

## Microsoft Excel for Office 365 (Desktop or Online) - Part 2 1 day

This course builds upon the foundational knowledge presented in the Microsoft® Excel® for Office 365™ (Desktop or Online): Part 1 course and will help start you down the road to creating advanced workbooks and worksheets that can help deepen your understanding of organizational intelligence. The ability to analyze massive amounts of data, extract actionable information from it, and present that information to decision makers is at the foundation of a successful organization that is able to compete at a high level.

This course covers Microsoft Office Specialist Program exam objectives to help you prepare for the Excel Associate (Office 365 and Office 2019): Exam MO-200 and Excel Expert (Office 365 and Office 2019): Exam MO-201 certifications.

Upon successful completion of this course, you will be able to leverage the power of data analysis and presentation in order to make informed, intelligent organizational decisions.

- You will:
- Work with functions.
- Work with lists.
- Analyze data.
- Visualize data with charts.
- Use PivotTables and Pivot Charts.

## COURSE OUTLINE

### 1 - WORKING WITH FUNCTIONS

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- Topic A: Work with Ranges
- Topic B: Use Specialized Functions
- Topic C: Work with Logical Functions
- Topic D: Work with Date and Time Functions
- Topic E: Work with Text Functions

## **2 - WORKING WITH LISTS**

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- Topic A: Sort Data
- Topic B: Filter Data
- Topic C: Query Data with Database Functions
- Topic D: Outline and Subtotal Data

## **3 - ANALYZING DATA**

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- Topic A: Create and Modify Tables
- Topic B: Apply Intermediate Conditional Formatting
- Topic C: Apply Advanced Conditional Formatting

## **4 - VISUALIZING DATA WITH CHARTS**

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- Topic A: Create Charts
- Topic B: Modify and Format Charts
- Topic C: Use Advanced Chart Features

## **5 - USING PIVOTTABLES AND PIVOTCHARTS**

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- Topic A: Create a PivotTable
- Topic B: Analyze PivotTable Data
- Topic C: Present Data with Pivot Charts
- Topic D: Filter Data by Using Timelines and Slicers

## Microsoft Excel for Office 365 (Desktop or Online) - Part 3 1 day

In this course, you will build upon the foundational and intermediate knowledge presented in the Microsoft® Excel® for Office 365™ (Desktop or Online): Part 1 and Microsoft® Excel® for Office 365™ (Desktop or Online): Part 2 courses to help you get the most of your Excel experience. The ability to collaborate with colleagues, automate complex or repetitive tasks, and use conditional logic to construct and apply elaborate formulas and functions will put the full power of Excel right at your fingertips. The more you learn about how to get Excel to do the hard work for you, the more you'll be able to focus on getting the answers you need from the vast amounts of data your organization generates.

### *Learning Objectives*

Upon successful completion of this course, you will be able to perform advanced data analysis, collaborate on workbooks with other users, and automate workbook functionality.

- You will:
- Work with multiple worksheets and workbooks.
- Share and protect workbooks.
- Automate workbook functionality.
- Use Lookup functions and formula auditing.
- Forecast data.
- Create sparklines and map data.

## COURSE OUTLINE

### **1 - WORKING WITH MULTIPLE WORKSHEETS AND WORKBOOKS**

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- Topic A: Use Links and External References
- Topic B: Use 3-D References
- Topic C: Consolidate Data

### **2 - SHARING AND PROTECTING WORKBOOKS**

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- Topic A: Collaborate on a Workbook
- Topic B: Protect Worksheets and Workbooks

### **3 - AUTOMATING WORKBOOK FUNCTIONALITY**

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- Topic A: Apply Data Validation
- Topic B: Search for Invalid Data and Formulas with Errors

## **4 - USING LOOKUP FUNCTIONS AND FORMULA AUDITING**

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- Topic A: Use Lookup Functions
- Topic B: Trace Cells
- Topic C: Watch and Evaluate Formulas

## **5 - FORECASTING DATA**

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- Topic A: Determine Potential Outcomes Using Data Tables
- Topic B: Determine Potential Outcomes Using Scenarios
- Topic C: Use the Goal Seek Feature
- Topic D: Forecast Data Trends

## **6 - CREATING SPARKLINES AND MAPPING DATA**

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- Topic A: Create Sparklines
- Topic B: Map Data

## **Excel for Office 365 - Data Analysis with Pivot Tables .5 day**

Advances in technology have made it possible to store ever-increasing amounts of data. Along with this, the need to analyze data and gain actionable insight is greater than ever. You already have experience working with Microsoft® Excel® and creating basic PivotTables to summarize data. But Excel is capable of doing much more. Being able to harness the power of advanced PivotTable features and create PivotCharts will help you to gain a competitive edge. You will not only be able to summarize data for you to analyze, but also organize the data in a way that can be meaningfully presented to others. This leads to data-driven business decisions that have a better chance for success for everyone involved. This course presents information and skills that are appropriate for users of either the Office 2021 or Office 365 applications. However, the instructional environment for the delivery of this course utilizes Office 365.

### **Learning Objectives**

In this course, you will use the advanced PivotTable functionality in Excel to analyze your raw data.

- You will:
- Prepare data for PivotTable reporting and create PivotTables from various data sources.
- Analyze data by using PivotTables.
- Work with Pivot Charts.

### **COURSE OUTLINE**

#### **1 - PREPARING DATA AND CREATING PIVOTTABLES**

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- Topic A: Prepare Data
- Topic B: Create a PivotTable from a Local Data Source
- Topic C: Create a PivotTable from Multiple Local Data Sources
- Topic D: Create a PivotTable from an External Data Source

#### **2 - ANALYZING DATA BY USING PIVOTTABLES**

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- Topic A: Summarize PivotTable Data
- Topic B: Organize PivotTable Data
- Topic C: Filter PivotTable Data
- Topic D: Format a PivotTable
- Topic E: Refresh and Change PivotTable Data

## 3 - WORKING WITH PIVOTCHARTS

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- Topic A: Create a PivotChart
- Topic B: Manipulate PivotChart Data
- Topic C: Format a PivotChart

## Strategic Negotiation Skills 2 day

Students will learn the essential strategies and techniques needed to guide negotiations from opening discussions through to a positive result. Students will leave with practical solutions to negotiating effectively.

### *Learning Objectives*

After completing this course, students will be able to:

- Develop the necessary skills to negotiate like a pro
- Prepare for a negotiation applying best practices
- Utilize industry standard tools and techniques
- Create your Best Alternative to a Negotiated Agreement (BATNA)
- Build common ground and consensus in your negotiation strategies
- Negotiate with experts to develop your skills for success

## COURSE OUTLINE

### 1 - NEGOTIATION INTRODUCED

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- Identifying Integrative and Distributive Negotiation Types
- Understanding the Three Phases of Negotiation
- Strengthening Negotiation Skills

### 2 - PREPARING FOR YOUR NEGOTIATION

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- Establishing Personal Boundaries
- Deciding on Your WATNA and BATNA and Negotiating Based on Them
- Preparing and Sticking to Your Plan
- Negotiation Strategies

### 3 - NEGOTIATION PROCESS FOR SUCCESS

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- Setting the Time and Place
- Avoiding Negative Environments
- Establishing Common Ground and Building Momentum
- Creating a Negotiation Framework, Agreeing on Issues, and Maintaining a Positive Framework
- Working through the Five Steps of Negotiation

## **4 - BEST PRACTICES**

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- Starting Off on the Right Foot
- What to Share and What to Keep to Yourself
- Knowing What to Expect
- Utilizing the Top Ten Negotiation Techniques
- Managing an Impasse

## **5 - NEGOTIATION TOOLS & TECHNIQUES**

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- Reviewing the Three Ways to See Your Options
- Creating a Mutual Gain Solution
- Agreeing on Wants – Working with What You Want and What They Want

## **6 - CONSENSUS & AGREEMENT**

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- Building Consensus
- Consolidating and Finalizing an Agreement
- Controlling Your Emotions and Dealing with Personal Attacks
- Walking Away When Necessary

## Project Management Fundamentals 1 day

In this course, students will identify effective project management practices and their related processes. They will examine the elements of sound project management and apply the generally recognized practices to successfully manage projects.

### *Learning Objectives*

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

- identify the key processes and requirements of project management.
- initiate a project.
- plan for time and cost.
- plan for project risks, communication, and change control.
- manage a project.
- execute the project closeout phase.

## COURSE OUTLINE

### **1 - GETTING STARTED WITH PROJECT MANAGEMENT**

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- Describe a Project
- Describe the Project Management Life Cycle
- Identify the Role of a Project Manager

### **2 - INITIATING A PROJECT**

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- Determine the Scope of a Project
- Identify the Skills for a Project Team
- Identify the Risks to a Project

### **3 - PLANNING FOR TIME AND COST**

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- Create a Work Breakdown Structure
- Sequence the Activities
- Create a Project Schedule
- Determine Project Costs

### **4 - PLANNING FOR PROJECT RISKS, COMMUNICATION, AND CHANGE CONTROL**

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- Analyze the Risks to a Project
- Create a Communication Plan
- Plan for Change Control

## **5 - MANAGING A PROJECT**

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- Begin Project Work
- Execute the Project Plan
- Track Project Progress
- Report Performance
- Implement Change Control

## **6 - EXECUTING THE PROJECT CLOSEOUT PHASE**

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- Close a Project
- Create a Final Report

## **Project Management Essentials 3 day**

If you are taking this course, you probably have some exposure to managing projects, or you may be considering embarking on a career as a professional project manager. Your ability as a project manager to demonstrate best practices in project management on the job is becoming the standard to compete in today's fast-paced and highly technical workplace. In this course, you will apply the generally recognized practices of project management to successfully manage projects.

Project managers are always under severe pressure to complete projects on time and within budget. However, most projects fail to meet these demands, and, as a result, many projects are terminated early. Successful project management requires knowledge and experience. This course is designed to provide you with the skills needed to be a successful project manager in today's rapidly changing world. The skills and knowledge you gain in this course will help you avoid making costly mistakes and increase your competitive edge in the project management profession.

### *Learning Objectives*

In this course, you will apply recognized practices of project management to manage a project from start to finish.

- You will:
- Identify the basic concepts of project management.
- Launch a project.
- Estimate project work.
- Create a project schedule.
- Plan project costs.
- Plan for project risks.
- Plan for project quality and compliance.
- Manage human and physical resources for the project.
- Manage project procurements.
- Plan for change management and monitor the project scope.
- Monitor and optimize project schedule and cost.
- Monitor the quality of the project work and the risks involved.
- Plan communication strategies and manage stakeholder relationships.
- Close a project.

## COURSE OUTLINE

### **1 - GETTING STARTED WITH PROJECT MANAGEMENT**

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- Define Project Management Basics
- Identify Influencing Factors
- Define Project Management Certifications

### **2 - LAUNCHING PROJECTS**

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- How Organizations Choose the Right Project
- Identify Project Stakeholders and Their Expectations
- Authorize a Project
- Identify the Project Scope

### **3 - ESTIMATING PROJECT WORK**

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- Develop a WBS
- Identify the Relationships Between Work Packages
- Identify Resources
- Estimate Time

### **4 - CREATING A PROJECT SCHEDULE**

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- Develop a Project Schedule
- Create a Schedule Baseline

### **5 - PLANNING PROJECT COSTS**

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- Establish Project Costs
- Establish the Cost Baseline
- Reconcile Funding and Costs

### **6 - PLANNING FOR RISK**

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- Create a Risk Management Plan
- Identify Risks and Their Causes
- Analyze Risks
- Develop a Risk Response Plan

### **7 - PLANNING FOR QUALITY AND COMPLIANCE**

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- Deliver the Desired Project Results
- Verify Compliance Requirements

### **8 - MANAGING THE PROJECT TEAM**

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- Plan Your Project Team
- Assemble the Team
- Develop the Team
- Manage the Team

## **9 - MANAGING PROJECT PROCUREMENTS**

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- Plan for Project Procurements
- Obtain Responses from Vendors
- Select the Right Vendor
- Manage Vendors and Procurements

## **10 - MANAGING CHANGE DURING PROJECT EXECUTION**

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- Prepare for Project Execution
- Manage Project Changes
- Monitor the Project Scope

## **11 - MONITORING AND CONTROLLING PROJECT SCHEDULE AND COST**

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- Monitor and Control the Project Schedule
- Optimize the Project Schedule
- Monitor and Control Project Cost

## **12 - MONITORING AND CONTROLLING RISK AND QUALITY**

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- Monitor and Control Risks
- Put Quality Plans into Action
- Control Project Quality

## **13 - COMMUNICATING AND REPORTING**

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- Communicate During a Project
- Distribute Project Information
- Manage Stakeholder Relationships and Expectations
- Report on Project Performance

## **14 - CLOSING THE PROJECT**

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- Deliver the Final Product
- Close Project Procurements
- Close the Project

## **BA30 – Foundations of Business Analysis 4 day**

The course provides students a clear understanding and total immersion into all of the facets of the business analyst role, including a thorough walkthrough of the various domain/knowledge areas that comprise the business analysis profession. Students are provided an opportunity to try their hand at several business analysis techniques for eliciting, analyzing, and modeling requirements. The business analysis work performed in strategy analysis and solution evaluation, which is most often the least familiar to business analysts, is thoroughly presented and explored. Students completing this course will be well equipped with new skills and knowledge that can be immediately applied on current and future projects.

This course is aligned to and satisfies the professional development hours required to take the Entry Certificate in Business Analysis™ (ECBA™) certification.

### *Learning Objectives*

Obtain a thorough understanding of the core responsibilities of the business analyst

- Understand the main professional associations and standards supporting business analysts in the industry
- Discuss and explore the components of each of the domains/knowledge areas that comprise the work of business analysis
- Recognize the importance of properly defining the business need prior to engaging in requirements activities
- Formulate a strong understanding of the concepts that comprise strategy analysis
- Obtain knowledge of and experience with the important work of stakeholder analysis
- Decipher between project and product scope and successfully use models to communicate scope
- Thoroughly understand and identify the various requirements categories and be able to recognize requirements of various types
- Develop interviewing skills and explore ways to plan and structure interviews
- Examine different forms of requirements documentation
- Explore elements of communication, conflict, and issue management
- Obtain a solid understanding of the concepts and activities involved in solution evaluation
- Obtain hands-on experience with a number of business analysis techniques for eliciting, analyzing, and modeling requirements

## COURSE OUTLINE

### **1 - INTRODUCTION TO BUSINESS ANALYSIS**

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- What is Business Analysis?
- Benefiting from business analysis
- Business analysis and project success
- Challenges of business analysis
- Discussions: Who performs business analysis functions in your organization? Exploring solutions options and your biggest challenges on past projects

### **2 - A CLOSER LOOK AT THE BUSINESS ANALYST ROLE**

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- Definition of business analyst
- Responsibilities of a business analyst
- The BA/PM roles
- IIBA/PMI and the goals of a professional association
- Purpose for having a BA standard
- IIBA's BABOK® Guide and PMI's Practice Guide in Business Analysis
- Business analysis core concepts
- Business analysis perspectives
- IIBA and PMI certifications for business analysts
- Workshop: Introduction to Case Study

### **3 - STRATEGY ANALYSIS AND CHANGE**

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- Define Strategy Analysis
- When to perform Strategy Analysis
- Business models
- Defining the business need
- Root cause analysis
- 5 Whys
- Fishbone diagram
- Defining business requirements?
- Discussions: Who is involved in strategy analysis in your organization?
- Workshops: Create a Business Model, Define the Business Need, Create a Fishbone Diagram, and Write Business Requirements

### **4 - DEFINING A CHANGE STRATEGY**

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- Define change strategy
- Gap analysis
- Determining solution options
- Enterprise readiness
- Cultural fit
- Operational and functional analysis
- Impact analysis
- Transitioning to the future state

## 5 - STAKEHOLDER ANALYSIS

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- What is a stakeholder?
- The importance of stakeholder analysis
- Stakeholder identification
- Stakeholder types
- Tips/techniques for identifying analyzing stakeholders
- Keeping track of stakeholders
- Workshop: Identify Stakeholders

## 6 - UNDERSTANDING & DEFINING SOLUTION SCOPE

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- Defining solution scope
- Techniques to use
- Project scope versus product scope
- Finding solution boundaries
- What is a feature?
- Identifying key features
- Discussion: Identifying Solution Scope
- Workshops: Draw a Context Diagram & Defining Scope with Features

## 7 - UNDERSTANDING REQUIREMENTS

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- Project roles involved in requirements activities
- Requirements types
- Assumptions and constraints
- Business rules
- Decision tables and inference rules
- Requirements vs. business rules
- Requirements vs. specifications
- Discussions: Requirements and business rules
- Workshops: Define a Business Rule and write requirements

## 8 - BUSINESS PROCESS MODELING

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- Why do we model processes?
- What is Business Process Management?
- Using a modeling notation
- "As Is" vs. "To Be" modeling
- Why use BPMN?
- Basic BPM notation
- Developing a business process model
- Using a facilitated session
- Business Process Modeling – A case study
- Developing a Business Process Model
- Workshop: Create a Business Process Model

## 9 - PREPARING FOR REQUIREMENTS ELICITATION

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- Types of elicitation techniques
- Interviewing – what and why?
- Preparing for an effective interview
- Selecting the right interviewees
- Types of questions to ask
- Sequencing of questions
- Discussion: Elicitation Techniques You Have Used
- Workshop: Planning for an Interview

## 10 - ELICITATION USING INTERVIEWS AND WORKSHOPS

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- Conduct the Interview
- Establishing rapport with stakeholders
- Active listening and listening styles
- Workshops and getting the right people
- The role of the facilitator
- The brainstorming technique
- Decision rules and reaching consensus
- Avoiding Groupthink
- Encouraging participation
- Managing meetings and conflict
- Workshop: Conduct an Interview

## 11 - CONFIRMING ELICITATION RESULTS

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- Defining requirements analysis
- Prioritizing requirements (MoSCoW, Timeboxing, Voting, etc.)
- Documenting requirements
- Other uses for specifications and models
- Unified Modeling Language (UML®)
- Explaining user stories
- The traceability matrix
- Communicating requirements
- Workshop: Analyzing Requirements, Identifying User Stories, Tracing Requirements, and Obtaining Approval

## 12 - ANALYZING REQUIREMENTS WITH USE CASES

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- What is an actor?
- Types of actors
- Defining actors
- Locating use cases
- Use case diagrams
- Use case tips
- Defining and identifying scenarios
- Parts of a use case
- Defining primary, secondary actors and pre and post conditions
- Best practices for writing use cases
- Template: Use Case Specification
- Workshop: Drawing a Use Case Diagram and writing the Main Success Scenario

- Scenarios and flows
- Alternate and exception flows
- Alternate scenario post conditions
- Guidelines for Alternate flows
- Examples of alternate and exception flows
- Workshop: Writing Alternate and Exception Flows

### **13 - DOCUMENTING REQUIREMENTS**

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- How requirements relate to use cases
- Writing Non-Functional requirements
- User Interface Requirements
- Reporting requirements
- Data requirements
- Data accessibility requirements
- Business requirements document (BRD)
- BRD vs the Functional Requirements
- Verifying Requirements
- Quality attributes
- Purpose of the requirements package
- BA Deliverables across knowledge areas/domains
- Planning BA deliverables
- Workshops: Develop a User Interface and Verifying Requirements

### **14 - MANAGING AND COMMUNICATING BUSINESS ANALYSIS INFORMATION**

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- Business analysis communication
- The business analyst's role in communication
- Forms of communication
- 7Cs of communication
- Symptoms of information overload
- Information mapping
- Presentation and common elements
- Requirements walkthroughs
- Conflict and issue management
- Conflict resolution techniques

### **15 - EVALUATING THE SOLUTION**

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- Understanding solution evaluation
- Verification vs. validation
- Timing of solution evaluation
- Planning solution evaluation
- Performing solution evaluation
- Using existing metrics
- Evaluating long term performance
- Qualitative vs. Quantitative measures
- Tools and techniques used in solution evaluation
- Comparing expected vs. actuals
- When variances occur
- Proposing recommendations to address variances
- Communicating evaluation results

## 16 - ADDITIONAL RESOURCES

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- Helpful links for obtaining additional business analysis information

## Data Analysis and Visualization with Microsoft Excel 2 day

Analyzing data to find issues, insights and opportunities, is now a critical part of many job roles. Beyond the analysis, data analysts in all job roles must be able to effectively present and communicate their findings in visually compelling ways.

Microsoft® Excel® is designed for this purpose. Excel can connect to a wide range of data sources, perform robust data analysis and create diverse and robust data-backed visualizations to show insights, trends, and create reports. These capabilities enable people who use Excel for data analysis to turn data into thoughtful action.

### *Learning Objectives*

In this course, you will analyze and visualize data using Microsoft Excel and associated tools. You will:

- Perform data analysis fundamentals.
- Visualize data with Excel.
- Analyze data with formulas and functions.
- Analyze data with PivotTables.
- Present visual insights with dashboards in Excel.
- Create geospatial visualization with Excel.
- Perform statistical analysis.
- Get and transform data.
- Model and analyze data with Power Pivot.
- Present insights with reports.

## COURSE OUTLINE

### 1 - DATA ANALYSIS FUNDAMENTALS

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- Introduction to Data Science
- Create and Modify Tables
- Sort and Filter Data

### 2 - VISUALIZING DATA WITH EXCEL

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- Visualize Data with Charts
- Modify and Format Charts
- Apply Best Practices in Chart Design

## **3 - ANALYZING DATA WITH FORMULAS AND FUNCTIONS**

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- Analyze Data with Formulas and Named Ranges
- Analyze Data with Functions
- Implement Data Validation, Forms, and Controls
- Create Conditional Visualizations with Lookup Functions

## **4 - ANALYZING DATA WITH PIVOTTABLES**

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- Create a PivotTable
- Analyze PivotTable Data

## **5 - PRESENTING VISUAL INSIGHTS WITH DASHBOARDS IN EXCEL**

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- Visualize Data with PivotCharts
- Filter Data Using Slicers and Timelines
- Create a Dashboard in Excel

## **6 - CREATING GEOSPATIAL VISUALIZATIONS WITH EXCEL**

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- Create Map Charts in Excel
- Customize Map Charts in Excel

## **7 - PERFORMING STATISTICAL ANALYSIS**

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- Visualize Trendlines and Sparklines with Excel
- Analyze Data with the Data Analysis ToolPa

## **8 - GETTING AND TRANSFORMING DATA**

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- Connect to Data with Queries
- Clean and Combine Data
- Shape and Transform Data

## **9 - MODELING AND ANALYZING DATA WITH POWER PIVOT**

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- Install Power Pivot in Excel
- Create Data Models with Power Pivot
- Create Power Pivots
- Perform Advanced Data Analysis and Visualization

## **10 - PRESENTING INSIGHTS WITH REPORTS**

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## **BA01 - Business Analysis Essentials 2 day**

This is an introductory course designed to provide students with a basic understanding of the benefits, functions and impact a business analyst has within an organization. The course discusses the business analysis process as it is applied throughout a project as well as the pre-project activities that comprise strategy analysis. Students learn how a business analyst supports the project throughout the solution development life cycle, from defining business needs and solution scope to validating that requirements have been met in the testing phase and ensuring the solution continues to provide value after implementation.

### *Learning Objectives*

Understand the role of the business analyst

- Discuss industry standards/resources for obtaining more information about business analysis
- Acquire a solid understanding of the various tasks/activities that comprises business analysis
- Recognize the pre and post project business analysis activities
- Learn how to plan, elicit, analyze, model, and test requirements

## **COURSE OUTLINE**

### **1 - INTRODUCTION TO BUSINESS ANALYSIS**

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- Business analysis defined
- The activities that comprise business analysis
- IIBA/PMI and the goals of a professional association
- IIBA's BABOK® Guide and PMI's Practice Guide in Business Analysis
- Exercise: Requirements challenges

### **2 - THE IIBA™ AND THE ROLE OF THE BUSINESS ANALYST**

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- Business analyst defined
- BA role vs. PM role
- Importance of communication/collaboration
- The deliverables produced as part of business analysis
- The BA career path
- Exercise: Review case Study

### **3 - STRATEGY ANALYSIS AND CHANGE**

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- The definition of Strategy Analysis
- Components of Strategy Analysis
- Identifying stakeholders and business needs
- Exercises: Business Need development and RACI Stakeholder Identification

### **4 - UNDERSTANDING AND DEFINING SOLUTION SCOPE**

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- Defining Solution Scope
- Project scope vs. product scope
- Defining a problem statement
- Techniques for defining scope
- Exercises: Conduct a brainwriting session and create a context diagram
- Optional exercise: Create a Use Case Diagram

### **5 - UNDERSTANDING REQUIREMENTS**

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- Define the term requirement
- Understand requirement types
- Present the requirements process
- Requirements vs. specifications and business rules
- Exercise: Identify Requirements

### **6 - PLANNING & ELICITING REQUIREMENTS**

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- The Requirements Work Plan (RWP)
- Components of the RWP
- Identifying good questions for elicitation
- Active listening
- Categories and types of elicitation techniques
- Exercise: Planning for elicitation

### **7 - ANALYZING & DOCUMENTING REQUIREMENTS**

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- Understanding requirements analysis
- The Business Requirements Document (BRD)
- The BRD vs. the functional requirements specification
- BRD components
- The purpose of packaging requirements
- Exercise: Analyzing Requirements

## **8 - ELICITATION & PROCESS MODELING**

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- Why models are created
- Objectives of modeling
- What is process management
- Understanding process modeling
- Modeling using BPMN
- AS-IS vs. TO-BE modeling
- BPMN subclasses
- BPMN simple structure
- Prototyping
- Business Process Modeling case study
- Exercises: Modeling and create a Prototype of your application

## **9 - VERIFYING & VALIDATING REQUIREMENTS**

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- The difference between validation and verification
- Characteristics of good requirements
- Risks associated with requirements
- Types of testing approaches
- Creating a test plan
- Requirements traceability matrix
- Verified and validated requirements
- Exercise: Testing Requirements

## **10 - ADDITIONAL RESOURCES**

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- Helpful links for obtaining additional business analysis information

## **Building Successful Work Relationships 3 Days**

In this course, students will learn how to build co-operative trust-based relationships that enable them to work productively with other professionals, clearly communicating and respectfully harnessing their distinctive contributions.

### *Learning Objectives*

After completing this course, students will know how to:

- Describe the importance of effective work relationships
- Demonstrate professionalism through your behavior
- Identify the interdependencies between you and your colleagues
- Communicate effectively to create rapport and connect with others
- Build and maintain your network of professional relationships
- Use quality dialogue to focus discussion toward mutual outcomes
- Develop collaborative working relationships that achieve results

## **COURSE OUTLINE**

### **1 - THE IMPORTANCE OF WORK RELATIONSHIPS**

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- Supporting Effective Teamwork
- Understanding the Value of Relationships

### **2 - INTERPERSONAL DYNAMICS**

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- Working with Ego States
- Being Effectively Assertive

### **3 - DEMONSTRATING PROFESSIONAL BEHAVIOR**

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- Developing Professionalism
- Valuing Respect, Reliability, and Results
- Comparing Attitude, Action, and Effect

### **4 - MAPPING YOUR WORK NETWORK**

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- Identifying Interdependencies
- Focusing on Purpose

### **5 - BRIDGING WORK STYLES**

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- Identifying and Accepting Differences
- Adapting to Different Work Styles

## **6 - BUILDING YOUR NETWORK**

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- Appreciating Needs and Values
- Managing Your Network and Your Reputation

## **7 - COLLABORATING FOR SUCCESS**

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- Fostering Collaboration
- Creating a Working Agreement
- Contributing to a Collaborative Culture

## **Evolving into the Manager Role 3 day**

In this course, students will learn how to confidently acquire and build these skills through relevant discussions, team and individual activities.

### *Learning Objectives*

After completing this course, students will know how to:

- Describe the roles that a manager has in an organization
- Identify and nurture talent in your team
- Build a management vision for success
- Create strategies to motivate and empower your team
- Combine leadership qualities and influence skills to motivate your team
- Plan and manage effective meetings

## **COURSE OUTLINE**

### **1 - THE MANAGER'S ROLE**

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- Distinguishing a Manager's Role from Function
- Understanding Interpersonal, Informational, and Decision Roles

### **2 - BUILDING A SHARED VISION**

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- Defining a Shared Vision
- Building a Strong Vision
- Creating and Communicating a Vision Statement
- Identifying Benefits of Your Vision

### **3 - LEADERSHIP AND INFLUENCE**

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- Identifying the Characteristics and Qualities of a Leader
- Modeling the Way and Enabling Others to Act
- Encouraging Your Inner Innovator and Mastering the Art of Persuasion
- Creating Mutual Respect
- Effectively Communicating and Reasoning with Others

## **4 - NURTURING TALENT**

---

- Calibrating Talent
- Finding and Nurturing the Attributes that Meet Your Requirements
- Articulating Culture and Hiring for a Cultural Fit
- Looking to the Future – Developing and Executing a Plan
- Succession Planning
- Creating and Fostering Employee Engagement
- Coaching, Training, and Development

## **5 - DELEGATION AND EMPOWERMENT**

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- Working with Workgroups and Teams
- Delegating
- Progress Tracking and Reviewing Results

## **6 - BUILDING A BETTER MEETING**

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- Planning and Preparing a Meeting
- Identifying Proper Participants
- Creating an Agenda
- Evaluating the Use of Technology

## Effective Leadership through Coaching

The most successful leaders recognize that their success depends upon the success of those they lead. Enabling others to grow and fulfil their potential by coaching them to discover and apply their talents and strengths is a core competency of leadership

### *Learning Objectives*

After completing this course, students will know how to:

- Develop a positive partnership that supports employee growth
- Provide effective coaching and feedback within a relationship of mutual trust
- Agree appropriate performance goals using the SMART technique
- Clarify the current state or reality of your employees' situation
- Create options for your employee and develop them into a plan
- Motivate and support your employee to achieve their goals
- Recognize and remove any obstacles to employee success

## COURSE OUTLINE

### **1 - THE LEADER AS COACH**

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- Harnessing the Power of Coaching
- Recognizing Talent and Potential
- Identifying Values and Beliefs

### **2 - THE GROW MODEL**

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- Structuring the Coaching Process
- Applying GROW

### **3 - AGREEING ON THE DEVELOPMENT GOALS**

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- Providing Direction and Purpose
- Identifying Appropriate Goals

### **4 - CLARIFYING THE CURRENT REALITY**

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- Framing the Reality
- Generating Self-Awareness
- Overcoming Obstacles and Resistance
- Exploring the Past

### **5 - DISCUSSING OPTIONS**

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- Generating Options
- Choosing an Approach
- Structuring a Plan

## **6 - FINALIZING THE PLAN**

---

- Confirming the Will
- Selecting the First Step
- Motivating the Employee

## **7 - THE IMPORTANCE OF TRUST**

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- Avoiding Negatives in Coaching
- Enhancing Trust Relationships

## **8 - GIVING CONSTRUCTIVE FEEDBACK**

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- Structuring Feedback

## Leadership Excellence for Senior Management 3 day

To maximize performance and foster a healthy environment, senior managers must also motivate others, nurturing and utilizing the distinctive skills of each team member.

### *Learning Objectives*

After completing this course, students will know how to:

- Use wisdom and understanding to lead others
- Deliver constructive critiques to your staff
- More effectively coach and mentor your staff
- Develop new managers
- Better motivate your staff
- Navigate organizational politics

## COURSE OUTLINE

### 1 - LEADING OTHERS

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- Comparing Vertical and Lateral Hierarchies: Leading in Different Structures of Command and Control
- Leveraging Your Organization's Structure
- Knowing Your Employees – Developing Empathy
- Beginning with the End in Mind and Back-Casting to the Desired Future State
- Setting S.M.A.R.T. Goals
- Earning Your Team's Trust with Honesty, Reliability, Availability, and Openness

### 2 - STRATEGIES FOR COURSE CORRECTION

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- Lighting a Fire: Motivating, Guiding, and Inspiring
- Resolving Conflict: Forcing, Accommodating, Avoiding, Compromising, and Collaborating
- Changing the Script: Trusting Your Team, Empowering Delegation, Celebrating Success, and Building & Reinforcing Your Team
- Defining Team Roles and Creating a Balanced Team

### 3 - EFFECTIVE COACHING AND MENTORING

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- Providing Clear and Timely Feedback
- Creating a Supportive Environment
- Building a Mentorship Plan - Mentoring for Success

## **4 - TRAINING NEW MANAGERS**

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- Preparing, Developing, and Supporting New Managers
- Defining and Building Competencies
- Documenting Best Practices while Rewarding and Emulating Effective Managers
- Encouraging a Peer Network

## **5 - MOTIVATION**

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- Understanding the 8 Level Hierarchy of Needs
- Managing Across Generations
- Applying the CARE Model

## **6 - ORGANIZATIONAL POLITICS**

---

- Being Politically Savvy, Ethical, and Effective
- Building Political Intelligence
- Understanding the Landscape

## **7 - THE BIG PICTURE**

---

- Thinking Through the Elements of Management

## Providing Outstanding Customer Service 2 day

This course offers practical tools and techniques to win clients, create loyal advocates for your business, and deliver excellent customer service.

### *Learning Objectives*

After completing this course, students will be able to:

- Define customer service in relation to both internal and external customers
- Recognize how your attitude affects customer service
- Identify your customers' needs
- Generate repeat business with outstanding customer service
- Build goodwill through in-person customer service
- Provide outstanding customer service over the phone
- Connect with customers through online tools
- Deal effectively with difficult situations

## COURSE OUTLINE

### **1 - CUSTOMER SERVICE – A BASELINE**

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- Recognizing Your Customers
- Understanding Your Role in Customer Service

### **2 - DEVELOPING A CUSTOMER SERVICE MIND-SET**

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- Leveraging Your First Impression
- Feeling Positively About Customers
- Mastering Moods and Emotions

### **3 - IDENTIFYING CUSTOMER NEEDS**

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- Understanding the Customer's Situation
- Avoiding Assumption and Prejudgment
- Meeting Basic Needs
- Seeking to Exceeding Expectations
- Building Repeat Relationships

### **4 - CONNECTING WITH THE CUSTOMER**

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- Achieving Authenticity through Body Language
- Responding Effectively to Problems
- Mastering Online Etiquette
- Seeking Customer Feedback

## **5 - DEALING WITH DIFFICULT SITUATIONS**

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- Effectively Addressing Complaints
- De-escalating Anger
- Establishing Common Ground
- Remaining Calm, Respectful and Objective

## **6 - EFFECTIVELY ADDRESSING COMPLAINTS**

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- Creating a Memorable Customer Experience

## Accomplishing the Results You Want 2 day

In this course, students will learn how to strengthen your leadership voice and foster employee buy-in to exceed expectations and achieve the most positive outcome.

### *Learning Objectives*

After completing this course, students will know how to:

- Develop a leadership style that gets results
- Employ suitable motivation techniques for your team
- Adapt your communication style and use influence skills to drive direction
- Empower your team to get the results you want

## COURSE OUTLINE

### 1 - LEADERSHIP STYLE GUIDE

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- Exploring the 6 Leadership Styles

### 2 - MOTIVATION

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- Understanding Varying Needs
- Framing Motivators and Dis-satisfiers

### 3 - COMMUNICATION

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- Applying Various Communication Styles
- Comparing the 4 Style Traits
- Adapting to Differing Communication

### 4 - STRATEGY AND RESULTS

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- Using Strategic Drivers
- Linking Strategy to Operations
- Relating Strategy to Results

### 5 - BUILDING A BETTER TEAM

---

- Driving Team Performance
- Developing Trust and Respect

### 6 - INFLUENCE SKILLS

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- Differentiating between Ethical and Unethical Influence
- Developing Your Communication and reasoning Skills

## **7 - NEGOTIATION – GETTING TO YES**

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- Understanding the Phases of Negotiation
- Developing Principal Negotiation Skills
- Planning Negotiation
- Dealing with Tough Questions
- Getting to a Mutually Beneficial Solution

## **8 - ENABLING OTHERS TO ACT**

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- Empowering Others
- Managing the Workload
- Delegating to Workgroups and Teams
- Avoiding Wasted Time and Energy
- Following-Up to Ensure Success

## **9 - PUTTING IT ALL TOGETHER**

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- Assembling the Pieces to Achieve the Whole
- Applying Skills to get Results

## **Communicating Across Your Organization 3 day**

In this course, students will learn to build trust and commitment, motivating others through respectful and authentic interactions.

### *Learning Objectives*

After completing this course, students will know how to:

- Identify the essential elements of effective communications within an organization
- Use knowledge of your self to build effective communication strategies
- Build communication strategies that leverages interpersonal and organizational awareness
- Apply effective facilitation skills

## **COURSE OUTLINE**

### **1 - ELEMENTS OF COMMUNICATION**

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- Moving from Classical to Human Relations Communication
- Applying Communication Skills Across Mediums

### **2 - SELF-AWARENESS**

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- Weaving Together the 4 Elements of Self
- Managing the Physical Self
- Practicing Emotional Intelligence
- Understanding Those Who Think Differently
- Adapting to the 3 Learning Styles
- Cultivating Positivity

### **3 - INTERPERSONAL SKILLS**

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- Improving Listening with 7 Basic Skills
- Applying Verbal and Nonverbal Communication Skills
- Communicating Through Body Language

### **4 - ORGANIZATIONAL AWARENESS**

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- Enhancing Organizational Culture
- Leveraging a Good Culture for Effective Communication

### **5 - FACILITATION**

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- Understanding the Role of a Good Facilitator
- Becoming a Process Expert
- Focusing Your Facilitation Efforts

## 6 - COMMUNICATION STRATEGIES

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- Choosing a Communication Method
- Reducing the Impact of Language Barriers
- Approaching Cultural, Regional, and Time Zone Differences
- Communicating Across Your Entire Organization

## **Navigating The Modern Workforce - Diversity, Culture, Generations**

### **2 day**

In this course, students will learn how to capitalize on the strengths of your diverse team while directing and guiding them to even greater achievements.

### *Learning Objectives*

After completing this course, students will know how to:

- Learn to lead in a world of diversity
- Engage and empower our multi-generational workforce
- Leverage culture as the new strategic differentiator
- Develop your path to leadership success

## **COURSE OUTLINE**

### **1 - A COMPLEX WORLD OF DIVERSITY**

---

- Working in Fluid Dynamic Environments
- Understanding the New Transient Workforce
- Addressing the Need for a New Type of Leadership
- Leading with Authenticity
- Developing Required Skills and Competencies
- Decentralizing Power

### **2 - MAKING DIFFERENCE YOUR STRATEGIC ADVANTAGE**

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- Engaging in the 21st Century
- Measuring Engagement and Taking Advantage of High Engagement
- Overcoming Challenges to Employee Engagement
- Embracing Difference and Bridging Boundaries
- Developing Cultural Intelligence and Responding Effectively to Cultural Differences
- Applying SCARF to Direct Behavior

### **3 - LEVERAGING CHANGE AS THE NEW NORMAL**

---

- Understanding and Applying Emotional Intelligence
- Motivating Others
- Key Areas of Interest - Behavioral and Cognitive, Psychodynamic and Humanistic, and Personality Types
- Developing Your Leadership Psychological Toolkit
- Identifying Drivers – Desires and Expectations
- The Impact of an Environment of Trust
- Meeting the Needs of the Social Brain
- Promoting Involvement

## 4 - CREATING LEADERS FOR THE FUTURE

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- Facing the Challenges of a Modern Leader
- Avoiding Cultural Pitfalls
- Creating a Common Culture for All
- Leading Fluid Teams
- Seeking Diverse Perspectives
- Soliciting Feedback
- Utilizing Various Leadership Styles – Storytelling, Adaptive, and Connective
- Building a Sustainable Vision, Developing a Path, and Creating a Passion for Excellence

## **Business Acumen For Leaders 2 day**

Students will learn to understand the mechanics of the organization – reading and interpreting financials, making sound business decisions, and setting a course – while also developing the skills to guide and direct your workforce.

### *Learning Objectives*

After completing this course, students will know how to:

- Recognize the importance of the big picture in business planning
- Leverage financial information to make sound business decisions
- Identify the importance of other financial levers to your business
- Understand the importance of ethics on long term business success
- Appreciate how business etiquette affects your organizational success

## **COURSE OUTLINE**

### **1 - GAINING A WIDER PERSPECTIVE**

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- Understanding Business Acumen
- Improving Long and Short Term Interactions
- Finding and Recognizing Growth Opportunities
- Making Mindful Decisions
- How to Relate to Others

### **2 - UNDERSTANDING THE NUMBERS**

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- Developing, Defining, and Reporting Key Performance Indicators (KPIs)
- Keeping Up with the Business
- Understanding Sales, Costs, and Profit Margin
- Monitoring Assets, Liabilities, Equity, and Financial Ratios
- Reviewing Income Statements, Balance Sheets, and Cash Flow Statements

### **3 - MANAGEMENT CONSIDERATIONS**

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- Recognizing Talent and Organizational Management
- Thinking Critically – Asking the Right Questions, Evaluating the Situation, and Making the Decision
- Leveraging the Organization – Investing in Employees and Customers, Process Improvement, and Goal Alignment

## **4 - BUSINESS ETHICS**

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- Ensuring Ethical Obligations are Met
- Understanding Roles and Responsibilities
- Balancing Personal and Organizational Ethics
- Managing Ethically – Maintaining the 4 P's

## **5 - BUSINESS ETIQUETTE**

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- Maintaining Etiquette across Communication Platforms – Email, IMs, and Telephone
- Following Etiquette in Meetings
- Delivering Etiquette in Customer Interactions

## **Making the Right Decisions Under Pressure 2 day**

In this course, students will learn to evaluate options, generate possible solutions, and decide on logical strategies.

### *Learning Objectives*

After completing this course, students will know how to:

- Make intelligent decisions with limited time and information
- Reframe issues to ensure greater problem solving accuracy
- Convert conflicting opinions into useful insights

## **COURSE OUTLINE**

### **1 - THE COMPLEXITY OF DECISION MAKING**

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- Establishing the Needs of the Organization
- Defining Organizational Objectives and Goals
- Measuring Your Goals
- Calculating Probabilities of Success

### **2 - DEALING WITH OPINION IN THE FACE OF UNCERTAINTY**

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- Understanding Theories of Decision-Making
- Avoiding Irrationality
- Being Aware of Risks
- Reframing the Options
- Asking the Right Questions
- Knowing What You Want
- Making Proper Comparisons
- Working with Stereotypes and Expectations

### **3 - ADAPTING DECISION STRATEGIES FOR A COMPLEX WORLD**

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- Reviewing Your Plans
- Engaging Stakeholders
- Enlisting Your Network
- Managing Risks
- Planning for Risks – Avoidance, Mitigation, Transference, and Acceptance
- Applying Complexity Theory and the Butterfly Effect
- Adjusting Decisions
- Building in Metrics & Measurements
- Monitoring Progress and Managing Risks
- Looking for Emerging Trends

## **Constructive Conflict Management 2 day**

In this course, students will learn to recognize the warning signs that precede quarrels and how to mitigate their impact, as well as constructive ways to harness the differences between team members and shift them toward productive, positive outcomes.

### *Learning Objectives*

After completing this course, students will know how to:

- Identify and manage sources of conflict
- Define an effective strategy to deal with conflict
- Implement a process to manage conflict situations
- Build civility in the workplace

## **COURSE OUTLINE**

### **1 - UNDERSTANDING CONFLICT**

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- Identifying the Causes of Conflict
- Harnessing the Benefits of Conflict
- Resolving Conflict
- Understanding the Key People in Conflict Resolution

### **2 - CIVILITY IN THE WORKPLACE**

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- Recognizing Uncivil Behavior
- Reaping the Benefits of Civil Behavior
- Working with Difficult People
- Identifying and Avoiding Incivility
- Creating, Implementing, and Enforcing a Civility Policy

### **3 - CONFLICT RESOLUTION PROCESS**

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- Making an Effective Atmosphere
- Developing Mutual Understanding
- Focusing on individual and Shared Needs
- Getting to the Root Cause
- Generating Options
- Building a Solution

## 4 - CONFLICT RESOLUTION STRATEGIES

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- Differentiating Resolution Strategy Versus Process
- Recognizing the Advantages and Disadvantages to Collaborating, Competing, Compromising, and Avoiding