsoft Office Documents with SharePoint
- Manage Document Versions
- Work with SharePoint Data from Outlook

STREAMLINING TECHNOLOGY FOR YOUR BUSINESSES

Many small businesses treat technology as an afterthought. In this session you will learn how to be more efficient, secure and effective with software and services designed for SMBs. We will cover business communications, website and ecommerce solutions, business tools and general IT services.

Outline

Business Communication

- Email
- Voice
- SMS
- Chat
- Social Channels

Website Functions

- All sites
- Brochure Sites
- Expanded Site
- Client Portals
- eCommerce

eCommerce Considerations

- Taxes
- Shipping
- Documents & Reporting

Business Management

- Bundled Subscriptions (365, Google Workspace, Zoho)
- Perpetual Licenses
- Accounting Options
- Customer Relationship Management
- Quoting & Invoicing Tools
- Collecting Payments
- Agreements & Signatures
- Inventory & Subscription Management

Information Technology

- Computing
- Networking
- Data Security



WORD BASICS

Objectives

- Get Started with Word
- Work with Text
- Format Text
- Review a Document with the Spelling and Grammar Checkers
- Add Items to a Word Document
- How to Print Documents



WORD INTERMEDIATE

Objectives

- Create Basic Tables
- Add Graphic Objects
- Create Newspaper Columns
- Manage Lists
- Create AutoText Entries
- Format Text Using Styles



STRUCTURING AND MANAGING LARGE DOCUMENTS IN WORD

Objectives

- Navigate within a Document
- Select Parts of a Document
- Review Page Breaks
- Format Using Heading Styles
- Create and Modifying Custom Styles
- Use the Navigation Pane
- Add Headers and Footers
- Work with Section Breaks
- Add Captions
- Add Cross References
- Add Footnotes and Endnotes
- Insert a Table of Content



WORD TIPS AND TRICKS

Objectives

- | | | |
|---|---|--|
| <ul style="list-style-type: none">• Use the Quick Access Toolbar• Hide the Ribbons• Show Hidden Characters• Zoom in with CTRL/mouse wheel• Change the Default Font and Font Size• Use “Tell Me What You Want to Do”• Navigate a Long Document• Select Data Quickly• Double click to type anywhere• Delete Words with One Key Press• Use Find and the Navigation Panel | <ul style="list-style-type: none">• Find the Last Edit in a Document• Clear All Formatting• Replace Invisible Characters and Formatting• Create Hyperlinks• Look Up a Word• Create Your Own AutoCorrect Settings• Copy Multiple Items at One Time• Drag and drop• Wrap Text around Pictures• Sort a List | <ul style="list-style-type: none">• Insert Symbols• Insert the Date and Time• Work with Page Breaks• Know Your Keyboard Shortcuts |
|---|---|--|





VIRTUAL POWER COURSES (60-90 MINUTES)

Enjoy efficient workshops in a live webinar format ranging in timelengths

Course Title	Length
Excel PivotTables for Real Estate Appraisers	60 minutes
Excel: PivotTables to Analyze the MLS for Real Estate Agents and Appraisers - Part 2	60 minutes
Excel: Tips and Tricks for Real Estate Agents and Appraisers	60 minutes
Excel: Consolidating and Linking Data in Excel Workbooks	60 minutes
Excel: Exploring Conditional Formatting and Data Validation	60 minutes
Excel: Recording Macros with an Introduction to VBA	60 minutes
Excel: Understanding Excel's Basic Formulas	60 minutes
Excel: Visualizing Excel Data with SmartArt and Charts	60 minutes
Excel: VLOOKUP, MATCH, and INDEX	60 minutes
Outlook: Ten Really Cool Features to Boost Efficiency	60 minutes
Excel: Analyzing Data with Excel Pivot Tables	75 minutes
Excel: Managing and Analyzing Data with Excel Tables to Excel: Using Tables to Manage Excel Databases	75 minutes
Excel: Mastering Charts	75 minutes
Excel: Top Ten Essential Functions	90 minutes
Excel: Working with Excel DataBases - Sort, Filter, Subtotals & More	90 minutes
PowerPoint: Delivering Successful Presentations	90 minutes
Word: Working with Large Word Documents	90 minutes

BUILDING TRUST IN THE WORKPLACE

According to most recent Gallup Study, 85% of employees are actively disengaged at work. The number one driver of employee engagement is the trust level that they feel with their direct manager. You cannot address disengagement issues without first addressing trust. A transparent culture of learning and development helps create this trust. This workshop will give you essential tools to be transparent in your decision-making by gaining maximum involvement in a way that inspires trust.

Objectives

- 360-Degree SOCIAL STYLE and Versatility Assessments
- Identify areas of concern you have and how to facilitate a productive outcome
- The Life Cycle of Growth Ability Model
- Learn the R3 Process
- Implement the Dynamic Communication Process
- Differences between high and low trust behaviors and the impact of both
- The 4 Cores of Credibility
- The 13 behaviors of high-trust leaders

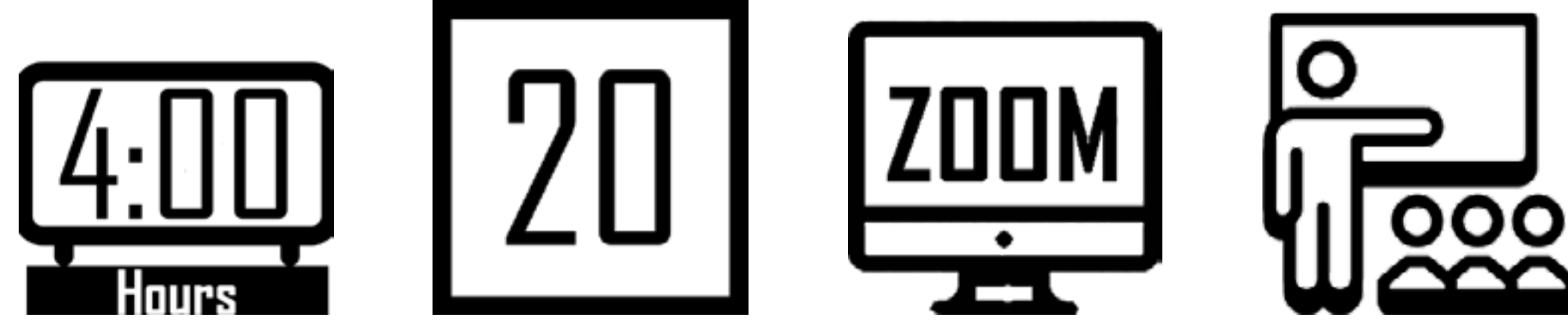


CHANGE MANAGEMENT

Every day, we are faced with differences in opinions, ideas, values, needs, expectations, styles, behaviors, and interests. Each of these differences has the potential for raising a conflict. Conflict can also be attributed to the excess amount of stressors impacting the workplace. Building conflict management skills among teams are important to maintaining a healthy and comfortable work environment. This interactive course provides an opportunity to identify the various sources of conflict within your organization. We then explore conflict management styles and develop your team's skills to effectively manage those sources.

Objectives

- Understanding the Circle of Influence/Circle of Concern Change Model
- Understanding the elements of change
- Understanding how the four dominant styles of behavior handle change
- Team Life Cycle
- Team Assessments
- Creation of a Personal Change Action Plan



CREATING A POSITIVE, MOTIVATING ENVIRONMENT

Loyal, engaged employees produce better business results. Studies show that organizations with highly engaged employees have higher profit margins, greater customer loyalty, and better shareholder value than those whose engagement scores are low. In an employee engagement study conducted in low-turnover organizations in 2012, Gallup found that turnover was 65% lower in highly engaged groups versus groups with low engagement.

Objectives

- Understand morale versus motivation
- Improve productivity for you and your direct reports
- Increase trust, openness, and approachability
- Increase employee commitment, engagement, and energy
- Identify employee motivators and strategize ways to build upon them
- Identify de-motivators and consider strategies to eliminate or minimize them
- Understand why people do what they do
- Appreciate what a manager can do to improve motivation and morale
- Learn the importance of extrinsic versus intrinsic motivations
- Become better team players by collaborating more effectively
- Understand how employee values impact motivation and resistance
- Give feedback in a way that motivates behavior
- Motivate the motivated
- Generate an action plan to implement new behaviors immediately



DEVELOPING EXECUTIVE PRESENCE: LEAD & DELIVER

In this fast-paced, highly interactive course, Andy Kaufman shares practical insights gleaned from years of working with executives around the world. He builds on the idea that executive presence is based on confidence without arrogance. But what about those daunting moments when you don't feel so confident? Through interviews with senior leaders and leading authors and experts, Andy shows how the imposter syndrome is an issue we all struggle with, from aspiring frontline leaders to CEOs (and shares practical ideas on how to address it).

From how we show up, speak up, and deliver results, executive presence is not something we innately have or not--it is something you can develop. This fun, insightful, motivating keynote shows you how.

Objectives

- Define what executive presence is and what must exist for us to trust a leader
- Explain what needs to be in place for people to willingly follow a leader
- Describe what the imposter syndrome is and how to recognize it when they are falling into it
- Explain why many leaders need to increase their assertiveness in order to improve their effectiveness
- Apply the learning to daunting, real world scenarios



DYNAMIC LEADERSHIP WORKSHOP

The workplace today is characterized by constantly changing dynamics. As a result, the workplace and our personal lives have become more behaviorally, educationally, and culturally diverse. Recognizing and developing individual diversity (both at home and in our working environments) is critical to individual effectiveness and organizational and personal productivity. Versatile and responsive leadership and the development of others are imperative for a successful future. This dynamic workshop will introduce tools and strategies to improve your versatility and provide you with practical skills that will help you foster strong relationships, build trust, manage stress and tension, and encourage and guide others.

Objectives

- 360° SOCIAL STYLES and Versatility Assessment
- Understanding and adapting your SOCIAL STYLE
- Managing Styles and Conflict
- The Dynamic Developments Leadership Model
- Setting Performance Goals and Objectives
- Providing Positive and Developmental Feedback
- Performance Analysis and Coaching
- Measuring Team Effectiveness
- Developing a High-Performance Team
- Stress Management Strategies Employee Engagement
- Building Trust
- Effective Communication
- One-on-One follow-up Coaching Sessions



EFFECTIVE INTERVIEWING & HIRING

With the costs of recruitment, salary, benefits, training, and time invested in hiring a new employee, we can't afford to hire just any candidate – we have to hire the right candidate! This course will help you gain new insights for building the right team to allow you to lead and be a successful organization.

Objectives

- Gain insights and practices for preinterview preparation
- Develop job-related questions to assess
- Past performance and comply with equal opportunity employment laws
- Identify key competencies for success in the position
- Practice behavioral-based interviewing Evaluate the information and make quality hiring decisions
- Strategies for identifying high versatility behaviors



EFFECTIVE MEETING MANAGEMENT

Recent surveys have indicated that in the last five years the amount of time we spend in meetings has risen. These surveys have made it apparent that people feel meetings are unproductive and result in a waste of time and resources. This results in longer working hours for everyone involved in the meetings. We will cover the essentials of facilitating effective in-person or virtual meetings, including how to structure the meeting, create a meaningful agenda, and set rules and expectations. This session will provide participants with practical tools to increase the effectiveness and productivity of meetings and encourage team camaraderie and increase productivity.

Objectives

- Assess the effectiveness of your meetings
- Learn to plan and organize meetings to maximize productivity
- Learn to encourage participation - turn passive participants into active participants
- Discover how to conduct meetings to enable you to keep discussions and decision-making on track
- Learn how to increase your effectiveness as a meeting participant
- Identify helpful roles while planning and conducting meetings
- Learn to apply meeting management skills
- Q&A Guidelines
- Meeting Follow-up
- Facilitating Virtual & In-Person Meetings



EFFECTIVE TIME MANAGEMENT

In this workshop, we present a fundamentally different approach to time management. This interactive session will show you ways to manage your time more effectively, focus on activities that yield the greatest results, and organize, prioritize and execute around your goals. During the workshop, participants explore the principles and pitfalls that govern professional and personal efficiency and effectiveness. Through exercises, guided discussion, and a little introspection, participants make their way through a valuable journey toward fulfilling their personal and professional performance capabilities.

Objectives

- Examine the importance of working both efficiently and effectively
- Assess their competency in managing time/self effectively
- Use the “time management matrix” tool to determine how they use their time
- Practice a time/self-management process that balances effectiveness and efficiency
- Discover and apply practical tools and techniques to manage tasks, others, and self resulting in increased productivity, and decreased stress.
- Develop a 30-day commitment plan to apply these new concepts of time/selfmanagement in their professional and personal lives.

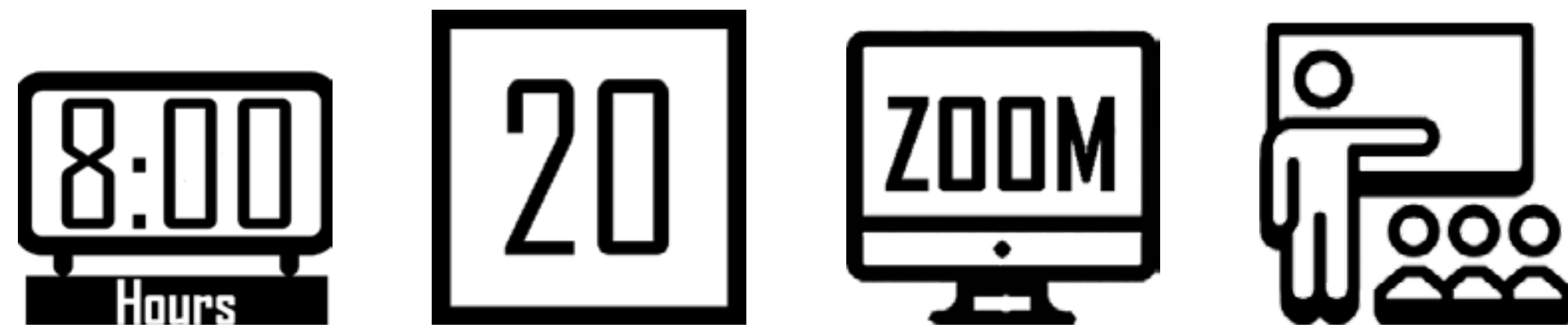


EMPLOYEE ENGAGEMENT

Versatility is a strong predictor of job performance and is comparable to intelligence, education, and personality. This course will share how one can improve their versatility, as well as provide you with practical skills that will help you foster strong relationships, build trust, and encourage and guide others. Leaders play a significant role in influencing employees' level of engagement. Higher engagement leads to greater productivity, customer loyalty, and employee retention. This course will help you understand how to motivate employees, starting with understanding your preferred leadership style and how to better understand the preferences and tendencies of your team members. Upon completing this course, you will have the practical tools you need to increase engagement and promote an inclusive environment within your team.

Objectives

- The Life Cycle of Growth Ability Model Learn the R3 Process for more productive interactions
- Learn how to use The Dynamic Developments Communication Process to provide useful, developmental, and impactful feedback for all behavioral styles and ability levels
- Assessing your team members' behavior styles and how to adapt your style accordingly
- Managing Styles and Conflict
- Providing Positive and Developmental Feedback
- One-on-One Follow-Up Coaching Sessions



GENERATIONAL DIVERSITY

The past years have brought a cascade of social media movements addressing ethnic diversity, gender diversity, and income diversity.

Fortunately, progress is being made to close these gaps.

However, there is a new kind of diversity that only 8% of US companies even recognize.

It is called, “diverse generations on teams.”

They are:

- The Builder Generation (1929-1945)
- The Baby Boomer Generation (1946-1964)
- The Baby Buster Generation or Gen X (1965-1982)
- The Millennial Generation (1983-2000)
- The Generation Z (2001-2015)

For the first time in history, up to five generations find themselves working alongside one another in a typical company. The result? There can be collisions. Interactions among people from different generations can resemble a cross-cultural relationship.

Objectives

- Era they were born
- Life Paradigm or Narrative
- Attitude to Authority
- Market
- How each generation can benefit from each other
- Making the different generations on your team a competitive advantage



HOW TO: TEAM DEVELOPMENT/BUILDING

Relationships are the key to the success of any organization. The more we know about ourselves and others, the better we can avoid pitfalls, leverage our strengths, and move to new levels of team effectiveness. To function as a high-performance team, all members must know and appreciate the strengths and needs of the other team members.

Our interpersonal styles influence the way we plan and organize our work, communicate, and make decisions. In addition, people tend to behave differently in groups than they do as individuals. Along with the effect our interpersonal styles have on a team effort, the interactions among the various members' styles become major factors in a team's success or failure. This program will allow you to identify, explore, and discuss the effects of individual interpersonal styles on your team.

Objectives

- Identify the elements and characteristics of a High-Performance Team
- Discover how teams develop
- Describe the behavior in terms of its relationship to Team Effectiveness
- Learn how to improve Teamwork
- Define your Work Team Balance Sheet
- Measure Team Effectiveness
- Develop a Team Work Action Plan



LEADERSHIP FAST TRACK PROGRAM

Every organization has them. People who are high potentials — those that show the promise of having an even greater influence on the job. Or people in leadership roles need someone to partner with to help them be even more effective. The Leadership Fast Track Program is designed for business professionals who want to accelerate their ability to lead their teams, influence others, and deliver results. We will turbocharge your ability to lead with confidence, take focused action, and achieve the results you desire.

Overview

- Leadership program designed for high-performers and high-potentials
- Classroom or Virtual program
- Customize scheduling to fit your needs

Objectives

- Develop and prepare leaders for even greater levels of influence
- Implement practical tips & tools to lead, build relationships, and influence others in all generations
- Develop leadership capabilities that deliver results
- Apply techniques to manage time, commitments, and engagement
- Learn how to effectively handle conflicts

Workshops

The Leadership Fast Track Program can be customized to include some or all of the below.

- Essentials of Leadership
- Developing Relationships
- Developing your Influence
- Managing Your Time and Commitments
- Dealing with Conflict
- Leading Successful Projects
- Improving Your Ability to Understand and be Understood
- Developing Your Team
- Developing Leaders
- Making Better Decisions for you, your team, and your projects
- Program Wrap-Up



LEADING TEAMS THAT DELIVER

Our success in delivering results often depends on how effectively we collaborate. Yet getting a team of people to truly work in partnership can be a daunting challenge. We're left with the tension: we need our teams to be high performing yet teams are made up of people with varying degrees of knowledge, skills, and commitment. We need our teams focused on delivering a goal, but sometimes egos, personalities, and agendas get in the way. In this highly interactive keynote, Andy Kaufman asks you to think back to one of the best teams you've been a part of in your career thus far. What made it so exceptional? Andy also shares a model that helps you diagnose what's going well with your team and factors holding back team effectiveness. How does your team deal with conflict? Do you see gaps in levels of commitment and trust? Are you looking to better motivate and engage your team? In this keynote, Andy shares practical ideas to help your team move forward in its ability to deliver successful results.

Objectives

- Explain how team leaders are responsible for more than just delivering results: we must also maximize potential.
- Describe a 5-part team model and use it to identify where their team can focus to improve results.
- Describe the difference between cognitive and affective conflict, and why the distinction is critical for high-performing teams.
- Summarize specific strategies to improve their team's ability to lead and deliver.
- Explain specific strategies to engage their team.



LEADING UNDER PRESSURE

Leading today is not for the faint of heart. Most professionals are faced with more work to do than they have time or resources to do it. Most of us face the daily burdens of leading in a stressful and often thankless environment. Yet your roles are so critical! How can you hang in there when burnout seems inevitable? In this session, author and executive coach Andy Kaufman relates lessons learned from interviewing many of today's top experts on leadership. Andy shares why your ability to thrive starts with taking care of yourself. Andy will share an innovative, evidence-based perspective on stress that can help during times of pressure. And he will explain one of the most important and overlooked strategies to help you and your teams when the pressure is on.

Objectives

- Explain why, in times of challenge, sleep, exercise, and diet directly impact our effectiveness under pressure.
- Describe practical strategies to manage interruptions and conflicting priorities.
- Implement practical skills for building relationships, regardless of whether someone is more introverted or extraverted.
- Describe strategies for how to keep from becoming a victim during challenging times.
- Apply evidenced-based approaches to develop a disposition of gratitude.



MANAGING VIRTUAL TEAMS

Virtual teams can outperform groups that are co-located! To succeed, however, virtual collaboration must be managed in specific ways.

Overview

- Identify the unique competencies needed of virtual leaders
- Understand the challenges and advantages of virtual teams
- Apply best practices to build and maintain relationships and rapport within virtual teams
- Manage performance and relationship challenges from a distance
- Communicate effectively across time zones
- Develop trust in virtual teams
- Choose the best technology to support virtual relationships
- Develop effective skills for facilitating team meetings in a virtual environment



MEETING MANAGEMENT

Managing a meeting requires sound planning, effective organizing, making preparations for disruptions, minute-taking, preparing the meeting place, and managing the attendees. The meeting facilitator is a catalyst, coach, coordinator, and more. Like a conductor, the meeting facilitator must bring out the best in individual players and orchestrate successful group efforts. When meetings are effectively run, people are engaged and can generate collaboration, trust, deliverables, commitment, and actions that lead to the desired outcome.

Overview

- Understand the benefits and costs of meetings—know when to have a meeting and when not to
- Identify components of effective and ineffective meetings
- Focus on efficiency and results, keeping the purpose in mind throughout the meeting
- Organize both the content and process
- Make phone and webinar meetings more effective
- Gain insight into choosing the right time & place based on meeting type, attendees & necessary outcomes
- Understand the importance of using all five steps of effective meetings: Planning, starting, focusing, facilitating, and concluding
- Plan and adhere to an agenda
- Chair meetings effectively by dealing with disruptions and professionally handling personality differences
- Start the meeting with the right tone and make ground rules work
- Identify roles in the meeting to increase efficiency
- Keep the meeting focused and on track and get closure on each agenda item
- Facilitate discussions to get participant involvement, show support, resolve conflict, manage differences and make decisions
- Conclude by identifying unfinished business and completing next step action plans
- Ensure informal, and ad hoc meetings are effective and efficient

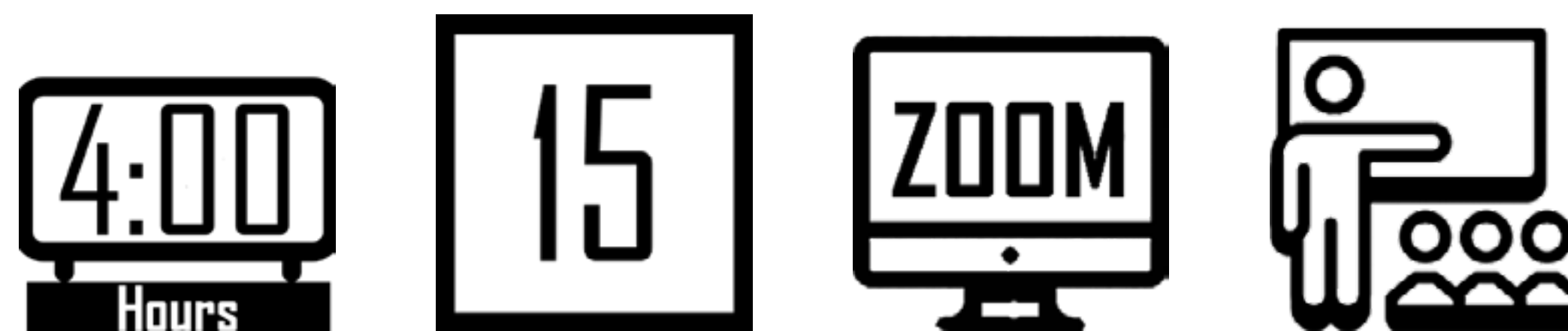


PROJECT PLANNING & DELEGATING

As the success of a business rises, so does the increase in project workload. However, organizations do not always have skilled project managers to handle the demand. This engaging course will help develop the practical skills necessary to successfully lead a team toward setting and achieving goals and deadlines. Leaders will improve their versatility by acknowledging and adapting to the different ability levels and behavioral styles of each team member. The ability to effectively delegate and empower your teams are essential to successful leadership and will increase productivity and improve individual and team morale. Additionally, strong communication is a necessary component for any team, and we will share a communication process that is sure to provide structure and enhance efficiency.

Objectives

- 360-Degree SOCIAL STYLE and Versatility Assessments
- The Dynamic Developments Critical Thinking and Communication Process
- The R3 Interaction Process
- Choosing the right team members for the project
- The Dynamic Developments Leadership Model
- Learn the difference between delegating and “dumping”
- Assess the abilities of team members to determine who and who not to delegate to
- Learn how to delegate properly by understanding the SOCIAL STYLE of your team members
- How to delegate to ensure the best organizational outcome



RETHINKING RESULTS

“What are you talking about?” How often do you think that when listening to a presentation or reading an email? How often do people think that when trying to understand you?

Sharpening your point provides tools and techniques to simplify your communication. The workshop is based on our “Five-Second Rule”. If a person can’t get your point within five seconds or less, it’s likely to be lost.

The workshop will help your team communicate simply, clearly, and directly. Our techniques can be applied across all forms of communication (spoken, written, presented)

Workshop delivered of two days.

Objectives

- Breaking information into understandable and manageable pieces
- Simplifying ideas and messages
- Separating key points and supporting evidence
- Creating simple, easy-to-follow stories and arguments

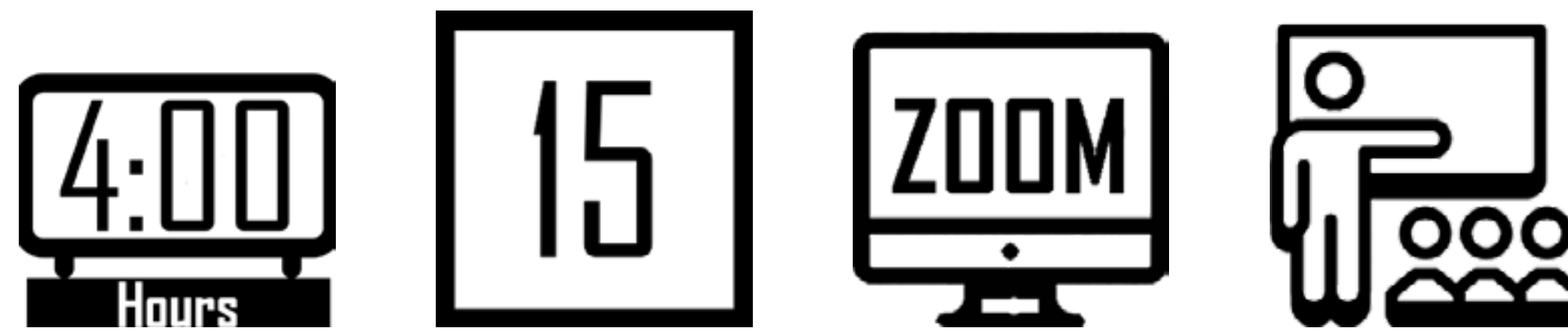


TEAM DEVELOPMENT

Relationships are the key to the success of any organization. The more we know about ourselves and others, the better we can avoid pitfalls, leverage our strengths, and move to new levels of team effectiveness. To function as a high-performance team, all members must know and appreciate the strengths and needs of the other team members. Our interpersonal styles influence the way we plan and organize our work, communicate, and make decisions. In addition, people tend to behave differently in groups than they do as individuals. Along with the effect our interpersonal styles have on a team effort, the interactions among the various members' styles become major factors in a team's success or failure. This program will allow you to identify, explore, and discuss the effects of individual interpersonal styles on your team.

Objectives

- Identify the elements and characteristics of a High-Performance Team
- Discover how teams develop
- Describe the behavior in terms of its relationship to Team Effectiveness
- Learn how to improve Teamwork
- Define your Work Team Balance Sheet
- Measure Team Effectiveness
- Develop a Team Work Action Plan



THE DIRTY LITTLE SECRET OF BUSINESS: IT'S ALL ABOUT RELATIONSHIPS

In this webinar, Andy Kaufman shares “The Dirty Little Secret of Business.” You won’t learn this secret in school, yet it is critical to your success. The secret is simple—it’s all about relationships. Andy describes the key relationships you must develop to advance your projects and career. Discover how understanding different personality types will improve your ability to build rapport, influence people, and control situations. Learn what networking is—and isn’t—and how to increase your networks’ effectiveness with less effort.

Participants of this webinar will know how to answer the questions: How can you deal with difficult people who are obstacles to your ability to deliver? How can you influence someone to align with your priorities even when you don’t have the organizational authority? How can you find time to network when you’re overwhelmed with day-to-day work?

Objectives

- Explain how relationship-building is critical to our careers, regardless of personality type
- Describe the difference between an “inner circle” and a “got to group”, and why both groups are necessary for your success
- Implement practical skills to develop relationships in their company, industry, and beyond
- Describe ways to leverage social media as part of an overall relationship-building strategy



THE EFFECTIVE ADMINISTRATIVE ASSISTANT SERIES

Are you looking for ways to revitalize your work and find a fresh perspective on all that has to be done?

This program will provide you the fundamental tools required for you to be successful. The program is an instructor-led online course to help administrative professionals deliver results in the real world. You will gather online with other assistants for a series of two-hour, highly interactive sessions. By participating online, you minimize your time away from the office.

Great workshop for any administrative Professionals, administrative assistants, executive assistants, office managers, event planners, and receptionist

Objectives

- Communications skills, including listening, questioning and being more assertive
- How to increase your effectiveness in recognizing and managing conflict, as well as dealing with difficult people
- How to influence others even when you don't have authority over them
- How your personality style works to your favor (and might work against you)
- A five-step model for getting things done with less stress
- Easy-to-use templates and tools to successfully deliver projects
- Practical approaches to juggle all that's on your plate



THE FIVE APPROACHES TO MANAGING CONFLICT

Whenever two or more people come together, there is bound to be conflict. Each of us learned early in life how to handle conflict. Some face conflict as a collaborative problem-solving opportunity. For some of us, it may be that we learned to handle conflict by being aggressive, and by protecting our egos. This Conflict Resolution Workshop offers conflict resolution skills and techniques to build stronger organizations and more rewarding relationships.

Objectives

- Understand what conflict is and what conflict resolution is
- Understand the five approaches to conflict resolution: collaborating, competing, compromising, accommodating, avoiding
- Neutralize emotions and set ground rules
- Choose the best time and place
- Create mutual understanding
- Recognize the underlying causes of conflict
- Practice applying models, techniques and strategies to manage communication behaviors in conflict situations
- Explore barriers to conflict management and resolution
- Identify your own feelings and actions in response to conflict
- Distinguish between listening for thoughts and listening for feelings
- Learn how relationship conflict and content conflict are handled differently
- Develop a strategy for handling passive or aggressive behavior
- Decrease defensiveness in self and others
- Apply win-win negotiating methods
- Promote cooperation with co-workers
- Identify how your perception of situations impacts your reactions



THE IMPORTANCE OF UNDERSTANDING THE TWENTY REASONS PEOPLE DON'T DO WHAT YOU WANT THEM TO DO

This one-hour session will review 20 reasons why your employees, co-workers, and managers don't do what you want them to do. Cooperation is an essential tool.



TOP EIGHT SKILLS THAT ALL MANAGERS NEED

This one-hour session will review the eight skills categories that all managers should develop and the specific skills in each category.

Objectives

- Identify leadership skills that you need to develop
- Identify interpersonal skills that you need to develop
- Identify oral and written communication skills that you need to develop
- Identify technical and organizational knowledge that you need to develop
- Identify personal development skills you need to develop
- Identify administrative skills you need to develop



TOP TEN CHARACTERISTICS OF SUCCESSFUL LEADERS

This one-hour session will teach the essential characteristics that a business leader must develop to create followers.

Overview

- Leadership program designed for high-performers and high-potentials
- Classroom or Virtual program
- Customize scheduling to fit your needs



TOP TEN TIPS TO CONDUCT EFFECTIVE MEETINGS

This one-hour session will teach the essential rules to have a virtual and in-person meeting, which are productive and positive.

Objectives

- Plan great meetings
- Begin a meeting correctly
- Facilitate meeting to stay on time, to manage discussions, and to get results
- Receive feedback of “That meeting was a good use of my time”



TOP TEN WAYS TO KEEP YOURSELF AND YOUR STAFF POSITIVE

This session will teach the components to keep ourselves and our team positive—especially during tough times.

Objectives

- Identify the ways individuals differ in terms of staying positive
- Recognize the importance of listening to both the content and emotion
- Increase feelings of control and security in self and others
- Assess value differences and adapt to differences in others



VIRTUAL LEADERSHIP

Technology offers the flexibility for employees to work from the office or remotely. As the amount of remote employees increases, so do the challenges that leaders face when managing virtual teams. In this course, you will discover the behavioral styles of your team members and how that influences the way we organize our work, communicate, and make decisions. Strategies for engaging and motivating team members virtually will be shared, along with tips for navigating technology and the various virtual platforms.

Objectives

- The Life Cycle of Growth Ability Model
- The R3 Process for more productive virtual interactions
- Learn how to use The Dynamic
- Developments Communication process to provide useful, developmental, and impactful virtual feedback for all behavioral styles and ability levels.
- Assessing your team members' virtual behavior style and how to adapt your style accordingly
- Managing Styles and Conflict
- Learn strategies for interpreting nonverbal communication in a virtual setting



BUSINESS ETIQUETTE

Creating a professional, mutually respectful atmosphere enhances communication in the workplace. This course is designed for professionals looking to sharpen their business etiquette skills, addressing topics such as appropriate business attire, making a good first impression, understanding cultural communication differences, crafting business emails, and practicing good virtual etiquette. From sending an email, or mastering your elevator pitch, to attending a formal company banquet, you will leave this course equipped to handle various situations that arise in the workplace.

Objectives

- Appreciate the importance of professional image
- Analyze written communication to create a positive business impact
- Review proper etiquette in social/business settings
- Assess your personal and professional style
- Understanding subject, greeting, and signature etiquette
- Proper practices during a phone call
- Practices in text message content



CALMING THE STORM: HOW TO DEAL LOGICALLY WITH CUSTOMER EMOTION

If customers feel a service was not superior, they might not only stop being your customers, they might even take actions to negatively impact your business with future customers! In fact, on average, disappointed customers discuss their negative experiences with at least 9 people. And if posted on social media, that impact grows greatly and can be devastating.

Ironically, these bad experiences can actually be good news: It's a moment of truth to solidify the customer relationship. That is, research supports most "satisfied" customers don't evolve into "wowed" customers until something goes wrong and you handle it smoothly!

In this four-hour workshop, you will learn practical steps to deal with customer anger, frustration and even belligerence that results in satisfying both you and your customer.

Objectives

- Stay calm, respectful, empathetic and constructive when confronted by frustration, disappointment and anger
- Listen to both content and emotion
- Apply empathy and the Platinum Rule
- Avoid certain words and behaviors which can worsen the situation
- Gain customer trust
- Calm customer emotions as you focus on what you want
- Decrease defensiveness in yourself and the customer
- Modify nonverbal behavior and learn to say "no" to customers so that the relationship stays positive
- Turn problem-making customers into collaborative problem-solving customers



CONFLICT RESOLUTION

Every day, we are faced with differences in opinions, ideas, values, needs, expectations, styles, behaviors, and interests. Each of these differences has the potential for raising a conflict. Conflict can also be attributed to the excess amount of stressors impacting the workplace. Building conflict management skills among teams are important to maintaining a healthy and comfortable work environment. This interactive course provides an opportunity to identify the various sources of conflict within your organization. We then explore conflict management styles and develop your team's skills to effectively manage those sources.

Objectives

- Identify points of tension and conflict among your team
- Discover how to use tension as a positive motivator
- SOCIAL STYLE /Versatility Assessment
- Identify each SOCIAL STYLE under stress
- Learn a process to reduce defensive fight and flight behaviors
- Apply strategies for improving less-than-satisfactory relationships
- Dynamic Developments Communication Process



CRITICAL THINKING AND PROBLEM-SOLVING: THE KEY TO EFFECTIVE DECISION MAKING

Critical thinking is the act of analyzing facts, beliefs and assumptions to understand a problem or topic thoroughly. This workshop teaches how to observe and gather information, ask thoughtful questions and analyze possible solutions.

Objectives

- Understand the essential components of critical thinking and the ideal characteristics of critical thinkers
- Discover a decision-making process that creatively solves problems
- Dissolve the biases and assumptions that affect your ability to think rationally
- Understand the importance of gathering factual information and being open-minded
- Avoid being trapped by “logical fallacies”
- Discover ways to become more inquisitive and analytical
- Overcome obstacles to thinking critically



EMOTIONAL INTELLIGENCE (EQ)

Emotional intelligence includes four parts: self-awareness, self-regulation, empathy, and relationship-building. Someone with high Emotional Intelligence can identify and regulate their emotions as well as effectively identify the emotions of others. We will walk through the steps to developing and increasing your emotional intelligence which will ultimately allow you to build better relationships, reduce team stress and tension, alleviate conflict, and improve productivity. The goal of this course is to provide you with the practical knowledge and skillset necessary to identify and understand the emotions of others.

Objectives

- Learn the core elements of Emotional Intelligence
- Develop self-awareness and self-management of personal emotions
- SOCIAL STYLE assessment
- Become a better observer of other's behavior Understand your preferred SOCIAL STYLE of behavior and its effect on others



GREEN BELT

Why do you need Green Belts?

A Green Belt knows how to fix slow, inflexible, defective, obscure, costly, and risky operations. Our graduates learn not only Six Sigma but also Lean and Deming principles for excellence. Together, these methods teach how to solve problems and stay on top of change.

Our instructor-coaches have worked in Lean Six Sigma programs with IBM, PepsiCo, Johnson & Johnson, Shell, and many medium-sized companies.

This program is designed for anyone who must solve problems at work or past participants of Lean Six Sigma workshops.

Overview

- Certification in as short as one week – you don't have time to waste
- No-nonsense statistics that work where you work – the real world
- Freedom from exam retake fees – we're with you if you need a couple of tries
- 97% certification success rate
- 900 certified Lean Six Sigma Green Belts through 2017
- 9.7/10 participant satisfaction rating since 2009
- Participants MUST supply their own laptop PC with MS Excel 2010 or newer

Prerequisites

- Excel cut/paste formulas, using multiple sheets (basic to intermediate)
- Workplace experience – More than 1-year of professional work experience

Objectives

- The Green Belt body of knowledge in a form that is immediately useful at work
- How to spot and solve problems in teams and individually
- Project management, meeting facilitation, and oral communication skills

Workshops

- Study the Lean Six Sigma body of knowledge at the Green Belt level (LSSGB)
- Get certified – participants may earn the LSSGB certificate granted by the Six Sigma Masters program
- Earn your “belt” by completing a standard project report in class, not just by passing an exam
- Highly experiential – blend of lecture with hands-on work 40/60
- Each participant solves a unique problem in the company case (sales, finance, production, field service)
- Instructors and coaches are certified Lean Six Sigma experts who enjoy teaching



KEEPING YOURSELF POSITIVE AND MOTIVATED

In this one-day workshop you will learn ways to be positive about the past, the present and the future and to be motivated and to be fully engaged and productive in the future. You will identify what you value the most in your personal life and professional life and learn to take actions so that you are living those values. In addition, you will learn techniques to manage your stress and respond to negative people.

Objectives

- Understand the components of being positive, motivated, and productive
- Identify what you can control and change
- Obtain new insights into your work attitudes and values
- Set personal and professional goals based on these values
- Select actions to achieve your goals
- Explore the challenges and solutions of staying positive and goal-oriented
- Recognize the underlying causes of stress and demotivation
- Manage your negative stress levels
- Interact with others to create positive relationships
- Handle negative people and resist being dragged down
- Problem-solve to move forward



NEGOTIATION & CONSULTATIVE SELLING

In today's competitive selling environment, businesses no longer require a "customer vendor" relationship, but rather a strategic relationship with a "business partner". Winning in today's environment requires the ability to continually negotiate with clients, vendors, and colleagues in a way that builds and strengthens relationships. This workshop aims to help sales professionals develop skills to manage themselves in sales situations for more productive outcomes. Emphasis is placed on how a person becomes more effective in adapting to a variety of situations in creative and productive ways. Participants develop skills in managing relationships, using a systematic approach to build ongoing, value-added relationships with their clients, and how to effectively relay their message to any type of communication style.

Objectives

- Differentiate between utilizing a "process" vs. "product" sales approach
- How to be perceived by the client organization as an "added valued" partner
- Demonstrate the use of the "Five I's" questioning model
- Develop implied needs into explicit needs
- Describe the components of the client agreement
- Demonstrate a benefit-oriented solution
- Demonstrate how to handle client objections and concerns
- Define different types of objections Describe how to gain closure
- Describe the characteristics of a professional recommendation
- Theory and stages of negotiation
- Understanding the difference between positions and interests



NETWORKING SKILLS

This workshop aims to help professionals prepare and thrive at networking events. Networking events, whether virtual or in-person, are a key aspect of furthering a person's career. These events help people build connections that can lead to the next job, the newest customer, or the newest mentor. This workshop will give you skills to present yourself in a professional, but friendly way, and help you prepare to best represent yourself to anyone you come in contact with.

Objectives

- How to prepare for a networking event
- How to have quality and meaningful conversations
- What to do during the networking event
- How to follow up after the event



SIX STRATEGIES FOR DEALING WITH DIFFICULT STAKEHOLDERS

Have you ever lost sleep because of a difficult stakeholder? Maybe it was a boss, peer, or someone on the other side of the business. Perhaps it was worry about dealing with them in an upcoming meeting or ruminating about how they are an obstacle to progress on a project. In this session, Andy Kaufman shares six strategies for dealing with difficult stakeholders. There are no simple answers, but these are strategies that Andy has shared with clients worldwide, and you're invited to see which ones you can put into place. After all, you deserve a better night of sleep!

Objectives

- Describe more broadly what a stakeholder is and how managing their expectations is so critical to project success.
- Explain the difference between “keeping stakeholders informed” and “keeping them satisfied.”
- Describe practical strategies to help deal with and influence difficult stakeholders.

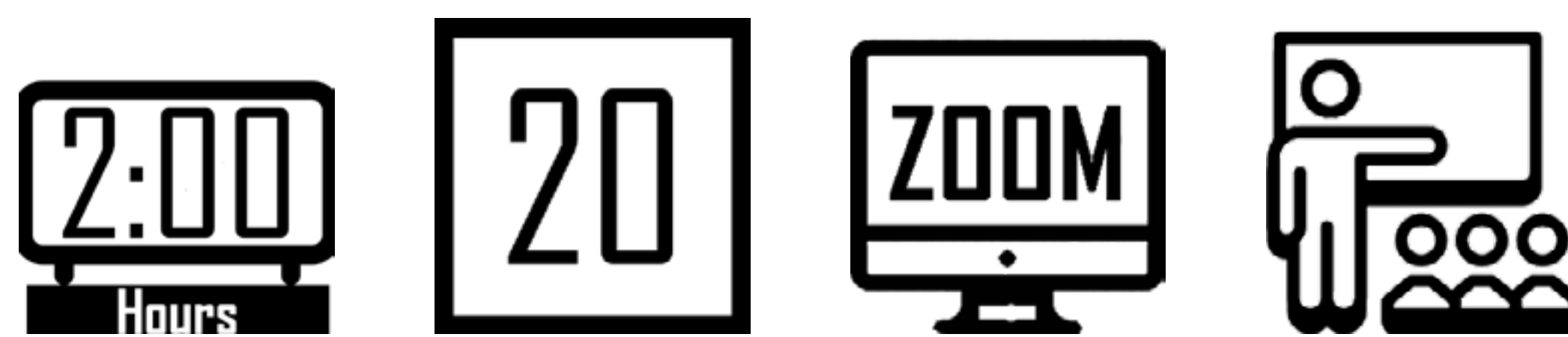


STRESS MANAGEMENT

There are excess amounts of stressors currently impacting the workplace. This course takes a unique approach to stress management. There are times when we experience positive, productive tension, however; when it crosses the line and makes us unproductive, that is the definition of stress, and there is nothing positive about stress. We will begin with introducing the behavioral styles, then dive deeper into what happens to each of these styles when they are under stress. In this course, we will discuss processes for reducing stress, relaxation techniques, and a strategy for improving unsatisfactory relationships, all to ensure employees can bring their best selves to work every day.

Objectives

- Identify points of tension and stress among your team
- Using tension as a positive motivator 360- Degree SOCIAL STYLE and Versatility Assessment
- Identify each SOCIAL STYLE under stress Learn a process to reduce defensive fight behavior
- Learn a process to reduce defensive flight behavior
- Apply strategies for improving less-than-satisfactory relationships
- Dynamic Developments Communication Process



TIME MANAGEMENT

Time management is self-management. Learn what you need to do to be more productive in less time and with less stress.

Objectives

- Plan and prioritize each day's activities in a more efficient, productive manner
- Use technology to be more efficient
- Overcome procrastination
- Organize your workspace and workflow
- Delegate more efficiently
- Eliminate time wasters
- Learn to say "no" diplomatically
- Minimize the impact of distractions
- Ensure meetings are efficient



TOP TEN TIPS TO MANAGE YOUR TIME

This one hour session will teach techniques that are a foundation of superior time management.

Objectives

- Prioritize tasks
- Overcome procrastination
- Decrease distractions and interruptions
- Say “no” diplomatically
- Make meeting more efficient and productive



TOP TEN WAYS TO IMPROVE YOUR CRITICAL THINKING SKILLS

This one-hour session will teach you what you need to focus on to increase your critical thinking.

Objectives

- Recognize the importance of being curious and asking great questions
- Adopt a creative, problem-solving approach
- Distinguish between facts and opinion
- Use experts
- Use logic and avoid “logical fallacies”
- Challenge your perceptions



WE DON'T HAVE ENOUGH TIME

One of the most consistent concerns expressed to us by professionals and teams around the world is this: We don't have enough time! The stress of having too much to do and not enough time to do it is overwhelming. In this interactive webinar, Andy Kaufman shares practical lessons to help you get a better handle on what it takes to more successfully manage your time and commitments. Topics include understanding the role of taking care of yourself (including getting more sleep and exercise), factors that drive procrastination (and strategies to overcome them that will help you manage your time and projects), ways to say No without saying "No", and strategies to manage interruptions.

Objectives

- Explain how sleep, exercise, and diet directly impact their ability to better manage their time and commitments
- Describe research-based strategies to battle procrastination
- Implement practical skills to stay focused on their top priorities
- Describe strategies to say “No” to commitments they should not be making, even when there’s social pressure to say “Yes”





YELLOW BELT

Yellow Belt certification with a master coach A Yellow Belt is an effective associate who brings problem-solving skills to any team. Work at all levels is challenged daily by problems that make it slow, inflexible, defective, hard to supervise. At the same time, associates at all levels want to and must do a good job. This course gives your associates the best concepts and tools to solve problems and sustain excellence every day. Our instructor-coaches have worked in Lean Six Sigma programs with IBM, Pepsico, Johnson & Johnson, Shell, and many medium-sized companies.

Overview

- Experience a one-of-a-kind learning method
- Case-based teaching brings the most realistic experience possible for the classroom
- Custom courses include on-site activities with participants' current challenges
- Participants MUST supply their own laptop PC with MS Excel 2010 or newer

Objectives

- The Yellow Belt body of knowledge in a form that is immediately useful at work
- How to spot and solve problems in teams and individually
- Daily meeting facilitation and presentation skills

Workshops

Understanding the Operation (Day 1)

- Basics of Lean
- Cost of Poor Quality
- Operational Problems
- Voice of the Customer
- Voice of the Process – data collection
- Quality Tools
- Understanding Data
- Basics of Six Sigma
- Understanding Variation

Stabilizing the Operation (Day 2)

- Learning from the Gemba
- Seeing the Waste in the Work
- 5S
- Poka-Yoke
- Visual Management
- Cellular Work
- Guided Innovation – SCAMPER, Kata
- Standard Operating Procedures
- Monitoring and Responding to Variation

LEAN SIX SIGMA SHORT CERTIFICATE COURSES

The new short certificate courses were created to reduce a significant commitment of time or money. Any of these courses and tracks will equip the participants with a new vision of their work, roadmap for improvement, and tools immediately useful in their workplaces. As an extra benefit, completing any of these tracks counts towards earning a Green Belt certification.

Getting Smart with Numbers

BEYOND ZERO DEFECTS

This half-day session focuses on the questions: Is there anything wrong with seeking to have zero defects? What is the impact of producing to meet specifications?

Objectives

- Define defect, defective, and the cost of being in-spec
- Target setting and variation reduction to reduce costs

MANAGING VARIATION

This full-day session focuses on the questions: What does it mean when a metric is higher or lower than last week? Can you tell whether a change is significant?

Objectives

- Differentiate between random variation and a signal to action
- Control charts 2

NUMBERS THAT MATTER

This full-day session focuses on the questions: How do you know what to measure? By what method? How frequently, precisely?

Objectives

- Identify KPIs
- Define data collection plans
- Learn to see the data and interpret the meaning of any changes

Managing Daily Work Easier

LETTING THE WORK FLOW

This full-day session focuses on the questions: What gets in the way of smooth, fast, defect-free work? How many of our efforts are wasteful?

Objectives

- Identify non-value-adding tasks
- Surface wasteful practices: the Hidden Factory or Hidden Office
- Challenge “the way it’s always been done”

PRODUCTIVE WORKSPACES

This full-day session focuses on the questions: Are you enabled or hampered by your workspace? Can you find what you need to work on? Quickly? How much walking is productive? Are any work areas less safe than they should be?

Objectives

- Conduct Gemba walks
- Chart motion with Spaghetti diagrams
- Analyze value-added, non-value-added work
- Redesign your workspace: 5S, cellular work

VISUAL WORKSPACES

This half-day session focuses on the questions: Can you immediately see and understand your operation? Are issues on the surface or buried deep down? How to accelerate feedback? Are you able to show desired behaviors and performance?

Objectives

- Display daily performance to support improvement
- Jidoka
- Feedback flows and action
- Reduce the number of meetings



Working as a Team

MAPPING WORK FLOW

This full-day session focuses on the questions: Do you know how the work is done? When is the last time you walked along with a document or part? Which procedures are cumbersome, frustrating?

Objectives

- Create a common picture of the work
- SIPOC
- Map processes and uncover challenges (bottlenecks, handoffs, delays)

OUR WORK END-TO-END

This full-day session focuses on the questions: Do you know how the work is done? When is the last time you walked along with a document or part? Which procedures are cumbersome, frustrating?

Objectives

- Calculate first-time productivity
- Learn the five hidden costs of poor quality
- Process efficiency

WINNING AS A TEAM

This half-day session focuses on the questions: What happens when we let bad products go by? May the customer suffer? May our teams suffer too?

Objectives

- The operation as an integrated system
- Define accountability in a systemic way
- Learn the “3 Nevers” of teambuilding and quality.
- RACI

Working Better and Faster

IMPROVING THE WORK EVERYDAY

This full-day session focuses on the questions: Where to start improving when everything seems urgent? How to improve operations and personnel performance? Will small changes make a difference?

Objectives

- Ask ‘why’ not ‘who’
- Ask ‘why’ 5 times
- Learn how to get started by making small changes: Kaizen, Kata
- Error prevention: Poka-yoke
- Standard work

MEASURING WORK RESULTS

This full-day session focuses on the questions: Who do we work for, and which results are important? What is the relationship between results, processes, and inputs?

Objectives

- Voice of the customer
- Key performance indicators
- Input, process, and output variables
- Data collection planning and execution
- Data visualization and Pareto charts
- Run charts and trends

SOLVING PROBLEMS IN OPERATIONS

This full-day session focuses on the questions: What should we do when we spot a problem? Escalate or take action? How do we learn more about our operations every day?

Objectives

- Managing feedback loops
- Match responsibility with the information
- Jidoka
- Win in small increments: PDSA

BRIDGING THE GENERATIONAL GAP: EFFECTIVE COMMUNICATION AND MANAGEMENT

In today's diverse workplace, effective communication and management across different generations are essential for fostering collaboration, boosting productivity, and creating a harmonious work environment. This dynamic and interactive workshop is designed to help your organization bridge generational gaps while incorporating the powerful insights of SOCIAL STYLES to enhance interpersonal interactions. By the end of this engaging workshop, participants will be equipped with the knowledge and skills needed to navigate generational differences with confidence, fostering a more harmonious and productive work environment.

Outline

1. Understanding Generational Differences:

- a. Explore the unique characteristics, values, and communication preferences of each generation, from Baby Boomers to Gen Z.
- b. Discover how generational differences can impact teamwork, leadership, and organizational culture.

2. SOCIAL STYLES Assessment:

- a. Participants will undergo the SOCIAL STYLES assessment to identify their communication and behavioral tendencies.
(short self-assessment)
- b. Gain insights into your own SOCIAL STYLE and how it influences your interactions with colleagues from different generations.

3. Effective Communication Strategies:

- a. Learn practical techniques to adapt your communication style to connect with individuals from various generations and SOCIAL STYLES.
- b. Develop active listening skills and empathy to build stronger relationships and resolve conflicts.

4. Multigenerational Leadership:

- a. Explore strategies for effective leadership that transcend generational boundaries.
- b. Foster an inclusive leadership approach that leverages the strengths of each generation and motivates team members.

Project Management

ESSENTIALS PROJECT MANAGEMENT

Delivering projects on time, on budget, with the desired scope is no small order. Today's business environment demands more to be done with less. The pressure to deliver without slipping schedules or over-spending continues to grow. This learning session provides participants the essentials they need to identify and practice standard project management skills and techniques. Based on the Project Management Institute's Project Management Body of Knowledge (PMBOK® Guide), this interactive session will use exercises and small group activities to ensure participants leave with a practical understanding of project management's essentials.

This workshop is designed for Project Managers & Leads, Business Analysts, Team Leaders, Project Team Members, and Stakeholders.

Objectives

- Identify key factors that lead to project success (and failure)
- Describe the Project Management Institute's 5 Project Management Processes and the type of activities that occur within them
- Facilitate a work breakdown structure exercise on a real-world project
- Describe techniques to influence project stakeholders, even when they don't have authority over them
- Identify techniques to provide better estimates for projects
- Describe strategies for managing changes that inevitably occur with projects
- Describe the critical path and how to use it to manage a project successfully
- Apply the following structured approach for managing risks: risk identification, qualitative risk analysis, risk response planning
- Describe how to draw out lessons learned at the end of a project

Outline

Key Project Management Concepts

- What is a project?
- Why do projects fail?
- Rolling wave planning
- The triple constraint

People and Projects

- Key insights into leading teams and managing stakeholder relationships.

Initiating a Project

- Aligning projects to business needs
- Developing a project charter
- Understanding project stakeholders

Planning a Project

- The payback of planning (without going into analysis-paralysis)
- Developing a scope statement
- Defining success criteria

Work Breakdown Structure

- Why develop a WBS?
- Practical techniques for facilitating WBS sessions

Estimation Techniques

- Concepts to improve estimating
- Overview of estimation techniques

Critical Path

- What it is and why it matters
- Practical examples of how to use critical path to deliver

Risk Management

- Risks and projects
- Practical techniques to identify and plan for risks

Closing

- Practical tips for closing a project and drawing out lessons learned



ADVANCED PROJECT MANAGEMENT

Delivering projects on time, on budget, with the desired scope is no small order. Statistically speaking, the odds are not in our favor. Yet, the margin for error has all but disappeared in most organizations. We have to deliver.

The Institute's Advanced Project Management Workshop is a combination of nuts-and-bolts theory and practical lessons learned, all packaged in a fast-paced, highly interactive session to get your organization on track to deliver successful projects consistently.

This workshop was designed for project managers & leads, Business Analysts, Team Leaders & Members, Stakeholders, and those aspiring to get their PMP Certification.

Objectives

- Analyze which projects should be selected over others, helping to ensure the right projects are worked on
- Describe the importance of identifying & analyzing stakeholders to manage expectations
- Identify the standard practices for project cost management, including earned value analysis
- Describe the practices to build quality management into projects
- Identify the key practices involved in project procurement management
- Identify the appropriate conflict-handling style for the situation to manage project conflict better
- Describe methods to improve accountability and influence skills among project team members
- Apply negotiating skills to typical project situations

Outline

Project Selection Methods

- Project lifecycle vs. Product lifecycle
- Benefit measurements methods, such as Weighted Scoring Model, Benefit-Cost Ratio (BCR), and Cash Flow Analysis Techniques

Stakeholder Analysis

- The importance of thoroughly identifying stakeholders
- Approaches to analyzing stakeholders to manage their expectations better.
- Dealing with stakeholders who are obstacles

Cost Management

- Techniques to estimate project costs.
- Best practices for project cost budgeting
- Earned value management principles and formulas
- Hands-on exercises to develop skills with earned value principles

Quality Management

- The importance of prevention over the inspection and other key quality lessons
- Influential voices in quality management
- How to plan quality into projects
- Quality assurance and quality control

Procurement Management

- Best practices for project procurement management
- Applying those practices in your organization
- Contract types and concepts

Managing Conflict

- Sources of conflict on projects
- Conflict handling modes & techniques
Accountability & Influence
- Techniques to improve accountability and influence on teams

Negotiating Skills

- Stages of negotiating
- Hands-on negotiating exercise



FOUNDATIONS OF AGILE PROJECT MANAGEMENT

Agile has quickly become the go-to project management approach for a wide range of industries. In this course, you will be introduced to agile project management, including the core values and principles outlined by the Agile Manifesto. This fast-paced, highly interactive course discusses common myths and misconceptions about agile approaches. It identifies factors to consider when deciding whether to adopt agile practices and explains the general agile practices that a company may want to adopt.

This workshop is designed for anyone who wants to efficiently lead or participate in projects that experience frequent project requirements changes.

Objectives

- Identify the key factors helping and hindering your organization from more reliable project delivery
- Describe the values of the Agile Manifesto and why they are important to project success
- Describe the difference between “being agile” and “doing agile”, and why the distinction is critical
- Identify which projects are better suited for agile approaches
- Describe how servant leadership and self-organizing teams work on agile teams
- Identify the common practices that span the different agile approaches
- Identify the roles, events, and artifacts of Scrum
- Describe why transparency, inspection, and adaptation are critical pillars of Scrum
- Apply the learning to identify opportunities to start your transformation to agile practices

Outline

Your Current Project Culture

- What’s helping you deliver today?
- What’s hindering your projects?
- How agile can help you transform your project culture

Agile Manifesto and Principles

- What is the manifesto, and why are the values so important?
- How are you already following some of the principles, and which ones need more focus?

Creating an Agile Environment

- What is an agile mindset?
- How servant leadership helps agile teams succeed
- Roles in agile teams
- The difference between specialists and generalizing specialists
- Overcoming organizational silos

Delivering in an Agile Environment

- How to charter an agile project and team
- Agile practices that are common across most agile approaches
- Troubleshooting agile project challenges
- Measurements in agile projects

Scrum

- Introduction to Scrum
- Scrum theory and values
- How Scrum teams work, including the roles of Scrum teams
- Scrum events and artifacts

Simulation

- Learning Scrum using a LEGO based simulation

Next Steps

- Brainstorming on the next steps to implement the learning



MAKE BETTER DECISIONS FOR YOU, YOUR TEAM AND YOUR PROJECTS

As leaders of teams and projects, we regularly face choices and decisions that have downstream consequences. Do you want to be able to make better decisions in your personal or professional life? Do you want to help your team members make better choices when it comes to decisions on their projects? Or are you merely curious about how and why people make certain choices?

In this highly interactive webinar, Andy Kaufman, PMP shares why the familiar pros-and-cons approach seems to make sense—but is profoundly flawed. He discusses how our biases influence the options we consider and the choices we make, and how we can fight those biases. Andy shares examples of how team leaders can influence team decisions in positive and negative ways. Is our problem with decisions that we are overconfident? Maybe— and maybe not! Andy will show how overconfidence is overrated as an explanation for poor decisions.

Objectives

- Describe a phrase that helps identify when they are not evaluating enough options for their decisions
- Summarize how biases impact decisions we make
- Implement a 4-step process to help them make better decisions
- Describe strategies to help validate assumptions before making decisions
- Identify approaches to cut their losses on bad decisions



Project Management

PMI® PMP® PROFESSIONAL EXAM PREP

This learning session provides participants with the critical direction they need to take the Project Management Institute's Project Management Professional (PMP®) certification examination. This intensive, one-day session is designed to get participants on the path to achieving their goal of becoming PMP certified. The session helps participants understand what they need to focus on in their preparation. Tips are provided to help them answer challenging questions, along with a top rated exam preparation book, Project Management Body of Knowledge (PMBOK), and a CD that provides a simulated exam testing experience. (3 books total)

Outline

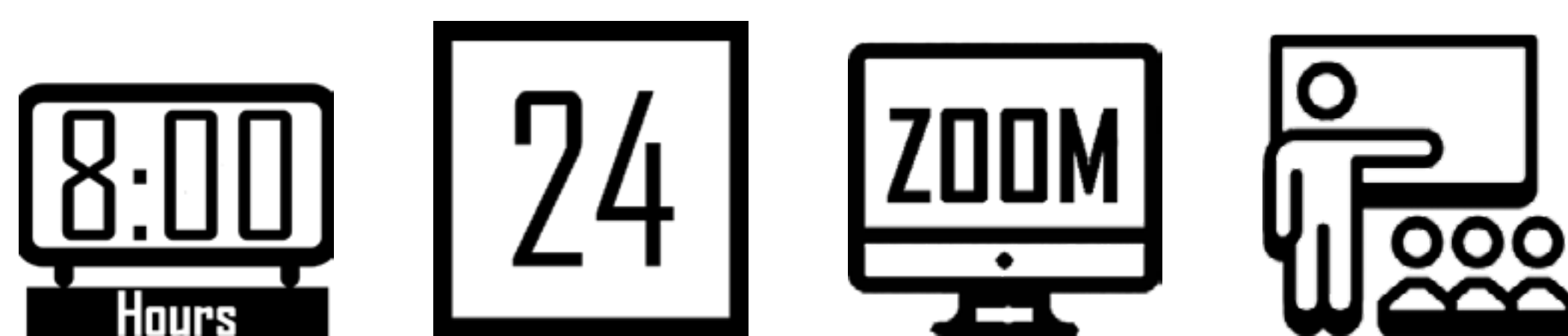
Topics

Module 1: Introduction: This module introduces the participants to the workshop and each other. Topics include objectives, how to get the most out of the workshop, and participant introductions. Length: 30 minutes

Module 2: PMP Certification: This section provides a detailed overview of the certification process. Topics include the application process, where to take the exam, information about the exam, and how to pass the exam. Length: 1 hour

Module 3: What You Need to Know: This section steps through important topics that must be understood in order to pass the certification examination. Topics include detailed review of difficult and critical PMBOK concepts, tools, and techniques. Each of the 9 Knowledge Areas, plus Professional Responsibility, is covered. This module includes multiple passes at sample examination questions and reviews of answers. Length: 7 hours, including lunch and breaks.

Module 4: Wrap-Up: Participants summarize key lessons learned and plan actions they will take as a result of the course. Length: 30 minutes



PROJECT MANAGEMENT SIMULATION

This one-day simulation provides a bridge from the typical classroom teaching to the application of the learning. This learning event is a great follow-up to our project management series of classes. Whether you are preparing for certification, looking to earn continuing education credits after certification, or want to tune-up your project management skills, this simulation is an engaging and informative way to further develop your ability to confidently lead and deliver.

Who Should Attend

Project managers preparing for certification. Certified project managers seeking continuing education credits (PDUs) Professionals responsible for managing projects who want to refresh their skills.



YOU ARE A PROJECT MANAGER: LESSONS TO HELP YOU DELIVER

The business has communicated its needs. You're excited to leap into the challenge of delivering the highest value possible and exceeding expectations. What's next? You have to deliver!

Regardless of the title, we are all project leaders. You've learned the ropes when it comes to leveraging technology to deliver value. But how do you juggle all the risks and competing demands to deliver successfully?

Objectives

- Describe what project management is and how it relates to your role
- Identify key factors that cause projects to fail (and succeed)
- Summarize an easy-to-remember model to guide the next steps when changes occur
- Apply a 3-step process for managing risks (so they don't become issues)



SAFETY TRAINING

Hazard recognition emphasizes the importance of knowing your workplace equipment and machinery to avoid any accidents from occurring. It is the best way to prevent accidents.

Objectives

- Bi-Lingual Training Offered
- Classroom or Virtual program
- Customize scheduling to fit your needs
- Can be delivered on-site at your facility



Outline

Safety Trainings can be customized to include some or all of the below.

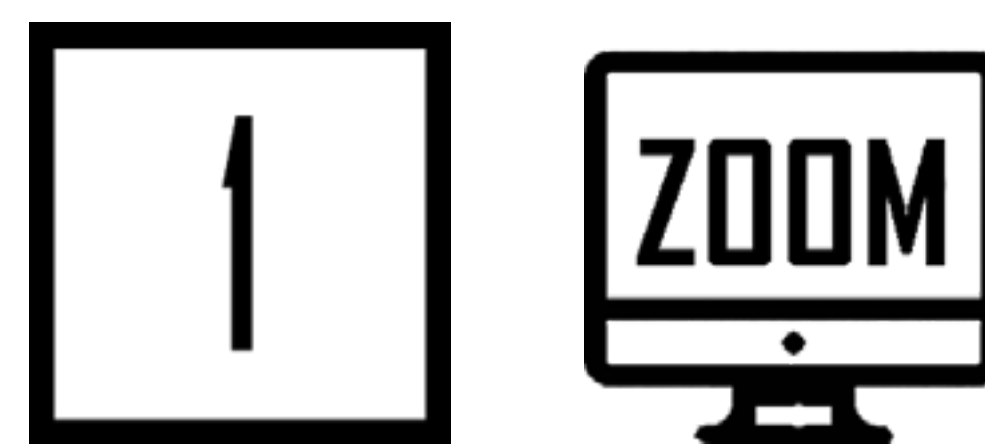
- 10 & 30 Hour General Industry
- 10 & 30 Hour OSHA Construction
- 40-Hour Hazwoper Training
- 8-Hour Refresher Training
- Aerial Lifts
- Bilingual Safety Training
- Bloodborne Pathogens Training
- Develop Safety Policies and Programs
- Electrical Safety/NFPA 70E/Arc Flash
- Excavation & Trenching Safety
- Fall Protection Training
- Fire Protection, EAP's & FPP's
- First-Aid/CPR/AED
- Flagger Training
- Forklift Safety Training Programs
- Hazard Communications/GHS
- Jobsite Safety Audits
- Lead Awareness Training
- Lockout/Tagout Training
- Permit Required Confined Space
- Personal Protective Equipment
- Recordkeeping
- Respiratory Protection
- Safety Consultations
- Scaffolding Safety
- Silica Awareness Training
- Work-zone Safety
- Written Health & Safety Programs

HOGAN INDEX

Currently, one of the most popular assessments on the market due to its research-based validity and unique measuring of career risk factors. The Hogan Assessment is used in development planning for identifying one's strengths and development needs at a point in time.

Objectives

- Motives, Values & Preferences Inventory - internal Personality factors that describe core goals, drivers, and interests determine what we desire and strive to attain
- Hogan Personality Inventory - the "Light Side" of Personality; shows personality factors that we use every day in our normal state of being
- Hogan Development Survey - the "Dark Side" of Personality; shows interpersonal behaviors that emerge as career risk factors when a person is under stress or is not actively managing how he/she comes across

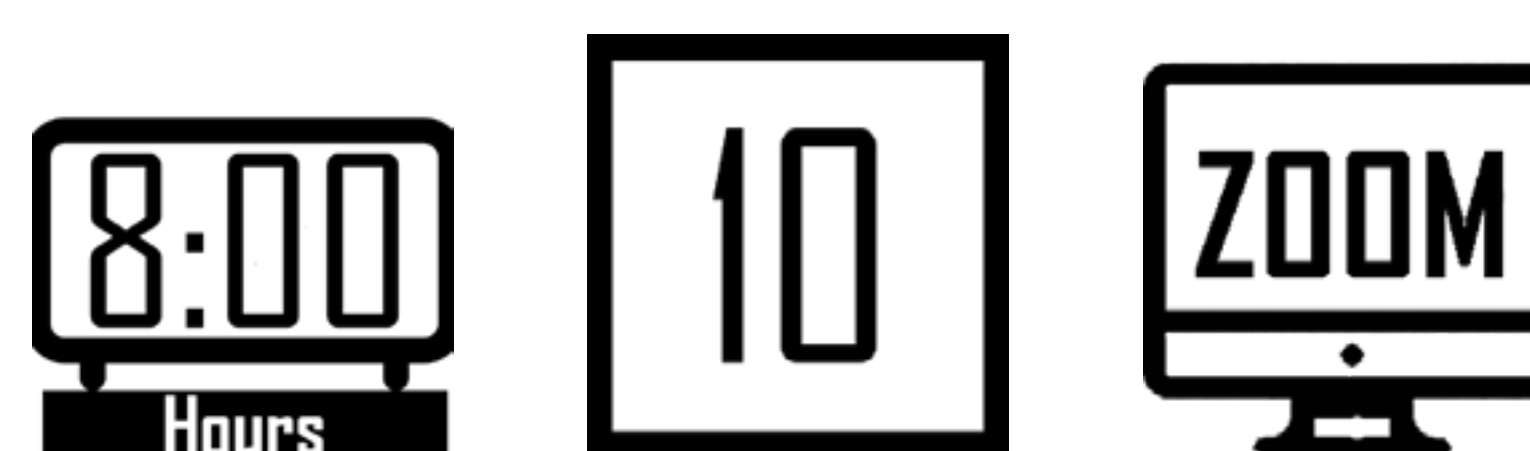


KOLBE INDEX

Measures subconscious action instinct, called Conation, which predicts how you will take action on things that matter to you. Because it's very predictive of action, and very reliable over time (your profile does not change over the years) it is a good tool for use in hiring and staffing, along with identifying good-fit career roles.

Objectives

- Comparing one's own action instincts to one's own job and to a supervisor's view of one's own job, for job-fit and coaching purposes
- Profiling the range of instincts on a team (Kolbe Team Synergy Report) in order to identify success strategies for working across differences
- Identifying future career implications of one's action instincts
- Assessing the action instincts fit for candidates in hiring situations



MYERS-BRIGGS TYPE INDICATOR

The latest version of the classic MBTI was developed and released in 2001 (the original dates to the 1940s). The MBTI is frequently used for self-validation, career planning, and team development (relating to others with differences from our preferences)

Objectives

- In addition to the four basic scales measuring Personality Preferences (personality types), the MBTI includes a Step II personality inventory. The Step II report breaks down each preference into facets, which allows for more indepth analysis showing the diversity of behavior
- The Team Report profiles the team's collection of personalities and then identifies strengths and blind spots



DISC

Your individual personality affects every aspect of your life. That's why one of the best thing you do to grow yourself and others is to understand your personality and what naturally drives you. When recognize your stregths and weaknesses, you are able to give your best as you work with people around you.

Everyone you encounter is motivated differently, communicates differently, and views tasks and relationships differently. This workshop will help you achieve greater success when you learn to value your strengths as well as those of others.

Objectives

- Apply the Law of Awareness to recognize your strengths and limitations.
- Overcome your shortcomings and clear the path for personal and professional growth.
- Understand how others are different and how to work with each personality.
- Build a stronger team that communicates, appreciates the style of others and works well together.
- Learn effective strategies for handling conflict and personality clashes.
- Develop yourself and others to be their best.

BLUEPRINT READING TRAINING

Outline

Day 1:

- Title Blocks
- Alphabet of Lines and symbols
- Orthographic projection
- Auxiliary views
- Sections Views
- Assembly Drawings

Day 2:

- Methods of Dimensioning and tolerances
- Decimal dimensions and Tolerances
- Angular Dimensions and Tolerances
- Dimensioning Holes
- Dimensioning Arcs and Radii
- Dimensioning Circular Hole Patterns

Day 3:

- Geometric Tolerances and Symbol
- Machining Symbols
- Machining Process
- Screw Threads

INT 110 - PREVENTATIVE AND PERIODIC MAINTENANCE

Are you working in the maintenance or facilities field? Do you need to learn how to do preventive maintenance? This could be the course for you. This course covers preventive and periodic maintenance in the industrial mechatronics environment. You will learn to write work orders that will help control maintenance decisions and aid in evaluating the need for preventive maintenance.

INT 114 - MEASUREMENT & QUANTITATIVE SKILLS FOR INDUSTRY

Need to learn precision measurement skills using gauges, micrometers, dial calipers and more? Do you know how to use your tape measure, dial caliper, and micrometer? This course is designed to help you learn or brush up on measuring skills and review the math skills used in the trades. This is the perfect course for beginners.

INT 119 - PRINT READING

Ever wondered how one understands maintenance and repair documents for various types of machinery or trades? This course will teach you how to read maintenance requests and be able to identify issues that need repair. You will also learn how you would write your own maintenance requests and repair documents.

INT 120 - BASIC PNEUMATICS - SACAC-209

Have you ever wondered what you can do with air? Need to learn basic training in pneumatics? This course explores the component construction and operation for beginners. You will be taught pneumatic theory and shown how to assemble and disassemble industrial components that are used within the field.

INT 121 - INTERMEDIATE PNEUMATICS - SACAC-304

If you already have some knowledge of pneumatics, this course might fit you. In this class, you will learn the process of installation, maintenance, and troubleshooting industrial pneumatic systems. You will learn how to do all of this by learning and working with pneumatic valves, vacuum systems, and air compressors. All of which are machines used in the pneumatics field.

INT 122 - BASIC HYDRAULICS - SACAC-255

Did you know that there are machines powered by fluid? Have any interest in wanting to learn more about them? These are called hydraulics, and, in this course, you will learn the theory function and the assembly and disassembly process of these machines. A great course for beginners in hydraulics.

INT 123 - INTERMEDIATE HYDRAULICS - SACAC-256

Want more than a basic knowledge of hydraulic systems? This course will give basic training in hydraulic systems and components. You will learn how both interact with one another through industrial hydraulic circuits.

INT 124 - PUMP SYSTEMS

Whether you are working with water slides or ejector pumps, this course teaches you everything you need to know about industrial pumps and drive mechanisms. You will learn basic knowledge of centrifugal, diaphragm, and piston pumps. You will have hands on experience with installation, maintenance, and troubleshooting.

INT 150 – MECHANICAL DRIVES AND MOTORS - SACAC-210

Do you know what moves the world? Motors. This course is all about all the different components behind mechanical drives and motors. The course will test you on demonstrating installation, alignment, and troubleshooting with mechanical drives. It will also teach the safety and cleaning protocols of the machines.

INT 154 – MECHANICAL ALIGNMENT AND BEARINGS - SACAC-301

If you already have knowledge on motors and installation, this class will take you even further. This course covers mechanical alignment and bearings. You will learn about lubricants, gaskets, seals, shaft alignment and correct selection.

INT 159 – ELECTRICAL SYSTEMS, WIRING, & TROUBLESHOOTING - SACAC-201/202

Do you know how many people it takes to change a light bulb? Just you after this course. This course will teach you the required knowledge needed in AC/DC theory, electrical wiring, and you will move on to motor control circuits. You will develop a practical understanding of electrical components, control, and operation.

INT 240 - BUILDING AUTOMATION 1 - SACAC-207

Looking into building maintenance for a career? This class centers on learning Allen Bradley Programmable Logic Controllers (PLC). These PLCs are the heart of building automation. This class will cover how these work and how to program PLCs.

INT 241 – BUILDING AUTOMATION 2 - SACAC-208

If you have taken the first class on Building Automation, this course is an extension of the Allen Bradley PLC course. You will go deeper into learning about the A/B PLC and will cover troubleshooting.

INT 287 – PROCESS CONTROL TECHNOLOGY

If you have an interest in how major companies create a “recipe” this class might be of interest to you. Whether it is pharmaceuticals, chemicals, drinks, or food, Process Control is what helps the “recipe” take shape. You can learn how to use automation systems to dial in all PH levels, temperatures, pressures, and liquid levels while conducting a process. This course is advanced and for those who already work in the industry.

ARM 280 – ADVANCED MOTOR CONTROL - SACAC-203/204

Building automation is a complicated process that comes in many forms. This course is the next step from basic electrical work to getting to building automation. This is a course in advanced motor control that will teach you how to make all processes, safety circuits, and reversing motors easy. This is all the knowledge you need to move on to Programmable Logic Controllers (PLC) controls.

ARM 281 – INTRO TO PLCS

This is a course in basic Programmable Logic Controllers (PLC) logic. You will start with the basics and move on to building circuits, programming the PLCs, and troubleshooting the system.

BECOMING DECISION-DRIVEN

It's important to be data-driven. It's even more important to act based on that data. That's where many organizations fall short.

Data-driven organizations start with the data. They collect and analyze what they can. Then they try to figure out what to do with it. This results in complicated, drawn-out presentations and discussions. It also slows down and hurts decision-making. Decision-driven organizations start with the decision. The decision drives that data that is collected. The decision drives the analysis. The decision drives how the story is put together. This results in simple, clear stories and recommendations. It enables better and faster decision-making. In a decision-driven organization the decisions are front and center. The data are in the background for support.



MANAGING YOUR KEYNOTE

Leaders manage stories. They manage the story of their products, customers, people, and operations. Too often, however, leaders lose sight of that. They lose the story. Instead, they get sucked into the data. It doesn't matter how good your data are if they are focused on the wrong story. Are you spending more time talking about data than the decisions and actions associated with that data? If so, you're focused in the wrong place. Join us as we help you recapture your story.

What You'll Learn

- Define your story
- Understand your story
- Stay focused on the story

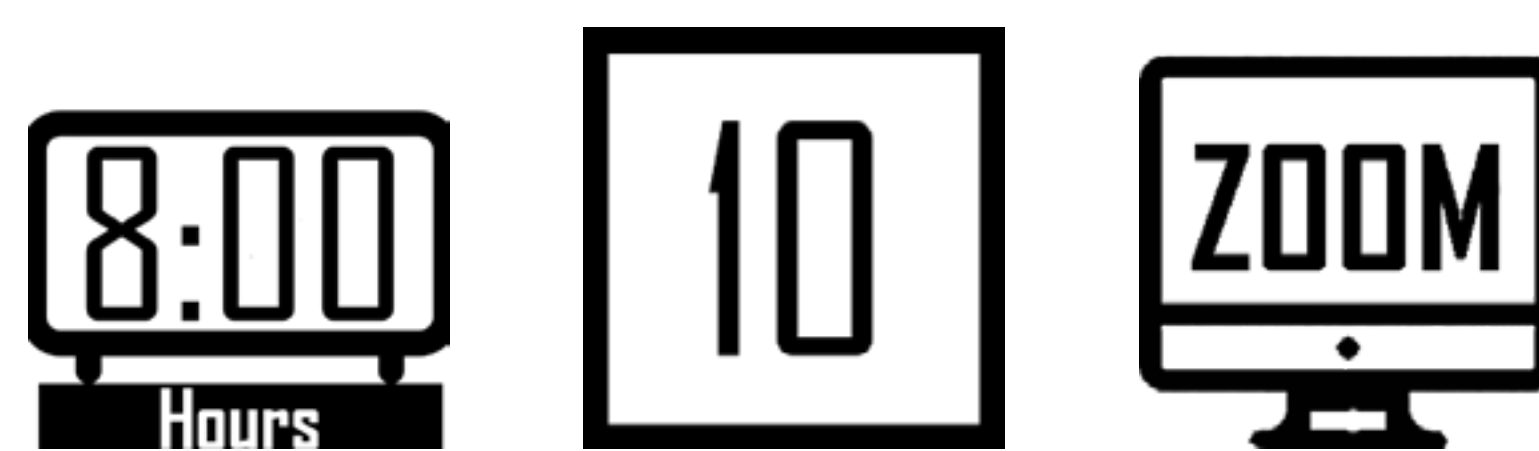


FINDING YOUR STORY

Finding the Story covers the first three modules of Rethinking Data. It provides tools and techniques to simplify your data collection, analysis and decision making. The workshop is focused on reducing excess and nonrelevant data to speed up and improve decision-making. The workshop will help your team close the gap between their analysis and the decisions and actions driven by them.

What You'll Learn

- Managing biases that inhibit data-driven decision making
- Quickly defining the data needed to make a decision
- Turning data onto actions that drive decision making
- Creating reports that provide answers rather than numbers



SHARPENING YOUR POINT

Sharpening your point covers the last two modules of Rethinking Data. It provides tools and techniques to simplify your communication. The workshop is based on our “Five-Second Rule”. If a person can’t get your point within five seconds or less, it’s likely to be lost. The workshop will help your team communicate simply, clearly, and directly. Our techniques can be applied across all forms of communication (spoken, written, presented).

What You'll Learn

Sharpening your point helps individuals create simple, clear, and direct communication by:

- Breaking information into understandable and maneable pieces
- Simplifying ideas and messages
- Separating key points and supporting evidence
- Creating simple, easy-to-follow stories and arguments.





RETHINKING DATA

Closing the gap between analysis and action! Organizations are facing a big problem when it comes to Data. It used to be that we didn't have enough. Now, it's the opposite; we have more than we need. As a result, too many organizations are focusing on the wrong place. Rethinking Data is an eight-hour workshop that improves leaders' efficiency and effectiveness at making data-driven decisions. This workshop is not a number-crunching course. Rethinking Data takes the next step, addressing the common pitfalls that prevent leaders from using data to drive decisions. The workshop is based upon Avail Advisors' Eight Rules for Rethinking Data and is facilitated by the founder, Brad Kolar for Business Professionals in any industry or at any level.

Objectives

- Four techniques to drive simple, clear, and actionable decisions:
 1. Decision breakdown tree – quickly identifies the exact data needed to drive a decision.
 2. What, why, but, and – Report status in under 3 minutes
 3. Six-slide recommendation – Deliver a full recommendation in under ten minutes using just six slides (or paragraphs)
 4. Decision-based reporting – Organize reports around answers rather than numbers.
- Understanding and managing the three key biases that inhibit data-driven decision making
- Quickly defining the data needed to make a decision so that you spend more time thinking about what the Data is telling you and less time searching for it
- Turning data into actions that drive decision making
- Creating reports that provide answers rather than numbers and significantly decrease decision making time
- Creating simple, logical, fact-driven recommendations and presentations that speed up and drive audience decision-making

Why Rethinking Data is Crucial

Presentations are littered with tables, charts, graphs, and visualizations. That is not where the value lies. The value in Data is not the numbers – its action. The more time you spend looking at numbers, the less time you have to act upon them. The problem is that people don't know what to include and what to exclude when making and communicating data-driven decisions:

- They gather more data than they need or the wrong Data
- They build recommendations using incorrect or faulty logic
- They confuse “simple“ with “superficial.”
- They leave out critical context while driving into needless detail
- They focus on numbers rather than decisions and actions

Components

Rethinking how we think – Provides an overview of how our brains process data and information.

Introduces common thinking and decision making errors/biases and shows how traditional reviewing and presenting data contribute to those errors.

Aligning data and decisions – Focuses on honing in on the data relevant to making a decision. Improves leader efficiency by providing a structured approach to exploring data.

Turning information into action – Introduces the “Value through Information“ model, which moves leaders from simply summarizing facts and figures to telling a comprehensive data-driven story. Focuses on building an evidence-based argument that drive decisions and actions.

Telling a data-driven story – Provides a simple template for creating a data-driven, logical, and concise recommendation or story.

Rethinking reporting – Introduces Avail Advisor's “decision-based” reporting approach. Decision-based reporting organizes information around answers and decisions rather than merely providing a data dump.

RETHINKING DATA^(CONTINUED)

Client Success Stories

Problem: Every six months, the marketing team needed to develop its plan. They'd receive over a hundred ideas for marketing initiatives. Meetings were long, cumbersome, and often didn't result in a unified list. As a result, they would have to meet several more times until they culled their list.

Solution: The team used our Decision Breakdown technique to clarify, document, and agree upon the criteria that would be used to prioritize and select marketing initiatives. The tree ensured that every initiative was being presented and assessed using the same criteria.

Results: The meeting prep time was reduced, the meeting itself took half the time. Going forward, Decisions and consensus typically were reached during the first meeting and the decision making process was much quicker.

Problem: The client was considering whether to move a currently out-sourced process back into the organization. The process involved about \$20 million in resources. She was asked to make a recommendation to the company's COO and two Senior Vice Presidents. She was given 30 minutes.

Solution: The manager used the business-driven story template to develop and structure her presentation. The presentation itself took five minutes (with less than ten slides). There was a five-minute Q&A, and the leaders made their decision.

Results: Executives made a \$20 million decision in under 15 minutes (total, from the start of the presentation). The client said she never had an executive team make a decision so quickly. One of the Senior Vice Presidents commented that it was the best presentation he had seen in years. In particular, he noted that "She provided more clarity and insight in five minutes than we normally get in 45 minutes to an hour."



"Brad's ability to cut through the noise and deliver a compelling data-driven story (without information overload) is outstanding. His 'Rethinking Data' course is a refreshing take on how we present data and highly engaging. This course has equipped me with several practical techniques to help me really focus on the 'action and decisions' component of data analysis. Brad has delivered one of the best training sessions I've had. His enthusiasm for telling a great story with tangible insights from the data is inspiring."

— National Account Manager, Fortune 100 Consumer Packaged Goods Company



RETHINKING DATA – ADVANCED DECISION BREAKDOWN

Teaches participants how to plan and structure their data analysis to improve their speed, quality, efficiency and effectiveness in making data-driven decisions. The course focuses on approaching data in a focused, deliberate manner in order to ensure that the proper data is collected and analyzed. Participants use their own the decision as the basis for building the decision breakdown tree.

RETHINKING DATA – ADVANCED COMMUNICATION & STORY TELLING

Provides case study exercises to give participants the opportunity to practice synthesizing, structuring, and communicating data. Participants are encouraged to bring their own analyses and recommendations to turn into a simple, concise, and structured, presentation.

RETHINKING DATA – ADVANCED DECISION-BASED REPORTING

Provides a deep dive into decision-based reports and how to create them. The workshop discusses design considerations for decision-based reports. Participants are encouraged to bring their own report to convert to a decision-based report.

ENGLISH AS A SECOND LANGUAGE (ESL)

Based on recent studies, 90% of organizations face communication problems due to language barriers. Language barriers can hinder productivity, collaboration, customer retention, market expansion, and even pose safety issues. Increase your organization's confidence and ability to communicate with English as a Second Language (ESL) courses. Our professional, industry-leading trainers are experienced in working with adult learners in the area of language development.

Overview

- Participant assessments determine the required level of instruction
- Instructors utilize the best and latest ESL and foreign language training materials combined with your company's documents to create a customized curriculum for your workers' needs
- Instructors perform a thorough needs analysis and round table discussion with your company's managers and supervisors prior to launching any language program. All potential students' skills will need to be evaluated before recommendations can be given
- Can be scheduled Virtually or On-Site in a Classroom setting depending on your schedule
- Five Instruction Levels ranging from pre-literate up to advanced focusing on workplace and daily life topics and grammatical structure
- Customized Advanced ESL programs for verbal communication, pronunciation, business writing, presentation, and cross-cultural skills for non-native business professionals
- Basic Skills classes including mathematics, literacy, basic computer skills, GED, test-taking, etc.
- Command Spanish, designed for those who supervise Spanish-speakers in the workplace
- Foreign Language courses in any language with emphasis on workforce and business travel applications (Japanese, Italian, German, French, Chinese, etc.)