



EQUIS CONSULTING

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**ENHANCING HUMAN PERFORMANCE...
Discovering the Solutions Within. TM**

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Mission...to discover together

The mission of Equis Consulting is to enable people to discover the possibilities of personal and organizational growth through the use of specialized client-based programs and individual training experiences. Equis Consulting is an expert in Training and Development and Performance Enhancement development, design, and delivery.

Consulting...to deliberate together

Equis Consultants draw upon 55 years of combined experience within the field of Organizational and Employee Development. The committed relationship we build with our clients becomes the catalyst for discovering a collective intelligence that will enable us to support cultural change and lasting development. To quote one of our clients, "Your flexibility, enthusiasm, commitment and sensitivity to our cultural needs are head and shoulders above the rest of the field."

We have leveraged our knowledge with our clients in the past to provide the following:

- Making Missions & Visions Matter
- Understanding & Improving Cultures
- Keeping People Interested & Around
- Assessing People's Skills
- Improving Teams' Relationships
- Assessing Employee Satisfaction
- Hiring, Developing, & Coaching High Performers
- Creating More Authentic & Effective Leaders
- Getting Real About Developing Employees
- Understanding How People Choose to Communicate

Understanding...to improve together

Rapid growth and/or corporate restructuring creates a new brand of challenges to companies who must keep moving forward while patching fractured infrastructures, processes, and workgroups. At times this may feel like, "changing the tires while the bus is still cruising down the highway."

In our search for solutions that matter, we combine traditional methods for gathering information with corporate counseling. Often the "presenting problem" is not the real issue that is driving motivations and behaviors. Throughout the discovery process, we honor people's need to feel safe, express frustrations, and have clearings to speak into. Together, disclosures are shared, discussed, and contemplated. These crucial conversations define the next course of action.

Developing...to perform together

The cost of hiring and developing the wrong person is high. Based on the behavioral theory that, "The best predictor of future performance is past performance," we will share our comprehensive interviewing and selection technique that identifies past patterns and trends of behavior.

Hiring all "A" players is nice in theory, but is usually limited by salary budgets and the availability of top performers. In most cases, employee development is the only alternative to raising the performance of average performers. We will help you identify the best blend of developmental opportunities for individuals.

Serving... to grow together

Equis Consulting offers a number of services to help our clients grow strong and successful organizations. In a partnership approach, Equis strives to become your company's premier Training and Development Department. Equis strives to make the process of service delivery so seamless that we are truly thought of as an integral part of the company. To this end, Equis constantly is adding services and processes to assist with this relationship.

▪ **Individualized Executive/Management Coaching (one-on-one)**

Respecting the awareness that becoming learned and achieving true wisdom is a life-long process that occurs within and outside of a given professional affiliation, Equis consultants draw upon more than 130 years of collective experience asking and sorting through the most challenging and yet interesting conversations life provides in balancing professional accountability with personal commitment. We will work to build a foundationally strong relationship with you that can support the creation of soul-searching questions and authentic dialogue necessary for you to reach your life goals.

▪ **Experiential Learning Workshops**

Equis workshops are designed to provide learners critical information in an environment that promotes individual and group exploration into the topic. Equis workshops are markedly different in that the workshop subject is provided in a structured setting to convey the necessary information and yet unstructured in the creative and conversational approach necessary for adult learners to own awareness powerfully enough that behavioral change can occur.

▪ **Course Development**

Although every one of our mainstream workshops is customizable for your particular culture, there will always be situations that will require the construction of a tailored workshop from the ground up. Equis consultants have a formal grounding in instructional design that enables us to effectively translate your training or development need into a course that will achieve the objective of your learners.

Past examples include:

- New Employee Orientation
- Train-the-Trainer Program for Call Centers
- Facilitating Performance Feedback Sessions
- Leadership Development Forum
- Management By Expectations

▪ **Consulting Services**

As clients approach various initiatives, it is often important to consider how (and if) development will play an important part in the success of the initiative. Through special focus group discussions, Equis is often able to tailor very specific approaches to capitalizing on various aspects of the initiative in question. Equis may suggest some changes, refer a client to a specific vendor, design a support course or system, etc. Often consultative discussions will arrive at a higher level of outcome by considering the social capital of the organization.

▪ **Development Planning**

By encouraging and supporting employees to discuss their concerns, challenges, grievances, and dreams; you will begin to see authentic accountability, excitement, and motivation spill over. In most cases, these conversations follow a simple theme; people have an inherent need to reflect, grow, develop, and become.

Providing continuous opportunities for people to reflect, grow, develop, and become is a great way to "keep everyone in the conversation." These development opportunities should be seen as campaigns rather than events. They aren't ends in themselves, but means to something that has no end...continuous development.

▪ **Assessment Services**

If you operate like most organizations, you're not assessing the knowledge and various perceptions that are inherent within the organization. In most cases it's the stuff that falls into that category of "We don't know what we don't know." That's called a blind spot and blind spots have the most potential to damage relationships and undermine productivity.

Equis Consulting can help you and your organization gain a clear picture of individual and organizational strengths and development needs by implementing various 360 instruments. Consultants will then work with you to interpret the findings in such a way that they will be an integral part of personal, professional, and organizational development throughout your organization.

▪ **Management Development Forum**

This program is designed for the continual development of supervisory and management personnel. Since time is such a precious commodity to business supervisors and managers, the program is designed to be scheduled over a period of time in topic driven modules of approximately 2 to 4 hours each. Clients may choose to schedule these modules each month or every other month. Topics have been selected especially to focus on the basic competencies and functions necessary for managers to succeed in this challenging business world. It is recommended that participants complete a 360-feedback process prior to beginning this program. This process helps them focus on the development areas of greatest personal need. Topics include:

- Motivation and Human Behavior (2 Hours)
- Verbal Communication (2 Hours)
- Constructive Criticism and Feedback (3 Hours)
- Interpersonal Communication Skills (3 Hours)
- Counseling and Coaching Skills (3 Hours)
- Progressive Discipline (2 Hours)
- Employee Development Skills (3 Hours)
- Performance Appraisal Skills (4 Hours)
- Compensation Management (2 Hours)
- Delegation Skills (3 Hours)
- Employment Interviewing Skills (4 Hours)
- Employment Documentation (3 Hours)
- EEO and Affirmative Action (4 Hours)
- Sexual Harassment (4 Hours)
- Labor Law (3 Hours)
- Elective Subjects (2 to 4 Hours each)

▪ **Developing the Leader Within**

Leadership development is quite different than management development. This program focuses on both classic and contemporary approaches to leading people to achieving greater results both personally and organizationally. Conducted in more of a collaborative experiential fashion, participants explore various competencies that have been successful for the world's most outstanding leaders in all fields. Books authored by such renowned authors as Robert Greenleaf, Kevin Cashman, Max DePree, Jim Kouzes, and Barry Posner are utilized for study and discussion. The program is designed to be implemented over a period of 2 to 3 years with 2-day exploratory sessions scheduled every quarter. It is recommended that participants complete a 360-feedback process prior to beginning participation in this program. Topics include:

- Foundations of Leadership
- Servant Leadership
- Leadership Competencies
- The Culture of Leadership
- Organizational Leadership
- Spirit of Leadership
- Leadership Characteristics
- Leadership Behaviors
- Leadership Measurement
- Roving Leadership
- Leadership Belief Systems
- Tribal Storytelling and Leadership
- Leadership from the Inside Out
- The Covenant of Leadership
- Leadership Accountability
- Continual Leadership Development

- **Training and Development Counsel**

Equis Consulting has discovered that often clients operate more successfully when they open a network and discussion with their training and development peers in other organizations. As a result, Equis sponsors a complimentary Training and Development Counsel Breakfast for our Training and Development Relationship Plan clients. These quarterly breakfasts can be accessed by attending in person at our location in Indianapolis, or by dialing into the discussion via a conference call. These sessions have been successful in “testing” the waters for clients who are thinking about various initiatives and training interventions. They also serve as a wonderful forum for networking to satisfy various training needs.

- **Equis Salon**

In an on-going effort to help individuals explore higher levels of conversation, Equis sponsors a Salon twice each year. This event is complimentary to our Training and Development Relationship Plan clients and focuses on exploring the depths of knowledge contained within all of us. Salons typically center on a specific topic and strive to bring together the collective intelligence and knowledge on that subject. On many occasions, the discussions will explore contemporary readings and theories through the use of the Socratic methodologies.

- **Presentation Equipment Services**

Clients typically elect to utilize their own equipment for presentations. However, Equis offers a preferred presentation equipment package to accompany all Equis programs. This package includes: Sony LCD video/data projector, Sony VCR or PANASONIC DVD player, Bose Radio, and necessary connection cables.

- **Client-Based Program Services**

Several clients have pre-existing training and development programs. Equis Consulting can assist in the facilitation, customization, and revision of these programs. Services include:

- Facilitation of a client's pre-existing program (non-Equis Consulting program). Clients may need to schedule extra days to “certify” and explain the programs content. Certification days will be billed at 50% of the daily facilitation fee.
- Development of complete training programs including tailored multi-media components such as CD-ROM, Digital Video Disc (DVD), PowerPoint, and VHS video programs. Certification of trainers and presenters may be included.
- Redesign of existing training programs. Under the client's direction, programs may be updated or completely revised with current information, new methodologies, etc.

- **Video Services**

Equis Consulting has assisted a number of clients with their training and development needs by recommending and coordinating a video-based product solution. Through it's management expertise and a network of premier providers, Equis can offer assistance in the following areas of video development:

- Video Production – The coordination of total video production including research, scripting, production, graphic coordination, editing, duplication, and distribution.
- Video Script Development – The development of script treatments and creative scripts for video productions. Creative writing is based on the underlying principles of proven instructional design.
- Video Script Revision – The writing or re-writing of existing scripts to incorporate new information and to facilitate the revision of the original video production.

Planning...to respond together

Continuous development and support has many advantages over traditional training:

- You have access to the "bigger conversations" that are occurring outside the lines
- You head-off challenges coming down the pike before they're out of control
- You create a culture that supports and encourages personal growth...all the time
- You support people's needs "just in time" with 24/7 support
- Your operation becomes preventative...costing less and creating less pain
- You avoid the "flavor-of-the-month" interventions that build skepticism
- You have a means to provide continuous support for your current initiatives
- You can budget your development costs and spread them out over time

When maximizing the training and development advantage, it is often advisable to "get creative". In an effort to assist clients, Equis Consulting has created a **Training and Development Relationship Plan (TDRP)**. This plan is very flexible and allows clients access to all services on a "on-call" basis. By implementing this plan, Equis becomes the "training and development department" within our client's organizations. Response time increases, scheduling is simplified, and budgeting is predictable. This is how it works:

- Clients select a specific monthly invoice amount.
- The plan is active for one-year and can be cancelled with 60 days notice.
- Plans are renewable from year to year.
- Clients that annually renew may carry over any unused dollars from the previous year.
- Non-renewal at the end of a year will not result in a credit for unused dollars in the previous year.
- All Equis services are available for use in the plan.
- Clients will receive monthly statements showing their usage for the month.
- Unused amounts will be rolled over to the next month for use in that month.
- Incidental expenses such as travel, meals, lodging, additional books and supplies are not included. These are billed separately on a per occurrence basis.

Seminar & Facilitation Services

We remain committed to delivering a high quality, tailored, training product to our clients. The following listing of seminars and facilitation services are available to assist your business in achieving excellence. These programs are currently developed and can be tailored to fit your specific needs with classroom activities and exercises demonstrating your philosophies and policies. Our video production capabilities also allow us to tailor your program more specifically by producing video-based modules to include in this training.

Assertive Communications

This seminar assists participants in understanding and practicing assertive behaviors in the modern business world. Styles of communication including assertion, non-assertion, and aggression are explained. Attendees will learn how to develop appropriate responses to difficult situations, thus gaining confidence in negotiation and persuasion.

Course Length: 1.5 days

You Will Learn How To:

- Identify your personal and professional preferred communication style
- Develop "I-Statements" that insure more positive outcomes
- Identify various communication behaviors and adjust your response accordingly
- Apply various assertive skills to specific business situations
- Recognize behaviors that are not conducive to positive behavioral outcomes

The Art of Coaching

You may hesitate to coach others because you lack formal training in psychology and counseling. The truth is, coaching is less about psychology and counseling and more about good interpersonal skills and planning. Skills such as: forging a partnership, inspiring commitment, growing skills, promoting persistence, and shaping the environment will be explored. Through unique and enjoyable classroom methodologies, participants will learn how to master the art of coaching in their everyday work environment.

Course Length: 1 day

You Will Learn How To:

- Identify effective coaching characteristics and coaching practices
- Identify and implement a strategy for effective coaching
- Complete a Personal Action Plan for yourself.
- Complete a Coaching Plan for a specific person(s).

Behavioral Interviewing

Two key factors shape the manner in which we interview potential employees in the business world today – legalities and true performance. Many managers fear the process because of the legal pitfalls present. Other managers don't feel you can truly predict a person's performance from an interview. This program discusses effective employment interviewing from these contexts. Behavioral interviewing techniques have been proven to be not only effective in predicting future performance, but also conceptually legal when measured against employment law.

Course Length: 1.5 day

You Will Learn How To:

- Plan a logical, structured interview that passes the legal litmus test
- Determine the presence or absence of a skill by utilizing behavioral example questions
- Obtain a more balanced picture of a candidate's skills by utilizing "contrary evidence" questioning
- Prepare an interviewing environment conducive to the sharing of pertinent job-related information
- Make a valid selection decision based on evidence, fact, and legal observations

Benchmarking for Results

Goals are useless unless they are compared to a standard. Benchmarking is the process of continuously comparing and measuring an organization or work process with those who lead the field in order to reveal information that will help improve the ultimate performance of the organization. Various techniques are presented in order to assist the attendees with this valuable and rewarding comparative process.

Course Length: 1 day

You Will Learn How To:

- Identify the various methods of benchmarking
- Develop a process of continuous improvement within your organization
- Apply the 6 key elements of benchmarking to your work units
- Use competitive, collaborative, and cooperative benchmarking when appropriate
- Apply the benchmarking process to a key practice within your company

Career Options

Choosing a career or changing career direction is one of life's most important decisions. Without solid information, that decision can be relegated to an aimless "shot in the dark" or happenstance. This workshop uses various assessment tools including the Myers-Briggs Type Indicator and the "Strong" Interest Inventory to help attendees identify viable career options.

Course Length: 1 day

You Will Learn How To:

- Discover your primary motivating values
- Identify work with which you have the most affinity
- Hone your focus to those occupations that best reflect your interests, values, and skills
- Explore the issue of personality and how it impacts career choice

Coaching the Sales Professional Using Caliper Results

The Caliper Test is a nationally recognized sales behavior instrument intended to give recipients specific feedback related to their individual strengths and development needs in the area of sales and marketing. This program's primary focus is to help organizations and individuals arrive at specific training and development strategies based on the results obtained from the Caliper Test. At the conclusion of this program, an organization will have a clear development plan for each of their sales personnel, plus specific skills that will assist in coaching these individuals toward achieving the development plan.

Course Length: 1 day

You Will Learn How To:

- Use the Caliper Test results to increase the skill level of your sales professionals
- Interpret the primary and secondary development needs of your sales force
- Plan and execute a productive development discussion based on the Caliper results
- Gather pertinent information and perceptions from your sales force
- Obtain firm commitments for sales skill development from each of your sales professionals

Conflict Management

This program discusses the basic nature of all business conflicts and examines their factors and stages. Primary focus is placed upon the actions appropriate to manage various types of conflicts.

Course Length: 1 day

You Will Learn How To:

- Determine your personal conflict management style through the use of the Thomas-Kilmann Conflict Mode Instrument
- Identify the benefits and the detrimental effects of conflict
- Assess the causes of conflict in groups and develop appropriate group management behaviors
- Develop collaborative skills that eliminate the negative effects of conflict
- Apply a process that will facilitate a more positive outcome in business situations

Connections

Connections is about creating relationships ...building partnerships for the future...and networking. Networking is still the most effective career management and job searching tool. The most successful candidates use a combination of self-marketing techniques to land new opportunities. This workshop will explore these techniques and take the mystery out of making the "right connections."

Course Length: 1 day

You Will Learn How To:

- Create a networking contact list
- Write a networking script
- Network for high-impact
- Explore career and job opportunities on the Internet
- Explore career and job opportunities at "job-fairs"

Differences: The Value of Diversity

This program is designed to increase the awareness level of the value of diversity in the business world. Through exercises and group discussions, participants examine current attitudes about diversity and identify the benefits of valuing diversity. Participants consider solutions to challenges posed by a diverse workforce. They will also develop individual action plans based on their own personal perceptions and strengths.

Course Length: 1 day

You Will Learn How To:

- Define “valuing diversity” and distinguish work force diversity issues
- Discover personal attitudes and prejudices regarding diversity issues
- Identify the benefits of valuing and encouraging diversity in the workplace
- Explore the common barriers that discourage diversity in the workplace
- Apply these concepts in accordance with your company’s human relations policy

Effective Meetings

Effective meetings can be the answer to many of the problems facing business today. Done ineffectively, meetings can be the biggest problem businesses have to face. This program teaches participants how to plan, conduct, and participate in meetings more productively. The seminar demonstrates useful techniques and proper preparation for shorter, more efficient, and potentially more satisfying meetings.

Course Length: 1 day

You Will Learn How To:

- Select the appropriate type of meeting based on the specific need
- Organize the most efficient and effective meeting plans and agendas
- Stimulate discussion during meetings
- Maintain control of the meeting while getting maximum involvement from others
- Arrange for follow-up and follow-through concerning meeting decisions

Employment Law

The modern environment of business management is unmistakably shaped by the legal world. Various laws such as Equal Employment Opportunity, Equal Pay Act, Americans with Disabilities Act, Equal Opportunity Acts, and a myriad of others dealing with sexual harassment, wrongful discharge, sexual orientation issues, and the redefined role of affirmative action create a virtual mine field for the manager in today’s business world. This program not only covers the specific laws, but also suggested methodologies for operating effectively within these legal parameters.

Course Length: 1 or 2 day versions available

You Will Learn How To:

- Use critical management skills based on the federal and state laws governing the employment relationship
- Know what to do – and what not to do – to avoid legal liability
- Clearly define your legal responsibilities as a manager
- Deal with the volatile nature of sexual and racial harassment issues
- Use a management guide to insure a comfortable workplace for all workers

Empowerment: The Manager's Role

Although the theory behind employee empowerment has been around for some time, more and more organizations are turning theory into reality by abandoning work situations that "dictate" working conditions and procedures. Organizations that add responsibility and flexibility to the workplace (the embodiment of empowerment) are finding that their productivity and profitability increase. This program explores various methods of incorporating empowerment into your organization.

Course Length: 1.5 days

You Will Learn How To:

- Tap the capacities of all people within your organization, not just those in leadership positions
- Analyze the ways in which an organization can empower its employees and motivate them to make good decisions
- Embrace the importance of letting problem-solving take place at the level where the solution is needed
- Create customer satisfaction by helping the customer succeed
- Develop your leadership skills around the concept of the customer-employee focus

Empowerment: The Team's Role

This program builds on the concepts established in Empowerment: The Manager's Role program. With a management support foundation firmly in place, this program translates the theory behind employee empowerment into specific team actions and procedures. This approach identifies work situations that focus on organizational bureaucracy and replaces them with the synergistic approach of a team focus. This program provides the tools to make empowerment happen.

Course Length: 1 day

You Will Learn How To:

- Develop the skills necessary to create a sense of entrepreneurship
- Partner with the management team to fulfill the company vision
- Recognize and use your personal "power base"
- Align systems, people, and procedures to service the customer
- Embody the changes necessary to achieve total ownership of the empowerment principles

Everyday Creativity

Everyday Creativity is about looking at the ordinary and seeing the extraordinary. We are all faced with challenges - at work and at home. How we view these challenges and devise their solutions can mean the difference between just getting by and being creatively successful. The enlightening and beautiful video, Everyday Creativity will be presented in the workshop. This video features the works of National Geographic photojournalist, Dewitt Jones. This workshop will empower you to apply simple, yet powerful creativity techniques to all aspects of your life.

Course Length: 1.5 hours

You Will Learn How To:

- Reframe problems into opportunities
- Discover more than one right answer to any given problem
- Look at situations from more than one perspective
- Recognize if you are operating from a place of "scarcity" or "abundance"

Facilitating Progress

Facilitation of groups is rapidly becoming one of the key interpersonal skills in business today. Contrary to the skill of presenting, leading, or training, facilitation requires a more subtle sense of control of the meeting discussion. This course teaches various techniques that facilitators can use to insure maximum participation, “buy-in”, and performance from each of their meetings. Brainstorming, questioning, constructive feedback, and consensus building are among the techniques presented in this course.

Course Length: 1.5 days

You Will Learn How To:

- Model the behaviors of an effective facilitator
- Plan and conduct effective group-centered meetings and discussions
- Handle difficult behaviors in a group setting
- Effectively facilitate a brainstorming meeting
- Give and receive feedback for improvement and feedback for reinforcement

First Impressions

Undoubtedly the most stressful part of a job transition, interviewing is a critical element of the process and an important self-marketing tool. Those who successfully navigate the interview to receive an offer will then move on to the challenge of negotiating the salary. This workshop is designed to help clients prepare for the interview, effectively interview, and then negotiate salary and other benefits.

Course Length: 1 day

You Will Learn How To:

- Prepare for an interview
- Present yourself professionally
- Interview effectively
- Respond to challenging interview questions
- Follow-up the interview in a powerful and effective manner
- Negotiate salary and fringe benefits

Goal Setting

Clearly defined goals enable organizations and people to focus on the effective use of resources and to chart a clear course for future development. This program teaches a step-by-step method for planning goals, objectives, and activities to achieve maximum benefit for the individual and the business community.

Course Length: 1 day

You Will Learn How To:

- Align visions, missions, goals, and objectives
- Develop your “focusing” skills to assist in goal attainment
- Use the goal setting process to measure and evaluate personal and professional performance
- Recognize the difference between “goal-orientation” and “task-orientation”
- Develop your interpersonal skills to assist in meeting organizational goals

Influence Without Authority

How do you influence others when you do not have direct authority over them? This program deals with the issue of personal power and influence in peer relationships. Concepts outlined in this course enable you to assess your current approach in influencing others. Additionally, participants will learn a model for effective influence while choosing the most appropriate leadership style given the particular situation.

Course Length: 1 day

You Will Learn How To:

- Identify your interpersonal influencing approach
- Analyze the use of situational leadership as an appropriate method of influencing others
- Phrase your ideas in clear, concise, persuasive language
- "Sell" your colleagues on the benefits of your concepts and ideas

Interpersonal Communication Skills

This seminar is designed to assist business leaders in the critical skill of effectively communicating one-on-one with employees, peers, and other business leaders. Basic information about the communication process and the barriers to effective communication are presented. Specific skills and techniques are taught for developing rapport, listening, interacting with others, sending clear messages, and giving effective feedback. Participants will engage in a business communication simulation during the course of this program.

Course Length: 2 days

You Will Learn How To:

- Discover your personal challenges as they relate to interpersonal skill usage in the business world
- Use a proven method regarding constructive feedback for others
- Apply the powerful communications tools of verbal inquiry and active listening
- Develop your directive and strategic leadership skills by using a personal business situation

Listening Skills

Where does understanding begin? Many times we find ourselves listening with the intent to respond instead of the intent to understand. Listening is more about understanding than it is hearing! This course is designed to give participants a number of tools to improve their abilities to concentrate, comprehend, and respond appropriately in the business environment. Attendees will learn to recognize the importance of active listening; identify the common barriers to listening; summarize critical content of spoken remarks; and interact with speakers to assure that the desired communication has taken place.

Course Length: 1 day

You Will Learn How To:

- Listen to "understand" not to respond
- Become a more active listener in business and personal environments
- Ask questions to expand your knowledge of the core concepts being communicated
- Increase the positive flow of information to insure your understanding
- Become more confident that you have understood another person's message correctly
- Separate message content from the sender's feelings

Management by Expectations

This course focuses on managing work performance by setting specific expectations developed from input received from customers, work teams, management, and organizational directions. The course begins with discussions on defining position responsibilities centered on the mission of the organization. It then proceeds with thorough explanation of writing objectives, performance standards, and action plans. Measurement and processes for reviewing performance results culminate the discussion of MBE. Methodologies on correcting poor performance results and rewarding peak performance are also reviewed.

Course Length: 2 Days

You Will Learn How To:

- Develop jointly agreed-upon objectives tied to the organizations mission and purpose
- Set up agreed-upon methods of accomplishing objectives and expectations
- Devise time schedules for completion of objectives and performance expectations
- Coordinate individual goals, objectives, and performance expectations with the position responsibilities and the organization's purpose
- Create individual career and job development plans that support the unit performance objectives
- Review individual performance expectation achievements and devise the appropriate action plan for performance enhancement or reinforcement

Management Effectiveness

This management human relations course discusses the powerful role that the leader of a business unit can have on the service and productivity levels of the workforce. Subjects explored in depth include contemporary management, planning, organizing, staffing, and the true art of leadership. Discussions and experiential exercises demonstrate advanced methodologies in motivation and inspiration.

Course Length: 2 days

You Will Learn How To:

- Recognize the importance of perceptual differences in managing people
- Develop approaches that will combat the group decision-making syndrome known as "groupthink"
- Make a direct business application of the human psychological principle known as the "self-fulfilling prophecy"
- Explore and apply the various sources of personal and organizational influence
- Use various methods of behavioral modeling to achieve maximum productivity

Management Problem Solving

The world of management is filled with decisions each day – employment decisions, financial decisions, production decisions, strategic decisions, etc. This course presents a number of different methodologies for a systematic approach to management problem solving and decision making. Utilization of business casework reinforces the concepts while allowing the participants to transfer the skill to the real business world.

Course Length: 1 day

You Will Learn How To:

- Discover insight into your own preferences as they regard problem-solving and decision-making
- Apply various problem-solving and decision-making models to contemporary management situations
- Use the "SNAP" (Structured Non-Argumentative Problem-Solving) model for group decisions
- Avoid the pitfalls of "Group Think" when participating in group decision-making
- Apply situational analysis tools to recognize the benefits as well as the detrimental effects of business problems

Managing Change

Change is one of the primary factors affecting modern organizational life. Because change is an inherent part of an organization, successfully managing change has become a major part of the contemporary business world. This seminar presents skills for coping with change and helping others adapt to the changing world around them. Redefining our goals as they relate to the changing world helps put us on the positive side of change. Active skills such as alliance building, commitment alignment, and perception assessment are included in this program.

Course Length: 1.5 days

You Will Learn How To:

- Recognize the various responses and levels of change
- Select the interpersonal tools necessary to assist with the adaptation process
- Develop your own leadership skills to assist others with change
- Make change work “for you” instead of “against you”
- Develop strategic change alliances by collecting and processing perceptions from others

Managing Diversity

The primary emphasis of this program is the extensive exploration of cultural and diversity systems and the key management and leadership capabilities needed to direct and maintain these systems. The program focuses on skills enhancement in the areas of diversity communication and motivation. Participants are presented with concepts that will allow them to become “diversity change agents” within their organization. Leadership skills and practices that encourage a more understanding and respectful workplace are also discussed.

Course Length: 2 days

You Will Learn How To:

- Assess your diversity management and leadership skills and make the necessary adjustments to succeed in a multicultural environment
- Recognize management behaviors that cultivate a more culturally aware organization
- Become a “diversity change agent” by building a foundation of awareness and discussion
- Communicate effectively across cultures and work effectively with a multi-lingual workplace
- Manage the daily challenges present in a multicultural workplace

Performance Management and the Appraisal Process

This course will reinforce skills to assist with the development of the corporation’s most valuable resource – its people. Introduction of effective methods for performance management, development, and appraisal will insure individual ownership and involvement during all stages of this process. Participants will be challenged to develop specific behavioral profiles for all positions that they manage. Profiling will be conducted in the course as an experiential exercise.

Course Length: 2 days

You Will Learn How To:

- Establish a work climate conducive to productive performance
- Initiate positive interpersonal communications regarding work performance
- Prepare specific performance guidelines and measurements for review
- Develop and coach your employees by preparing development plans that work
- Provide year-long reinforcement of performance objectives by maintaining performance-based reward systems

Power Presentations

Making a positive first impression is critical in business today. In fact, it may be the only chance you get at all! Learn how to prepare a presentation that has impact, involve the audience, anticipate group needs, create exciting visuals, and confidently operate all types of presentation equipment. Participants may apply these skills to their own business presentation.

Course Length: 2 days

You Will Learn How To:

- Add excitement and “punch” to each of your presentations
- Utilize presentation equipment properly and professionally
- Enhance and conduct a current program using some new presentation tricks
- Select appropriate icebreakers, transitions, and application exercises
- Provide the best environment and atmosphere for your presentation

Preventing Workplace Harassment

Workplace harassment has become a major issue in countries around the world. While sexual harassment has commanded much of the media’s attention, inappropriate behavior at work goes far beyond gender issues. This program explores the complex issue of harassment in the work environment and assists participants in developing behavioral skills that will help them manage harassment situations. Sexual, gender, age, racial, sexual orientation, religious and a number of other harassment situations are covered.

Course Length: 1 day

You Will Learn How To:

- Prevent harassment in the workplace by developing a clear understanding of what harassment is and how it impacts people, regardless of intent
- Explore the responsibility employees share to help maintain an environment free of harassment
- Relate harassing situations to supervisors, managers, human resources, and to the harassing party
- Support an environment where employees respect and value each other as individuals
- Set boundaries and confront harassing situations

Priorities

This course teaches various techniques and systems for “doing the right things right.” Numerous concepts and approaches are explored to facilitate change in non-productive work habits. Through self-analysis, participants discover their personal barriers for effectively managing multiple priorities. Several instruments are provided to help participants prioritize and manage their daily, weekly, and monthly activities.

Course Length: 1 day

You Will Learn How To:

- Create a more balanced professional and personal life by attending to your priorities
- Make the necessary behavioral changes to accomplish your key priorities
- Identify your time mastery level in twelve critical areas
- Enhance your multi-tasking abilities by working laterally rather than vertically
- Apply principles and systems that will improve your efficiency and effectiveness

Problem Analysis

This program teaches a number of systematic approaches to problem-solving. Emphasis is placed on gathering, classifying, and analyzing data that will assist with solving specific work-related problems. Participants engage in both individual and group creative problem-solving sessions during this training program.

Course Length: 1 day

You Will Learn How To:

- Identify various individual and group problem-solving styles
- Apply a number of problem-solving tools to solve business problems
- Explore the “pitfalls” and advantages to group problem-solving
- Use the principle of “organized disagreement” to explore alternative solutions
- “Sell” the solution to the business unit or unit leader

Professional Protocol

Perhaps the most overlooked topic of career management is business etiquette. It is often said, “Everything you do says something about you.” How do you appear to others?

How comfortable and confident are you when it comes to important business lunches and dinners? How are your written and verbal correspondences being received? Understanding professional protocol will give you the reassurance and experience to move forward with confidence.

Course Length: 1 day

You Will Learn:

- Written correspondence (including electronic communication)
- Spoken correspondence (including telephone etiquette)
- Dining etiquette (business meals, corporate events, and other informal events)
- Business dress options
- Professional presence
- General office etiquette

Professional Selling Skills*

Success in selling depends on the commitment to “helping the customer succeed.” Customers tell us how we can help them succeed when they express needs or specific goals and objectives. This program is accepted the world over as a fundamental foundation for all sales professionals. Professional Selling Skills explores the step-by-step process needed to help you and the customer succeed. Need satisfaction selling includes the skills of Opening, Probing, Supporting, Closing, Overcoming Customer Indifference, and Resolving Customer Concerns.

Course Length: 3 days

You Will Learn How To:

- Apply the concepts of need satisfaction selling to improve your “hit ratio”
- Probe to discover the need behind the need
- Make informed, mutually beneficial sales decisions
- Overcome customer indifference and resolve customer concerns
- Resolve customer skepticism and misunderstanding

*Special materials fee for this sales program.

Service Excellence

To remain competitive we cannot afford anything less than the highest level of customer service. This seminar teaches the techniques for achieving total customer satisfaction. Participants are provided the skills to create effective customer relations while learning to identify and handle customer needs.

Course Length: 1 day

You Will Learn How To:

- Identify your complete customer base including the “Hidden Customer”
- Recognize and explore your customer’s motivation
- Evaluate your communication style and customer service skills
- Respond and learn from customer complaints
- Resolve customer problems and keep your customers coming back

Stress Management

The pace of the modern business world often leads to an increased level of stress. This seminar teaches the highly complex concept of stress. Attendees gain an understanding of stress from a physiological and psychological perspective. The role of relaxation, exercise, and diet in stress management is explained. Common coping skills which help people manage stress are discussed in detail.

Course Length: 1 day

You Will Learn How To:

- Assess your personal defense mechanisms for handling stress
- Identify the early warning signs of too much stress
- Stay “in-control” and “pro-active” in stressful situations
- Identify proven techniques and strategies for reducing stress
- Develop a personal stress reduction plan that will improve your performance, health, and personal relationships

Successful Delegation

This program defines the elements of effective delegation. Learn how to identify and resolve common barriers to distributing and managing work projects. Specific suggestions are given as participants apply the materials and tools to relevant situations in their everyday work setting. Various delegation-planning instruments are used to help participants plan, track, and follow-up on delegated activities.

Course Length: 1 day

You Will Learn How To:

- Explore why many employees avoid delegation
- Distinguish the difference between “dumping” and “delegating” projects
- Identify the common barriers to successful delegation
- Identify the seven key components of successful delegation
- Apply the Delegation Planning Worksheet to your specific project challenges

Team Building Programs

The modern business environment demands that individuals work in teams to meet the customers needs. However, business teams differ in their structure and goals. Thus, we offer three distinct team building programs. Each has been developed with a specific audience and goal in mind.

Work Unit Team Building is designed for groups of employees from the same work unit or department. It teaches principles and practices for developing successful problem-solving teams. Case studies, inventories, and group exercises are used to reinforce each of the team building skills presented.

Course Length: 1.5 days

You Will Learn How To:

- Identify the appropriate goals, roles, procedures, and relationships for your work team
- Confront and deal with dysfunctional team behaviors
- Develop and share the leadership responsibilities for your team
- Specify, adapt, and develop appropriate team processing skills
- Explore the various alternatives available for team-based procedures

Inter-Functional Team Building is designed for those teams comprised of members from different work units. These teams are typically formed to service the many needs of a specific client base, a geographic territory, etc. This type of team presents new challenges, as there are no clear authority foundations to turn to within the structure. Inter-functional behaviors, rivalries, procedures, and personalities are discussed as they relate to the proper functioning of this type of work team. Experiential exercises based on the real business world accentuate the need for these teams to work effectively together.

Course Length: 2 days

You Will Learn How To:

- Identify the key role that teams play in organizational change
- Move from a traditional to a high performance organization
- Apply the “10 Characteristics of Effective Teams”
- Develop synergy with your team members
- Evaluate the skill contribution that each team member brings to the organization

The Team Value Foundation is a program designed for the key managers of a business unit. In order for teams to operate properly and productively, they must have the proper foundation of values for support. This program helps the key managers develop the values that are needed to support the organization’s team strategy. Discover how to transfer these values into day-to-day actions.

Course Length: 1 day

You Will Learn How To:

- Develop “10” key values that will support the team concept
- Communicate and continually support these values
- Identify and practice behaviors that will reflect these values
- Align these values and behaviors to the business challenges confronting your teams
- Continually provide the appropriate leadership to insure team effectiveness

The Resume... Market Your Experience

The best resumes and job search correspondences are written after carefully determining a specific focus and direction. This workshop provides a structure with which the client can begin the process of translating their experience and future goals into concise, focused, and inviting written communications. Upon completion of this workshop, all attendees may have their resume critiqued by the facilitator.

Course Length: 1 day

You Will Learn How To:

- Develop an effective resume
- Write a cover, target, and thank you letter
- Use electronic methods to send resumes and other job search correspondences
- Format your resume and all job search correspondences to insure they get noticed
- Use personal references in the most appropriate and high-impact manner

Time Management

This program teaches practical ways to simplify and speed up paperwork; organize for efficiency; deal with interruptions; and effectively overcome procrastination. Ideas discussed relate to both business and personal organization. Attendees gain an appreciation of the benefits and rewards of being better organized, and a realization of the cost of disorganization.

Course Length: 1 day

You Will Learn How To:

- Identify your strengths and development needs as they relate to time usage
- Manage your time more effectively by focusing on high-priority activities.
- Develop techniques to eliminate or control your “time wasters”
- Effectively involve others in supporting your time management behaviors
- Maintain a healthy balance between your personal and professional goals

Tomorrow’s Supervisor

The first step up the management ladder may be the most challenging. Prior to the promotion, the employee was a doer, a technical specialist. With the stroke of a pen, the new supervisor is expected to make a fundamental shift in how they get things done. This comprehensive program analyzes these new expectations by discussing the subjects of motivation, interpersonal communication, credibility, written communications, team building, and various expectancy theories.

Course Length: 2 days

You Will Learn How To:

- Establish positive interpersonal relationships with your workforce
- Use traditional management theory to develop a unique management style
- Develop team motivation skills by exploring leadership characteristics
- Use the power of expectations to lead the work group effectively
- Build a more cohesive team by utilizing the concept of interdependence

Training the Trainer Programs

Equis Consulting offers a great deal of flexibility in the field of training and facilitation instruction. In addition to our Facilitating Progress program that is described on page 10, we offer a modularized Training the Trainer program that can be scheduled to focus on the specific needs of your training professionals. Each module of the program can be scheduled separately, or it can be set-up as a weeklong training school. You make the choice.

These programs are designed for trainers who are responsible for one-on-one, and small to large group training. Innovative “adult” training methods and “accelerated learning” are featured in all modules of this program. Participants will explore “the adult learner” from various perspectives, analyze the impact this may have on the learning, and select the most appropriate training methodologies.

Module One: Build! Constructing the Foundation – Assessment & Design

This module is designed to give the trainer a basic foundation in the assessment, design, development, implementation, and evaluation steps in the training and development world. Primary focus in this module is placed on assessment and design while exploring trainer qualities, competencies, tasks, and functions. Needs analysis, training and learning styles, and writing performance objectives are also featured in this module.

Course Length: 1 day

You Will Learn How To:

- Identify and describe the five elements of the ADDIE model for instructional systems development
- Identify and describe at least four characteristics of adult learners and how this affects the development of training
- Identify and describe at least four different adult learning styles
- Identify and describe your own learning and training style
- Identify and describe all three critical elements of a performance objective

Module Two: Build! Constructing the Foundation – Development & Implementation

The focus of this module is accelerated learning and how to apply its principles to the development and implementation of your instructional programs. Accelerated learning is always learner focused and creates the ideal “context” for learners to discover. Facilitation, presentation, and training skills presented in this module accentuate a more learner-centered approach rather than an information-centered approach. Active training, giving and receiving feedback, and creative approaches to presentation are modeled by both the instructors and the participants. Skill practices allow for more effective transfer of the skills taught.

Course Length: 1 day

You Will Learn How To:

- Define “accelerated/active learning” accurately and apply it appropriately
- Identify and describe two active learning activities
- Explain at least four differences between “presenting” and “facilitating”
- Identify and describe all three elements for facilitating an activity
- Apply and demonstrate the three elements for facilitating an activity to the quality level as set by the course instructor

Module Three: Constructing the Foundation – Advanced Implementation & Evaluation

The focus of this module is to spotlight advanced platforms for delivering instructional materials. On-the-job training and computer-based training can be made more active and interesting by use of “accelerated learning” methodologies. In addition to the exploration of these delivery methods, this module discusses the most overlooked and misunderstood piece of the instructional development process – evaluation. Various methods of evaluation are explored and participants will get an opportunity to develop an evaluation instrument to be used in one of their programs.

Course Length: 1 day

You Will Learn How To:

- Identify and describe at least five ways to make computer-based training more active
- Write at least five questions you have about on-the-job training and discover at least one possible solution for each question.
- Identify and describe all four levels of evaluation
- Write a evaluation tool to be used in your next training session
- Apply the information obtained from the evaluation step to the assessment and design steps of the instructional development process

Module Four: Train! Communication Skills

This session explores the world of communication as it applies to training. Clear communication is critical to the success of a skilled trainer or facilitator. Probably the most challenging of all facilitation and training skills is processing activities in the classroom. Trainers need to make “textbook” ideas into working “realities”. This module focuses on turning communication theory into classroom reality by discussing applicable skills such as charting, group discovery techniques, questioning skills, and listening for understanding. The trainer as a coach, counselor, and mentor are also explored in addition to techniques for encouraging participation and handling difficult behaviors.

Course Length: 1 day

You Will Learn How To:

- Demonstrate effective flip charting techniques to the skill level as determined by the course instructor
- Restate at least five questions that will stimulate discussion
- Define coaching, mentoring, and counseling accurately
- Identify at least three techniques for listening for understanding
- Demonstrate the skills needed to handle difficult behaviors to the skill level as determined by the course instructor

Module Five: Train! Facilitation Skills

This module is primarily an application module. It’s design centers around videotaped skill practices demonstrating specific facilitation techniques using training materials and subjects familiar to the participant. Feedback from a master trainer and other program participants will be used to develop the training and facilitation skills of the participants. Ideas and concepts for reinforcement and improvement will be tailored specifically to the needs of each participant. Participants will also get the opportunity to evaluate their own performance by viewing their own videotape prior to the afternoon session. Various creative problem-solving techniques are also introduced in this session to assist the participants with their facilitation duties as a trainer.

Course Length: 1 day

You Will Learn How To:

- Demonstrate effective facilitation techniques to the skill level as determined by the course instructor
- Identify and describe the six step approach to exploring and solving problems
- Demonstrate the six step approach technique in solving a specific problem encountered by the majority of trainers
- Develop a personal action plan for improving your facilitation skills based on input received through the videotaped skill practices, feedback from the instructor, and input from the other participants

Transitions

This workshop lays the foundation for employees impacted by downsizing or reorganization. Successful candidates are able to navigate the emotional response to job loss as well as the work necessary to create a job-search strategy and marketing plan. Workshop attendees will receive support, direction and techniques to help get them back on course toward a new and fulfilling position. Upon completion of this workshop, all attendees will receive a one-hour individual career coaching session to support their transition. These career coaching sessions may be scheduled for a later date.

Course Length: 1 day

You Will Learn How To:

- Manage change
- Manage your emotional reaction to job loss
- Manage the "transition" process
- Market yourself for future opportunities

Understanding Personality Styles*

Explore your own personality style and those of others. See how your preferences for taking in information and making decisions affect your interactions at work and home. Each participant will complete the Myers-Briggs Type Indicator. Using these results, participants will learn more about their own personality preferences for getting energy, taking in information, making decisions, and organizing their world. The primary focus of this program is to improve interpersonal relationships by understanding the personality preferences of those involved.

Course Length: 1 day

You Will Learn How To:

- Use the Myers-Briggs Type Indicator to identify your personality preferences
- Identify communication styles that are compatible with different personality styles
- Use motivational methods that work effectively with the identified personalities
- Recognize visual, vocal, and verbal cues to indicate a specific personality style
- Develop strategies for enhancing your relationships with all styles

*This program can be customized for teams. Explore how individual personality preferences are affecting your team's ability to function effectively. Gain insight into how your team handles conflict, solves problems, and interacts with customers. Identify your team's personality type and how others may perceive your team.

Verbal Interaction Techniques

Discussion in this program begins with identifying interpersonal communication barriers. The influence of role posturing, voice and vocal qualities, humor, and physical body language are demonstrated by using various analytical tools. Techniques for improving communications such as active listening and non-verbal communication are discussed.

Course Length: 1 day

You Will Learn How To:

- Understand strategies for communication and how they affect the achievement of personal and business goals
- Understand the basic values and behaviors associated with effective listening
- Incorporate specific interaction techniques to achieve higher levels of understanding
- Obtain and convey feedback in a manner that is non-threatening and productive
- Develop interaction skills that enable you to achieve more positive relationships with others