



Knowledge Source Inc.

Course Catalog

Project Management • Leadership & Professional Development • IT & Data Analytics

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About Knowledge Source Inc.

Empowering professionals for over 32 years through innovative, hands-on learning.

For over 32 years, Knowledge Source Inc. (KSI) has provided high-impact professional development training to organizations across the United States and internationally. Our programs are designed to help professionals excel in their fields through practical, hands-on learning and real-world application.

We specialize in delivering CPE-accredited courses and workshops across three major disciplines:

- **Project Management** – including PMP® and PMI-RMP® Certification Prep, Risk Management, and Leadership for PMOs
- **IT & Data Analytics** – covering Microsoft Excel, Power BI, SQL, AI for CPAs, and Data Visualization
- **Leadership & Professional Development** – focused on emotional intelligence, communication, and strategic leadership

Whether delivered on-site or through Group Internet Live sessions, every KSI program emphasizes engagement, relevance, and measurable outcomes. Our team of industry-experienced instructors ensures that each session provides both immediate skill application and long-term professional growth.

Customized Training Solutions:

We work directly with corporate learning teams, PMOs, and professional associations to design tailored learning paths that meet your specific organizational goals.

Contact Us:

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Project Management Certification & Training

Prepare your team for success with expert-led project management training from Knowledge Source Inc. We offer virtual and on-site courses designed to help professionals master the skills needed to lead projects effectively and earn valuable certifications. Our offerings include comprehensive prep courses for both the Project Management Professional (PMP®) and PMI Risk Management Professional (PMI-RMP®) certifications.

With over 30 years of experience, we provide engaging, real-world instruction tailored to your industry and organizational goals.

Certifications. Practical tools. Real results.

Let us help your team build confidence, reduce project risk, and deliver success.

The Path to PMP® Certification Free Webinar

Duration: 1 hour | Delivery Format: Group Live (On-site or Virtual)

Webinar Overview

Take your project management skills to the next level with the PMP certification, a gold standard recognized for its emphasis on competent leadership and team direction. This credential not only solidifies your existing skills but also makes you a preferred choice for employers, providing a boost to your earnings. To guide you on this journey, we offer our 'Path to PMP® Certification' webinar. It provides prospective PMP® candidates with essential information such as exam requirements, application tips, useful prep course resources, and a chance to clarify any doubts with the instructor. Don't miss this opportunity to enhance your project management expertise!

Webinar Objectives

By the end of this webinar, participants will be able to:

- **Identify key benefits of PMI membership**, including discounted exam fees, access to the PMBOK® Guide, study resources, and networking opportunities.
- **Understand the PMP® application process**, including how to navigate the PMI Exam Handbook, meet eligibility requirements, and track project management experience.
- **Review educational and training prerequisites** and learn how to ensure you meet the required formal training hours and work experience before applying.
- **Recognize PMI exam policies and fee structures**, including application costs, rescheduling rules, and refund policies.
- **Learn the application review timeline**, from submission to scheduling your exam after approval.
- **Understand the PMP® exam structure**, question formats, and scoring methodology to know what to expect on exam day.
- **Develop an effective study plan**, including resource selection, time management, learning logs, and exam prep strategies.

- **Gain tips for success**, such as leveraging study groups, practice exams, and understanding PMI's Code of Ethics and Professional Conduct.

Project Management Professional (PMP®) Certification Prep Course

Duration: 35 Hours | Delivery Format: Group Live (On-site or Virtual)

Course Overview

The PMI's Project Management Professional (PMP)® credential stands as a crucial industry-recognized certification for project managers worldwide. Holding the PMP® signifies your proven competence, experience, and education in leading and directing projects. The value of this certification is reflected in enhanced attractiveness to employers and higher potential earnings. As depicted in the PMI Project Management Salary Survey–Eighth Edition, certification indeed positively influences project manager salaries.

Project Management Professional (PMP®) Exam Prep Course Includes Two Sets of Materials with over 1,700 question exam simulators, certified instructors and unlimited support during and after the class!

Text 1: The PMP® Exam Success Series: Bootcamp Manual which compliments the PMBOK® Guide – Sixth Edition – complete with a 700-question exam simulation application.

(Updated for the January 2, 2021, PMP® Exam) The Crosswind Success Series: PMP® Exam Bootcamp Manual with Exam Simulation Application (V6.1) provides a foundation for the Project Management Professional (PMP)® Exam product line. This manual comes complete with a 200 question ONLINE exam simulation application and 50/100 question ITTO (inputs, tools & techniques, outputs) exams created with over 1,400 ITTO questions in the database.

- Covers **PEOPLE, PROCESSES, BUSINESS ENVIRONMENT and AGILE/HYBRID**.
- Covers all knowledge areas as well as the five process groups.
- Contains 530 exam format sample questions (330 questions in the printed book, 200 questions online in the exam sim app).
- **Includes over 60+ videos** for every process, knowledge area, process group, earned value, and forward backward pass.
- Includes online content to enhance study as well as exam application tools.
- Presents clear, identifiable formulas with memorization keys.
- Includes 2 color, double sided quick reference guides
- Offers online access to one of the most up-to-date learning materials available.

Additional Exam Simulator: PMP Exam Prep: Questions, Answers, & Explanations (120-day access)

- 1000+ Practice Questions with Detailed Solutions.
- 8 condensed mock exams that can be completed in one hour.
- 8 targeted tests on the PMBOK® Guide – Seventh Edition Knowledge Areas and Code of Ethics.
- Covers all knowledge areas as well as the five process groups.
- Clear explanations and wording
- PMBOK® Guide – Seventh Edition page references
- Reasoning based on the PMBOK® Guide – Seventh Edition

Course Objectives

Understand the PMP Exam Structure and Requirements

- Navigate the PMP exam domains, question formats, and application process.

- Align preparation with the PMI Talent Triangle: People, Process, and Business Environment.

Demonstrate Knowledge of the Project Management Environment

- Distinguish between projects, programs, and operations within various organizational structures.
- Recognize the influence of governance, external factors, and the business environment on project success.

Apply Leadership and Team Management Principles

- Identify effective leadership styles and techniques for building and leading high-performing teams.
- Resolve conflict, manage team dynamics, and support virtual or diverse teams.

Communicate Effectively with Stakeholders

- Use communication models, channels, and strategies to ensure project transparency and stakeholder engagement.
- Analyze stakeholder influence and apply engagement techniques to manage expectations.

Implement Agile, Hybrid, and Predictive Approaches

- Understand and apply Agile principles, Scrum, Kanban, and Lean practices.
- Determine when and how to use hybrid methodologies in project execution.

Manage Project Integration Across the Lifecycle

- Develop a project charter and project management plan.
- Monitor, control, and close projects or project phases effectively.
- Capture and leverage project knowledge for continuous improvement.

Plan and Control Project Scope, Schedule, and Costs

- Define project scope and decompose it using a Work Breakdown Structure (WBS).
- Create and maintain realistic project schedules using CPM and scheduling tools.
- Apply budgeting techniques and Earned Value Management (EVM) to track and forecast project performance.

Deliver Quality and Manage Risk Proactively

- Implement quality assurance and control practices using Lean and Six Sigma concepts.
- Identify, analyze, and respond to risks using proven risk management strategies.

Manage Procurement and Vendor Relationships

- Plan procurements, evaluate contracting options, and manage vendor performance.
- Address legal, ethical, and compliance considerations in procurement processes.

PMP® Exam Prep: Mastering Situational Exam Questions

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

The PMP® Certification Exam is more than a knowledge test—it's a psychometric challenge designed to assess your ability to apply project management principles in real-world scenarios. You'll face complex questions that mimic project environments, requiring quick thinking, critical analysis, and strategic decision-making under time pressure.

This course is specifically designed to prepare you for that experience, going beyond the basics of the Project Management Body of Knowledge (PMBOK® Guide). You'll gain the tools and strategies needed to navigate situational questions effectively, helping you recognize what's truly being asked and how to respond with confidence. By the end of this training, you'll not only understand the material but also develop the practical skills needed to excel in a high-pressure exam setting. Get ready to boost your confidence and walk into the PMP® Exam fully prepared.

Course Objectives

- Stress Management Techniques – Stay calm, focused, and in control during the exam.
- Time Management Skills – Learn how to pace yourself and maximize every minute.
- Decoding Questions – Quickly identify what's being asked and the best approach to answer.
- Context Recognition – Understand the project environment behind each question.
- Tackling “Not” and “Except” Questions – Master strategies for handling tricky wording.
- Process Groups in Action – Apply Table 1.4: Process Groups to place questions in the right context.
- Essential Thumb Rules – Quick-reference tips for answering PMP® Exam questions effectively.

Project Management Fundamentals and Best Practices Applied

Duration: 3-4 Days Customized | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Project Management Fundamentals and Best Practices Applied, we will walk you through the nuts and bolts of project management, from setting priorities to controlling expenses and reporting on the results. After completing this course, participants will find their projects are coming in faster, cheaper, AND on time and on budget!

Course Objectives

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

Path to the Risk Management Professional (PMI-RMP®) Free Webinar

Duration: 1 hour | Delivery Format: Group Live Virtual

Webinar Overview

The Risk Management Professional (PMI-RMP®) Certification, offered by the Project Management Institute (PMI), is highly desirable for several reasons. It demonstrates expertise in identifying, assessing, and mitigating risks, which is critical for project success. Join us for this free webinar to review the journey to obtaining the PMI-RMP credential. Learn the requirements to sit for the exam, how the exam is administered, how to study for the exam, how to know you are ready to take the exam, and lots more!

Below are just a few reasons a project manager may want to earn this highly desirable credential:

- Demand for Risk Management Expertise
- Specialized Knowledge and Skills
- Improved Career Opportunities
- Global Recognition
- Enhanced Project Success
- Professional Growth
- Higher Earning Potential
- Alignment with Organizational Goals
- Complement to Other Certifications

Risk Management Professional (PMI-RMP®) Certification Prep Course

Duration: 30 Hours | Delivery Format: Group Live (On-site or Virtual)

Course Overview

The Risk Management Professional (PMI-RMP®) Certification is the premier certification for project managers with a risk orientation or risk managers working extensively on projects. The certification serves to show a clear grasp of risk management practice in a project management context. As organizations seek to mature in project management, risk management becomes a logical next step in ensuring that projects are completed without putting individuals and organizations in danger. Risk management's positive orientation opportunity is also a focus for true professionals seeking to optimize individual and organizational performance and outcomes.

Course Materials Included:

A printed slide deck to take notes in the class, plus after the class, you'll receive one full year of access to our guided online learning platform—complete with all course materials, practice exam questions, quizzes, flashcards, and more.

The best part? We've integrated an AI-powered tutor to help you prepare at your peak for exam day. This smart tool can guide your study plan, explain tricky concepts, and give you personalized practice—making your learning more efficient and effective.

Here's a look at what it can do for you (We are genuinely excited about some of these AI features—they're a real game-changer!):

Interactive Q&A

Students can ask natural-language questions about the course content.

AI provides immediate, context-relevant explanations.

Works like a chat-based tutor embedded in the lesson.

Concept Clarification

Breaks down difficult terms and processes into simpler explanations.

Can give real-world examples to make abstract concepts easier to grasp.

Guided Practice

Can help solve practice questions step-by-step instead of just showing the correct answer.

Offers hints before revealing solutions.

Personalized Learning Support

Identifies weak areas from a learner's performance data.

Suggests targeted study material, quizzes, and labs to improve those areas.

On-Demand Summaries

Can summarize long lessons, labs, or chapters into concise points for quick revision.

Exam Prep Assistance

Generates custom practice tests based on topics the learner needs most help with.

Can explain why an answer is correct or incorrect.

Use it as a 24/7 homework helper for instant explanations.

Prepare for exams without waiting for instructor feedback.

Get confidence before attempting graded assessments.

The PMI-RMP is particularly suited to:

- Project Managers
- Risk Managers
- Functional Managers
- C-Suite Executives

The PMI-RMP® exam now includes agile and hybrid environments, as well as enterprise-level risks all project managers need to consider.

Unlike the PMP® Certification Prep course which is primarily designed to help candidates pass the PMP® exam, this class is for those who want a comprehensive course covering all aspects of Risk Management. Participants are not required to register for the exam to attend this course. With your advanced skills in risk management, you perform a specialized function attuned to the needs of a project environment that is increasingly global, virtual and complex. The PMI Risk Management Professional (PMI-RMP)® highlights your ability to identify and assess project risks, mitigate threats and capitalize on opportunities. Gain and Maintain Your PMI-RMP:

- The certification exam has 115 multiple-choice questions, and you have 2.5 hours to complete it.
- To maintain your PMI-RMP, you must earn 30 professional development units (PDUs) in risk management topics every three years.

Prerequisites to Sit for the Exam:

- Secondary degree (high school diploma, associate's degree, or the global equivalent).
- At least 36 months spent in the specialized area of professional project risk management within the last five consecutive years
- 40 hours of project risk management education.

OR

- Four-year degree (bachelor's degree or the global equivalent)
- 24 months of project risk management experience within the last 5 years
- 30 hours of project risk management education

Course Objectives

Familiarity with project management concepts and working experience with project management are required. Those who have earned the PMP® credential are at a specific advantage for earning their PMI-RMP®; however, being a PMP® is not a prerequisite for attending. Working knowledge of office productivity tools is desirable but not essential. Experience with a specific project management software tool is not required. Target Student: This course will benefit anyone interested in learning the fundamentals of managing risk and will focus on those preparing for PMI's® certification exam and obtaining the PMI-RMP® credential. The final day will end with a full-length practice exam and question review.

Exam Description & Objectives

PMI-RMP Exam Blueprint (From the Examination Content Outline)

Domain	Percentage of Questions
Domain 1—Risk Strategy and Planning (6 tasks)	22%
Domain 2—Risk Identification (4 tasks)	23%
Domain 3—Risk Analysis (3 tasks)	23%
Domain 4—Risk Response (2 tasks)	13%
Domain 5—Monitor and Control Risk (4 tasks)	19%
Total	100%

Risk Management Essentials for the Project Manager

Duration: 3 Days/Customized | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Navigating the realm of risk management takes more than superior strategies, it requires collective involvement! Incorporating risk management within your project workflows and advocating for transparent dialogue ensures all members contribute. Augment involvement and watch your project risks diminish! This course anticipates your understanding of project management principles and hands-on experience in project methodologies or a PMP® Certification. As a prerequisite, attendees should have either completed Project Management Fundamentals and Best Practices or possess equivalent expertise.

This course is designed for managers of project managers, project managers, project team members and risk team members who want to master the essential elements of effective risk management. Project teams who are about to begin risk management planning on a small to medium sized project and want to get a fast start on Risk planning and management.

Course Objectives

- Recognize the importance of risk management in successful projects.
- Understand the critical success factors for effective risk management.
- Learn to identify positive (Opportunities) as well as negative (Threats) risks.
- Discover the root cause of risks by identifying the “Drivers” associated with the risk probability and consequences.
- Gain hands on experience using Quantitative Analysis tools such as Decision Tree and Monte Carlo Analysis.
- Developing SMART Risk Response Actions
- Learn practical methods for tracking and trending your project risks.

Leadership Development

Championing Change

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Leaders will be introduced to tips and tools to increase their effectiveness as leaders in the context of workplace change. This session is designed for those in managerial roles to build understanding of the key elements of the change process so that they can actively assist their direct reports to navigate through the continuous shifts in the workplace environment. This is an interactive session that utilizes lecturettes, small and large group activities to increase knowledge, practice techniques, and reinforce concepts.

Course Objectives

- Understand the key elements and stages of the organizational change process
- Recognize the leader’s role and responsibilities in facilitating successful change initiatives
- Identify common reactions to change and strategies to support employees through transitions
- Apply practical tips and tools to communicate change effectively and build trust within teams

- Develop techniques to maintain engagement and productivity during periods of uncertainty
- Practice leadership behaviors that model adaptability, resilience, and a positive mindset toward change

The Foundation of Leadership

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Leadership is not a position; it is a responsibility. All too often, employees are promoted into leadership based on their technical skills, not because they possess the knowledge, competencies and experience that are vital to leadership success. The consequences are often detrimental to an organization's bottom line - decreased engagement, retention, productivity, and profitability.

In this highly interactive and engaging session, participants will gain the knowledge and ability to serve as a catalyst of success. They will have a clearer understanding of the foundation of leadership, as well as a deeper appreciation for the responsibility that is paramount to leading others. They will recognize the difference between leadership and management and why both are necessary, understand the competencies necessary for leadership effectiveness, be able to select the appropriate leadership style for a variety of situations and create a personal leadership identity and action plan to use moving forward.

Course Objectives

- To recognize the importance of developing leadership competencies and mindset.
- To understand the difference between management and leadership.
- To become aware of the top characteristics and traits desired by employees in their leaders.
- To understand the difference between fixed mindset vs. growth mindset and how it impacts leadership.
- To become aware of the obstacles to leadership effectiveness and the impact each has on success.
- To recognize the different facets of leadership responsibility.
- To understand the different styles of leadership and the guidelines for utilizing them.
- To create a personal leadership identity and action plan for future success.

The Emotionally Intelligent Leader: Cultivating a Culture of Trust, Collaboration and Accountability

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

A leader's emotions are contagious in an organization; as a result, he/she can persuade, motivate, and inspire others to create a positive, energized and collaborative working environment. An emotionally intelligent leader is in tune with him or herself and the people they work with, creating a high level of significance in the workplace that leads to increased productivity and job satisfaction.

This highly engaged workshop is comprised of experimental learning, proven techniques, and application exercises that take leadership development beyond the bounds of theory and into "real time" interaction and training. Participants are introduced to new concepts and tools and then spend a majority of their time experientially applying the learning, practicing the new skills, and trying new behaviors, all with the support and coaching of a highly experienced facilitator.

Course Objectives

- To gain an awareness of Emotional Intelligence and its four domains.
- To understand the benefits of being an emotionally intelligent leader and the obstacles one faces in doing so.
- To understand leadership styles and behaviors and how emotional intelligence enhances, or deters from, our ability to demonstrate them.
- To increase emotional self-awareness and uncover the triggers that affect our ability to lead and motivate others.
- To determine personal core values and create a personal mission statement that reflects authentic leadership.
- To develop strategies to control emotions, manage pressure, and model the behaviors we want to elicit from others.
- To demonstrate the ability to empathize with, engage, and build a rapport with others.
- To develop an emotional intelligence communication toolbox.
- To appreciate the benefit and necessity of giving and receiving feedback.
- To understand how to establish trust and to encourage collaborative, rather than competitive, environments.
- To discover the power of accountability by increasing buy-in for organizational initiatives.
- To learn practical skills to productively engage in and lead others to resolve conflicts.
- To understand human needs and how to satisfy them as an emotionally intelligent leader.

From Contributor to Leader: Mastering the Shift to Management

Duration: ½ Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Transitioning from being an individual contributor to a leader requires a shift in how work gets done and how new leaders engage with their direct reports, peers, and managers. Moving from doing to delegating is one of the most significant and challenging adjustments for emerging leaders. In this experiential session, participants will explore the key differences between individual and leadership roles and gain practical tips, tools, and techniques for increasing productivity – both for themselves and for those they lead. This workshop can stand alone or be integrated into a broader Management Learning Journey Series.

Course Objectives

- Examine the transition from individual contributor to leader and the shifts in mindset and responsibility it requires
- Identify key strategies and techniques for increasing personal and team productivity
- Discuss the principles of situational leadership and understand why effective leadership requires adaptability
- Complete a self-assessment to gain insight into their personal leadership style and development areas
- Develop a practical action plan for applying new leadership skills immediately in the workplace

Leadership Through Accountability: Navigating Difficult Conversations with Confidence

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

As a leader, the ability to hold people accountable is vital to your personal success as well as that of your team and the organization. The process begins with you. On the front end, communicating expectations clearly sets the path for adherence and positive results. But what happens when broken promises, bad behavior and unmet expectations still show up, despite your best effort? Unfortunately, often leaders are challenged by addressing the issues at hand, leading to an inability to bring your vision to reality, a decrease in your personal credibility, and the potential for negativity to spread quickly and vigorously.

Often people don't make change unless they are motivated to do so. With the ability to hold others accountable, while motivating them to make positive changes, your leadership effectiveness soars. In this session, participants will identify what's keeping them stuck – why they're not holding people accountable. After reframing the stories around their reasons, attendees will learn how to plan for the conversations they're not having, how to initiate the dialogue, how to move the discussion forward and then how to end the interaction on a positive and proactive note. At the conclusion, they will be armed with the knowledge and ability to transform their leadership presence as well as empower others to realize their own potential.

Course Objectives

- To understand the foundation of accountability conversations.
- To assess personal competency and identify barriers in holding others accountable.
- To be able to recognize the signs of when an accountability conversation is necessary.
- To understand the concept of dialogue and adding to the shared pool of meaning.
- To learn the steps to planning for an accountability conversation.
- To identify one's style under stress, determine how it impacts interactions and develop strategies for more approaches that lead to positive outcomes.
- To recognize and master one's stories that lead to assumptions and judgments.
- To gain the ability to initiate an accountability conversation and recognize signs that safety is at risk.
- To recognize the gap between what is expected and what occurs and then communicate it to others.
- To understand the various ability barriers that keep others from doing what is agreed upon/expected.
- To learn how to motivate others to make needed changes.
- To gain the ability to effectively wrap up an accountability conversation and create a plan for future actions.

The Leadership Mindset: Shaping Beliefs, Behaviors and Breakthrough Performance

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

What we think and believe shapes how we lead. The quality and accuracy of a leader's thoughts directly influence decisions, behaviors, and the ability to inspire and engage others. A leader's mindset not only defines how challenges are viewed but also determines whether mistakes are seen as failures or as opportunities for learning and growth.

In this highly interactive session, participants will explore how mindset drives performance, relationships, and organizational outcomes. Through guided discussions and hands-on activities, they will examine belief systems, uncover limiting assumptions, and adopt new ways of thinking that promote agility, curiosity, and innovation. Leaders will leave equipped with strategies to strengthen their personal mindset and inspire growth in those they lead.

Course Objectives

- Explain how mindset influences leadership behaviors, decision-making, and team performance.
- Differentiate between fixed and growth mindsets and describe how each impacts adaptability and success.
- Recognize limiting beliefs and assumptions that inhibit personal and professional growth.
- Apply strategies to shift from self-limiting patterns to a mindset that embraces learning, feedback, and new perspectives.
- Practice techniques to foster a culture of curiosity, resilience, and continuous improvement within teams.
- Develop an action plan to reinforce a growth mindset and sustain leadership development beyond the session.

Strengths-based Leadership: Leveraging Personal Strengths to Produce Powerful Results

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Research has proven that the best way to develop people is to identify the ways in which they most naturally think, feel, and behave and then build upon these elements to create strength, or the ability to provide consistent, strong performance in specific tasks and large-scale projects. The Clifton StrengthsFinder assessment serves as the foundation of any strengths-based culture, providing insight about how people can develop their talents into strengths, information managers need to understand, engage, and build upon their employees' greatest talents, and knowledge leaders can use to create onboarding and development programs that speak directly to their employees' most natural ways of thinking and behaving.

At the conclusion of this workshop, participants will gain knowledge and practical tools that can be immediately applied to their individual work situations, as well as a vision of the powerful productivity possible in a team that recognizes and leverages all team members' strengths.

Please Note! A requirement of this course is to purchase StrengthsFinders 2.0, which includes a code to complete a Strength-based personal assessment. You will need to print out your full results report and bring it the day of the workshop as the focus of the course is to develop strategies to best utilize your Top 5 Strengths. The cost is \$25.

Course Objectives

- Provide an overview of strengths philosophy and positive psychology.
- Examine the four strength domains and the 34 themes that are categorized into each.
- Determine their KSAP's (Knowledge, Skills, Abilities, and Personal Characteristics) and how they contribute to the process of identifying strengths.
- Distinguish the difference between talents and skills and understand the formula for taking advantage of natural talents and turning them into strengths.
- Determine how to compensate for limitations and fill in necessary gaps.

- Examine the characteristics of a productive, high-producing team.
- Determine how to use individual strengths to develop a functional and successful team.
- Understand the differences between engaged, disengaged, and highly disengaged employees and the cultures that produce each.
- Learn strategies to develop a culture of highly engaged employees.
- Examine the concept of strength-based leadership and learn how to serve as a catalyst of excellence and inspire others to perform at their optimum.
- Build a Strengths-Based Individual Development Plan.

Professional Development

The Art of Delegation: Using the Power of People to Increase Productivity

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

As organizations and teams become more complex, roles and responsibilities are often less defined and there are numerous areas of potential difficulty, confusion and conflict. As a result, the need for effective delegation is more important than ever.

Despite an understanding and appreciation of the value of the process, many are challenged by a variety of obstacles when attempting to initiate and manage delegating tasks and projects.

At the completion of the workshop, participants will gain the ability to achieve more, empower others, and meet organizational standards and initiatives. They will also overcome existing inhibitions they have about delegation, and demonstrate the ability to follow specific steps that make assignments clear, instill a sense of accountability in others, while maintaining control over tasks and projects that are ultimately under their jurisdiction

Course Objectives

- Explain the purpose and importance of effective delegation within organizational success.
- Recognize the personal and team-wide benefits of delegating tasks and projects appropriately.
- Identify common barriers and misconceptions that make delegation challenging.
- Assess their own delegation habits, inhibitions, and areas for improvement.
- Apply a structured process for planning, assigning, and reviewing delegated work.
- Evaluate which tasks and projects are suitable for delegation and select the right individual for each assignment.
- Differentiate between the various levels of authority and responsibility in the delegation process.
- Demonstrate key communication skills that promote clarity, accountability, and trust during delegation.
- Provide constructive feedback and coach team members through post-delegation debriefing.
- Utilize a delegation matrix to map authority levels and improve delegation planning.

Becoming an Ideal Team Player

Duration: 3 Hours | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This 3-hour training focuses on an approach to addressing the dangerous group behaviors that destroy teamwork. The Ideal Player philosophy centers on individual members of a team, revealing the three indispensable virtues that are imperative for personal and team success – Humility, Hunger and Smarts (interpersonal intelligence). Attendees are introduced to a powerful framework and easy-to-use tools that are invaluable in identifying, hiring and developing ideal team players in any kind of organization. Whether you're a leader striving to create a culture of teamwork, a human resources professional looking to hire real team players or an employee wanting to make yourself an invaluable team member, the session will provide the knowledge and insight to elevate performance and overall impact.

Course Objectives

- Recognize the most common dysfunctional behaviors that undermine teamwork
- Understand the three core virtues of the Ideal Team Player: Humility, Hunger, and Smarts
- Assess personal alignment with each virtue and identify areas for growth
- Apply practical tools to strengthen teamwork, trust, and accountability
- Develop strategies to foster a team culture built on shared responsibility and respect

Coaching Others Towards Personal and Professional Victory

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Simply defined, coaching is one person guiding another through a process, leading to performance enhancement. The ability to coach others is a core competency for those helping organizations to grow, successfully navigate through change, and implement professional development initiatives for its employees. Coaching helps clarify vision, beliefs, and values, and stretch the capacity to lead and influence others at all levels and at various stages of their career.

Obtaining the knowledge and tools to effectively coach others is an invaluable asset that not only benefits the person serving as the coach, but also his/her peers, reports, mentees, and/or team members. At the conclusion of this workshop, participants will have the benefit of a powerful, integrated learning experience providing the means to have better conversations, build stronger relationships, influence and motivate others, and serve as a catalyst for better business results.

Course Objectives

- Explain the core principles and benefits of coaching in the workplace.
- Recognize the importance of self-awareness and emotional intelligence in effective coaching.
- Differentiate coaching from mentoring, counseling, and consulting.
- Identify the key components of a successful coaching relationship, including trust, confidentiality, and accountability.
- Describe the essential competencies of effective coaches, such as integrity, honesty, empathy, nonjudgment, and openness.
- Determine when and how coaching is the most appropriate and effective developmental approach.
- Apply structured rituals and techniques to begin, manage, and conclude a coaching session.

- Outline the coaching process, including common strategies and approaches.
- Identify common challenges and obstacles faced by coaches and apply methods to overcome them.
- Demonstrate effective communication, questioning, and listening skills for successful coaching interactions.
- Conduct a practical coaching session with a peer or team member.
- Develop a personal coaching plan for use as a peer, supervisor, or mentor within the workplace.

Creating a Communication Toolbox for Success

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

How we are perceived and the level of success we achieve in our interactions with others, verbally, nonverbally, and in writing, is within our control. If our goal is to be seen as credible, competent, and valuable to our clients and organization, it is vital to create a Communication Toolbox, filled with the skills and abilities necessary to project a powerful and professional presence.

In this highly interactive workshop, participants will be educated about the components necessary to make a powerful and enduring impact in all facets of their lives. Additionally, they will participate in thought-provoking discussion and engage in individual and group activities that will allow them an opportunity to apply theory into practice. At the conclusion, those in attendance will leave with a toolbox filled with relevant and applicable methods and strategies that will lead to improved interactions and relationships with others, as well as the ability to become an influential.

Course Objectives

- Assess their current communication practices and identify specific areas for improvement.
- Explain how personal communication habits influence perception and understanding.
- Recognize the factors that build or diminish personal credibility in professional interactions.
- Identify and adjust behaviors that impact their ability to influence, persuade, and lead others effectively.
- Describe the concept of emotional contagion and apply techniques to manage personal emotional triggers.
- Use strategies to respond thoughtfully, rather than react impulsively, to others' heightened emotions.
- Apply the principles of audience-centered communication to craft messages that are clear, relevant, and well-received.
- Demonstrate active listening skills by interpreting both spoken and unspoken messages.
- Explain the role of empathy in building trust and apply empathetic communication techniques in various workplace scenarios.
- Identify common barriers to effective communication and implement strategies to overcome them.
- Develop a personalized communication improvement plan to strengthen relationships and enhance professional effectiveness.

Creating a Culture of Team Excellence

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

In this highly interactive and engaging full-day session, attendees will work collaboratively to determine their shared meaning of a culture of excellence. Furthermore, everyone will be challenged to identify how he/she is "showing up" to be in alignment with that vision, how he/she wants to, and can, contribute to taking the team from good to great, and what mindset shifts need to occur at all levels to reach its greatest potential. Most

importantly, participants will complete assessments and exercises to gain self-awareness that will be shared within the team to increase understanding and appreciation of one another.

Course Objectives

- Define what a “culture of excellence” means within their organization and team context.
- Collaboratively create a shared team definition of excellence and assess the current level of alignment with it.
- Recognize how an individual mindset of excellence contributes to sustained personal and organizational success.
- Identify strategies to cultivate and sustain a mindset that drives high performance.
- Describe the principles that define high-performing teams and apply strategies to strengthen team performance.
- Explain the three virtues of an ideal team player and how each contributes to team excellence.
- Assess their own alignment with the three virtues and develop strategies to create balance among them.
- Build authentic connections by sharing personal strengths, values, and goals with peers.
- Establish team goals that leverage strengths, foster collaboration, and build accountability for achieving excellence together.

Customer Service Excellence: Building the Foundation of Organizational Success

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Exceptional customer service is paramount to a company's or organization's enduring success. A service representative's ability – or inability – to deliver unparalleled support to its customer base can have a significant impact on the establishment's customer retention, brand, and overall profitability. The goal is to create a customer service culture that is grounded in understanding and meeting customer needs and expectations, establishing and maintaining positive relationships, and presenting an image that reflects confidence, credibility, and capability. At the conclusion of Customer Service Excellence: Building the Foundation of Organizational Success, attendees will possess the knowledge, skills, and attitude to effectively and efficiently manage each facet of the customer service experience, resulting in an increase in satisfaction and loyalty.

Course Objectives

- Explain the importance and impact of exceptional customer service on organizational success.
- Identify the core principles and behaviors that define customer service excellence.
- Recognize the significance of first impressions and apply techniques to create positive customer experiences.
- Adapt communication and interaction styles to meet the needs and preferences of different customer types.
- Demonstrate empathy and apply it appropriately to build trust and resolve customer concerns.
- Apply effective communication techniques for both phone and email interactions.
- Demonstrate active listening skills by identifying both spoken and unspoken customer needs.
- Use targeted questioning to uncover customer attitudes, issues, and priorities to develop effective solutions.
- Apply strategies for managing difficult customer situations with tact, professionalism, and diplomacy.
- Create audience-centered messages that promote understanding, respect, and customer satisfaction.
- Develop a personal action plan to enhance customer service skills and foster long-term customer relationships.

Developing a Powerful Presence to Influence, Motivate and Persuade Others

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

When someone has a powerful presence, it's easily noticeable from the moment he/she enters the room. There's an aura that speaks to others – one that exudes confidence, credibility, and charisma. People aren't born this way; they develop the skills, characteristics and traits that make them “stand out” among the rest as well as enable them to motivate, persuade and influence others for ultimate success.

Contrary to popular belief, it isn't just about how tall someone is, how they dress, or how articulately they speak that makes others sit up and take notice. There are numerous other factors and contributors to having a powerful presence and in this workshop, participants will be educated on self-development, skills building, and awareness that enhances someone's presence, as well provided opportunities to develop these competencies themselves.

Course Objectives

- Explain the concept of presence and describe how it shapes others' perceptions.
- Recognize the role of personal power in enhancing professional presence and influence.
- Define credibility and confidence and apply strategies to strengthen both traits.
- Understand the link between trust and presence and implement methods to build trust with others.
- Describe how personal happiness and fulfillment contribute to one's overall presence and impact.
- Apply techniques to enhance professional presence, personal impact, and influence.
- Demonstrate the ability to connect authentically and establish rapport with colleagues and clients.
- Use effective approaches for presenting ideas persuasively and confidently.
- Practice strategies for thinking quickly and responding effectively under pressure.
- Identify personal strengths and develop plans to leverage them for continued professional growth.

Engaging Employees in Today's 8-12 Second World

Duration: 1/2 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Is Employee Engagement one of your company's top 5 priorities to ensure recruitment and retention? You're not alone in focusing on this challenge. The statistics have remained consistent for the last 3 years – fully engaged employees are on average 26% of your employee population. Yikes Houston, we have a problem! Gallup defines engaged employees as those who are involved in and enthusiastic about their work and workplace. But most employees are indifferent, sleepwalking through their workday without regard for their performance or their organization's performance. As a result, organizations are challenged to reach their goals, innovate and profit.

In this highly interactive program, participants will learn what behaviors leaders are doing to create or destroy engagement in the workplace. They will also discover practical solutions and gain insights for raising the overall level of performance in their role as leaders of the business. A variety of methods will be incorporated to accomplish the goals of the session– large group input, small group discussions and time for self-reflection.

Attendees will leave the session with an action plan of what they need to focus on to increase their success as a Leader.

Course Objectives

- Define employee engagement and understand its direct impact on recruitment, retention, and organizational success
- Recognize key behaviors and leadership practices that drive — or diminish — engagement in the workplace
- Analyze current engagement levels within their teams and identify contributing factors
- Apply proven strategies to increase motivation, enthusiasm, and commitment among employees
- Develop an individualized action plan to strengthen engagement and elevate team performance
- Commit to specific leadership behaviors that foster trust, accountability, and a culture of high performance

Escaping the Drama Triangle: Replacing Dysfunction with Empowerment

Duration: 3 Hours | Delivery Format: Group Live (On-site or Virtual)

Course Overview

The primary objective of this three-hour training is to help people identify and move out of dysfunctional patterns of conflict and interaction. This self-awareness allows individuals and teams to replace cycles of blame, resentment, and dependency with healthier, more productive, and authentic relationships. Through instruction and self-reflection, participants gain awareness of the role(s) they play when productivity is down, engagement is low, and interactions are ineffective. The result is a shift in mindset and perspective towards an empowerment dynamic that paves the way for ultimate and enduring success.

Course Objectives

- To increase self-awareness
- To understand the 3 roles within the Drama Triangle and how each impacts individual and team success
- To promote personal accountability and responsibility
- To create healthier relationships and work culture
- To empower individuals and teams

Finance and Accounting for Non-Financial Professionals

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This practical, hands-on course provides non-financial professionals with a clear understanding of how accounting and finance principles apply to everyday business decisions.

Participants will learn how financial information is recorded, reported, and analyzed—and how to use that knowledge to interpret their organization's performance and make informed operational choices.

Through real-world examples and group exercises, participants will examine key financial statements, practice ratio analysis, explore budgeting and internal controls, and gain insight into how accountants and auditors evaluate financial data. The course emphasizes translating financial concepts into actionable business understanding, empowering professionals to confidently engage in financial discussions and decision-making.

Course Objectives

- Explain the purpose and function of accounting and finance in supporting organizational success.

- Differentiate between management accounting and financial accounting and identify how each is used by internal and external stakeholders.
- Describe the components of the primary financial statements—Balance Sheet, Income Statement, Statement of Equity, and Statement of Cash Flows—and explain how they interrelate.
- Interpret key sections of the Balance Sheet to assess an organization's financial strength and stability.
- Analyze the Income Statement to evaluate profitability, operating performance, and efficiency over a given period.
- Understand the Statement of Cash Flows and identify how operating, investing, and financing activities affect cash position.
- Recognize the role and importance of financial statement footnotes in providing transparency and context.
- Distinguish among CPA assurance services—including compilations, reviews, and audits—and understand their implications for financial reliability.
- Apply ratio analysis techniques to assess liquidity, profitability, and solvency using real or sample company data.
- Discuss the purpose and process of budgeting and identify how budgets support strategic planning and internal control.
- Explain how internal controls prevent and detect fraud and evaluate examples of control breakdowns from real-world cases.
- Communicate more effectively with accounting and finance professionals by understanding fundamental terms, reports, and decision-making tools.

Presentation Skills: Communicating with Clarity, Confidence and Credibility

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Public speaking skills are critical to professional success and the ability to do so gives you a competitive edge among your peers and competitors. To be an engaging, persuasive, and effective presenter, one must overcome the universal fear of standing in front of any audience and delivering a message. They must know how to connect with their audience by grabbing their attention from the start, tailoring their message, establishing credibility, and utilizing effective communication skills from start to finish.

In this highly engaging and interactive workshop, participants will gain the skills necessary to deliver impactful presentations that influence people to action. Through application activities, skills training, and group discussion, they will learn invaluable techniques to turn every presentation into a rewarding experience.

Course Objectives

- Explain a Model of Communication and describe the purpose and function of each component.
- Conduct an effective audience analysis, identifying key factors that shape message design and delivery.
- Recognize common barriers to effective communication and apply strategies to overcome them.
- Establish and maintain credibility before, during, and after a presentation.
- Develop engaging introductions that capture attention and clearly define the presentation's purpose.
- Use clear, persuasive language and verbal techniques to strengthen message impact.
- Tailor content and tone to align with the audience's interests, needs, and perspectives.
- Demonstrate effective nonverbal communication to enhance message delivery and audience connection.
- Apply techniques to manage nervousness and project confidence and presence while speaking.

- Design and utilize visual aids and supporting materials that reinforce key points and enhance audience understanding.

Mastering Emotional Intelligence

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Emotional Intelligence (EI) is essential to success in every aspect of life — at work, in leadership, and in personal relationships. Research consistently shows that individuals who are self-aware, socially perceptive, and skilled in managing emotions outperform others in career advancement, decision-making, and interpersonal effectiveness.

In this interactive workshop, participants will explore the Emotional Intelligence model and its four key components: self-awareness, self-management, social awareness, and relationship management. They will examine how personal values influence emotional triggers, analyze the challenges of managing emotional responses, and practice strategies to increase emotional awareness and control. Participants will leave equipped with practical tools to strengthen their emotional intelligence, enhance collaboration, and improve overall performance in both professional and personal settings.

Course Objectives

- Review the concept of Emotional Intelligence and describe its four primary components.
- Explain the role of the “emotional brain” in influencing thought, behavior, and decision-making.
- Identify personal core values and recognize how they relate to emotional triggers and self-management.
- Explore emotional triggers and analyze how they shape actions and interpersonal behaviors.
- Recognize the unique challenges men and women may face in developing emotional intelligence.
- Demonstrate how emotional intelligence competencies contribute to effective leadership and relationship management.
- Apply emotionally intelligent communication techniques to build and maintain strong relationships.
- Develop strategies to enhance both personal and social dimensions of emotional intelligence.
- Create an Emotional Intelligence Action Plan outlining challenges, needed resources, measurable goals, and implementation strategies.

The Gift of Feedback: Giving and Receiving

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

What is the first thing that comes to your mind when you hear the word Feedback? Ugh? If you are like most people, it's not a positive response. As a recipient of feedback, you may feel like you must defend your actions or explain them. When you begin to think about feedback as an opportunity for growth and welcome it, you could change your perception around feedback. In this highly interactive session, participants will be introduced to “Do's and Don'ts” for effectively engaging in a feedback conversation. Through a variety of exercises and activities, the participants will build and enhance their giving and receiving feedback skills. The program will provide an opportunity to actively participate, and role play real life scenarios and learn new techniques for giving and receiving feedback. Participants will leave with new skills they can put into action immediately.

Course Objectives

- Recognize the importance of feedback as a tool for personal and professional growth.
- Identify common barriers and emotional responses that hinder effective feedback exchanges.
- Apply key “Do’s and Don’ts” for delivering feedback that is clear, respectful, and actionable.
- Demonstrate techniques for receiving feedback with openness and professionalism.
- Practice constructive feedback conversations through role plays and real-world scenarios.
- Develop strategies for creating a culture of continuous feedback and improvement within their teams or organizations.

The Human Advantage: Soft Skills That Drive Success

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

In today’s fast-paced and interconnected workplace, technical expertise alone is not enough. Employers increasingly seek individuals who demonstrate exceptional soft skills, those personal qualities, habits, and interpersonal abilities that enhance collaboration, communication, and leadership effectiveness.

This interactive workshop is designed for professionals who want to strengthen the behaviors that create lasting value and impact. Participants will explore and practice the “Top 11 Soft Skills” recognized as essential for professional success, including communication, adaptability, teamwork, problem-solving, and emotional intelligence. Through engaging discussions, self-assessments, and practical exercises, attendees will learn proven techniques to build trust, foster collaboration, and present themselves with professionalism and confidence.

By the end of the session, participants will leave with a personalized action plan to apply their enhanced soft skills in the workplace—and beyond—to drive success, strengthen relationships, and achieve continuous growth.

Course Objectives

- Differentiate between hard skills and soft skills and explain how both contribute to professional success.
- Recognize the value and impact of soft skills in the workplace and beyond.
- Describe how soft skills enhance effectiveness in communication, teamwork, and leadership.
- Identify and discuss the “Top 11 Soft Skills” essential for personal and professional growth.
- Complete a Soft Skills Competency Assessment to evaluate current strengths and development areas.
- Leverage individual soft skill strengths to build credibility, collaboration, and influence
- Identify specific situations where soft skills are critical to achieving positive outcomes.
- Develop targeted strategies to improve soft skill competencies in key areas of need.
- Demonstrate the practical application of soft skills through discussion and practice exercises.
- Create a Personal Soft Skills Development Plan outlining goals, strategies, and methods for continuous improvement.

Mastering Crucial Conversations: Communicating with Clarity, Confidence, and Courage

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

We've all experienced moments when an important conversation needed to happen—but hesitation, frustration, or fear of conflict kept us from speaking up. Sometimes we sugarcoat the message, hint at the issue, or use humor to soften the blow—only to find that our message was misunderstood or met with defensiveness. These missed conversations can erode trust, lower morale, and stall progress.

This highly interactive workshop helps participants learn how to speak—and listen—during high-stakes, emotional, or sensitive discussions. Through practical strategies and real-world examples, participants will discover how to express themselves clearly, stay composed under pressure, and create an atmosphere of mutual respect. When individuals and teams learn to hold crucial conversations effectively, they generate better ideas, make stronger decisions, and build unity and commitment that lead to lasting positive results.

Course Objectives

- Identify the crucial conversations that may be preventing desired personal or professional results.
- Recognize personal communication styles and reactions when under stress or conflict.
- Communicate persuasively—without becoming abrasive—regardless of the topic or situation.
- Create a safe environment that encourages open, honest dialogue and mutual respect.
- Apply techniques to effectively engage with individuals who either withdraw (“clam up”) or react defensively (“blow up”).
- Maintain emotional composure and self-control during difficult discussions.
- Distinguish between objective facts and subjective stories we tell ourselves about others’ intentions.
- Speak candidly and respectfully while preserving trust and relationships.
- Use strategies to express disagreement constructively without damaging rapport.
- Influence others through credibility, empathy, and collaboration rather than authority or force.

Mastering the Art of Difficult Conversations

Duration: 2 hours | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Navigating tough conversations is one of the most challenging — and essential — skills in today's workplace. Whether addressing performance issues, delivering constructive feedback, or managing conflict, the ability to communicate with clarity, empathy, and confidence is key to maintaining strong relationships and achieving results. In this highly interactive session, participants will explore proven techniques for preparing, initiating, and managing difficult discussions. Through practical exercises, real-world scenarios, and guided reflection, they will build the confidence and skillset needed to turn challenging conversations into productive, trust-building opportunities.

Course Overview

- Recognize the common causes of difficult conversations and their impact on workplace relationships
- Apply a structured approach to prepare for and engage in challenging discussions
- Use effective communication techniques to balance clarity, empathy, and accountability
- Manage emotions — their own and others’ — to keep conversations constructive and on track
- Develop strategies to turn difficult conversations into opportunities for understanding, collaboration, and growth

Navigating Workplace Change: Strategies for Personal Effectiveness

Duration: ½ Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Change in the workplace is constant — and how individuals respond can make all the difference. This interactive session equips participants with practical tips and tools to stay effective, focused, and resilient during periods of organizational transition. Through guided discussions, hands-on activities, and real-world examples, participants will gain a clearer understanding of the change process and how to successfully adapt to evolving work environments. Designed for individual contributors, this course builds the confidence and skills needed not just to manage change, but to thrive through it.

Course Objectives

- Understand the key stages of the organizational change process and their impact on employees
- Recognize personal reactions to change and strategies to manage them effectively
- Apply practical tools to remain productive, flexible, and positive during transitions
- Communicate more effectively with leaders and peers to support change initiatives
- Develop an individual action plan for adapting and contributing to organizational success

IT & Data Analytics

Advanced Excel for Financial Professionals: Tools to Automate, Analyze and Audit Financial Data

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is designed specifically for accounting professionals who want to deepen their Excel skills for financial reporting, data analysis, and process automation. Participants will explore essential Excel tools and techniques used by CPAs to clean, analyze, and summarize financial data efficiently. Topics include PivotTables and PivotCharts, VLOOKUP and XLOOKUP, Data Validation, Conditional Formatting, Macros and VBA, Power Query, and Power Pivot.

Course Objectives

- Summarize and visualize large volumes of financial data using PivotTables and PivotCharts.
- Use VLOOKUP and XLOOKUP to cross-reference accounting records across multiple datasets.
- Apply Data Validation techniques to prevent entry errors and ensure consistency.
- Highlight risks, outliers, and key metrics using Conditional Formatting.
- Record and edit Macros to automate repetitive month-end close tasks.
- Clean and consolidate financial exports using Power Query.
- Build Data Models and perform scenario analysis with Power Pivot and What-If Analysis tools.

Introduction to AI in Excel for Financial Professionals

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is designed for Financial Professionals to enhance financial insight through intelligent analytics. It is practical and immediately applicable, with a focus on how AI can support financial analysis, auditing, forecasting, fraud detection,

and reporting in Excel.

SOFTWARE*

- Microsoft Excel with Copilot added to Excel (Microsoft 365 / Excel Online): <https://copilot.cloud.microsoft>
- ChatGPT for Excel (via Add-ins or API).
- Analysis ToolPak (via Add-ins).
- Power Query, Analyze Data, Power Pivot & Forecast Sheet in Excel.
- Possibly more Add-ins (Free).
- Access to ChatGPT.

*Assume IT helps with the installation.

Course Objectives

- Use Excel's built-in AI features to analyze financial data
- Automate common reporting and audit tasks using intelligent tools
- Build forecasts and detect anomalies in cash flow and expenses
- Apply AI-driven features like Analyze Data, Forecast Sheet, and Power Query

Using ChatGPT for Data Analysis with Excel and Power BI

Duration: 1/2 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Unlock the power of AI to elevate your data analysis skills in this interactive, instructor-led workshop. Using ChatGPT for Data Analysis with Excel and Power BI is a practical, hands-on course designed for analysts, finance professionals, and Excel/Power BI users who want to streamline tasks, uncover insights faster, and automate repetitive processes using natural language.

Through guided activities and real-world scenarios, you'll learn how to craft effective prompts, use ChatGPT to write formulas, build dashboards, and generate analysis summaries - all while understanding the limitations and best practices of AI assistance. This 4-hour course equips you with the tools to integrate ChatGPT into your day-to-day data workflow and communicate more effectively with your AI co-pilot.

Course Objectives

- Identify how ChatGPT supports data analysis in Excel and Power BI.
- Craft clear, targeted prompts to generate accurate and useful AI responses.
- Evaluate and refine ChatGPT outputs for reliability, accuracy, and clarity.
- Use ChatGPT to write and troubleshoot Excel formulas, from simple calculations to more complex Excel functions.

- Apply ChatGPT to generate and explain relational data connections and how to ensure proper data connectivity in Power BI.
- Use ChatGPT prompts to evaluate disjointed data output in Power BI visualizations.
- How to apply DAX measures in Power BI to troubleshoot and repair incoherent data connection issues in visual designs.
- Use ChatGPT to complete hands-on lab exercises.

Microsoft® Excel: Power Query

Duration: 1/2 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This four-hour course is designed to teach you how to use Power Query in Excel for data transformation, cleaning, and automation. By the end of the course, you will be proficient in importing, reshaping, merging, and automating your data workflows, allowing you to work more efficiently and effectively with large datasets. You will also be able to create repeatable data processes that can be refreshed with ease, saving you time and effort.

Course Objectives

- Understand what Power Query is and when to use it
- Connect to and import data from various sources
- Clean, reshape, and transform data
- Combine data from multiple tables/files
- Automate data preparation steps
- Load data into Excel for analysis

Microsoft® Excel: Data Analysis with PowerPivot

Duration: 1/2 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course involves the creation of advanced Pivot Tables in Microsoft Excel® using the add-in program, Power Pivot. Data analysis in Excel is limited to using data list or table sources constructed as flat-file databases. With Excel being a spreadsheet program and not a relational database, trying to connect to multiple data sources for advanced Pivot Table creation is not theoretically possible. By using the Power Pivot add-in program, Excel power users can now create effective data models that permit the connection to multiple data tables invariably linked by way of a relational join. Pivot Tables, thus, can be much more robust as they can be derived from a variety of data source tables. In addition, there are very powerful calculations that can be created from functions categorized as Data Analysis Expressions, or DAX functions. The Excel power user can also create both calculated fields as well as summary calculations known as Measures. These Measures can also be expressed ironically in the form of KPI's, or Key Performance Indicators, which essentially are graphics depicted by logical conditions.

Course Objectives

- Review of Pivot Table basics
- Understanding Relational Databases
- Creating a Data Model in Power Pivot
- Developing Data Relationships
- Creating Pivot Tables from the Power Pivot data model

- Creating calculated fields
- Creating summary calculations (measures)
- Using DAX functions
- Utilizing Key Performance Indicators (KPI's)

Introduction to AI in Power BI

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is designed to learn the fundamentals of the several AI-powered topics you can explore within Power BI, particularly relevant for business intelligence, financial analytics, or forecasting use cases.

Course Objectives

- Understand the Role of AI in Power BI for Business Intelligence and Analytics
- Apply Descriptive and Diagnostic AI Tools to Explore and Explain Data Trends
- Use Predictive AI Techniques to Forecast and Model Business Outcomes
- Leverage Generative and Cognitive AI Features to Automate Insights and Enhance Reports
- Integrate Custom AI Models and Scripts Using R, Python, and External APIs
- Build Interactive, AI-Enriched Dashboards for Decision Support and Data Storytelling

Microsoft® Power BI® Data Analytics Introduction

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course involves the creation of exploration, analysis, and reporting of data insights and trends using the Microsoft Power BI® software. Power BI was built to connect to a wide range of data sources and allows users to quickly create visualizations of connected data to gain such insights, trends, and reports. Power BI's data connection capabilities and visualization features go far beyond those that can be found in spreadsheets, allowing users to create compelling and interactive worksheets, dashboards, and stories that bring data to life and turn data into thoughtful action.

Course Objectives

- Analyze data with self-service BI.
- Connect to data sources.
- Perform advanced data modeling and shaping.
- Visualize data with Power BI.
- Enhance data analysis.
- Model data with calculations.
- Create interactive visualizations.
- Perform advanced analysis.
- Publish and share reports and dashboards.
- Extend access to Microsoft Power BI.

Microsoft® Power BI® Intermediate: From Data Modeling to Interactive Dashboards

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This intermediate-level course takes Power BI users beyond the basics and into the world of scalable, professional-grade reporting. Participants will gain hands-on experience in modeling complex datasets, transforming queries for clean analysis, and building dashboards that tell compelling, data-driven stories. Key topics include designing star schemas, creating DAX measures with variables, developing drill through and dynamic visuals, and publishing reports with secure data access. By the end of the course, users will have the skills to deliver powerful, interactive reports that support enterprise-level decision-making and performance tracking.

Course Objectives

- Build and manage star schema models for efficient data analysis
- Apply advanced Power Query transformations including merging, appending, and grouping data
- Create dynamic, interactive visuals and custom tooltips
- Develop professional DAX measures using variables and logic
- Implement drill through reports and page navigation features
- Apply Row-Level Security (RLS) and publish reports to Power BI Service
- Set alerts and goals within dashboards for real-time monitoring

Introduction to Microsoft SQL Programming – Level I

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is designed to learn the fundamentals of SQL and describe the Database relationship and introducing DML statements and DDL statements. Hands on action query and a SELECT query, and more coding techniques that can make your SQL code easier to read and maintain.

Course Objectives

- Understand the Structure and Purpose of Relational Databases
- Write and Execute Basic SQL Statements
- Develop Intermediate SQL Query Skills
- Utilize SQL Functions and Expressions for Data Analysis
- Perform Complex Joins Between Tables
- Create and Maintain Database Structures
- Write Efficient, Readable, and Maintainable SQL Code

Intermediate Microsoft SQL Programming – Level II

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This intermediate SQL course is designed for users who are ready to move beyond the basics and tackle more complex queries. Participants will learn to write advanced SELECT statements with refined filtering, perform a variety of joins (including outer, self, and cross joins), and master subqueries for dynamic data retrieval.

The course also covers set operations (UNION, INTERSECT, EXCEPT) and advanced aggregation techniques using GROUP BY, CASE, and powerful window functions like ROW_NUMBER() and RANK(). Through hands-on exercises, learners will develop the skills to build efficient, scalable, and insightful queries for real-world data analysis.

Course Objectives

- Write Advanced SQL SELECT Statements with Complex Filtering and Deduplication Techniques
- Perform Complex Joins Including Outer, Self, and Cross Joins to Retrieve Related Data
- Use Subqueries in Various Clauses to Support Nested and Correlated Data Retrieval
- Apply SQL Set Operations to Combine and Compare Query Results Effectively
- Implement Advanced Aggregation, Grouping, and Window Functions for Analytical Queries

Advanced Microsoft SQL Programming – Level III

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Take your SQL skills to the next level with this hands-on, advanced course designed for professionals who want to master complex data operations and performance optimization. You'll learn how to write sophisticated queries using Common Table Expressions (CTEs), recursion, and pivoting techniques. Dive into stored procedures, user-defined functions, and triggers to build powerful, automated database solutions. Explore transactional control, robust error handling, and key strategies for tuning and optimizing query performance. You'll also gain practical experience in securing data and managing large-scale data import/export operations. The course culminates in a real-world project that brings together all the advanced features in a practical business scenario.

Course Objectives

- Write complex SQL queries using CTEs, recursion, and pivot/unpivot operations
- Create and manage stored procedures and user-defined functions
- Use triggers and transactions to automate and control database operations
- Implement error handling with TRY...CATCH and custom messages
- Optimize query performance using indexes and execution plans
- Apply security best practices, including roles, permissions, and encryption
- Import, export, and transform data effectively
- Build a real-world SQL application using advanced techniques

Microsoft® End-User Courses

Microsoft® Excel Crash Course: Learn Excel in Two Days!

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This is a fast-paced course and is designed for those who have been using Excel (any version) at a basic level, as well as those who are self-taught and want to learn shortcuts and tips, plus some of the more advanced features. Packed full of information, topics range from fundamentals (using shortcuts) through advanced topics. The topics in this class are the most often used and are a combination of features taught in the Foundations, Intermediate and Advanced Topics courses.

Course Objectives

- **Navigate and Customize Excel's Interface**
Efficiently use the Ribbon, views, shortcut menus, and toolbars to work more effectively.
- **Enter, Edit, and Manage Data**
Input and modify data using a variety of tools, including AutoFill and data lists.
- **Create and Use Formulas and Functions**
Build formulas and apply common functions to perform calculations and analyze data.
- **Format Data for Clarity and Impact**
Apply cell formatting, number styles, and conditional formatting to enhance data presentation.
- **Visualize Data with Charts**
Create and customize charts to effectively communicate data trends and comparisons.
- **Set Up Worksheets for Printing**
Control page layout, breaks, scaling, and headers/footers for professional printed reports.
- **Use Tables and Filters for Data Management**
Organize, sort, and filter data using Excel tables, AutoFilter, and Advanced Filter tools.
- **Summarize Data with PivotTables**
Build, modify, and filter PivotTables to extract insights from large datasets.
- **Perform What-If and Scenario Analysis**
Use tools like Goal Seek, Data Tables, and Scenarios to model and compare business outcomes.
- **Protect and Audit Worksheets**
Apply data validation, worksheet protection, and formula auditing tools for data integrity.
- **Work Across Multiple Sheets and Workbooks**
Consolidate data, use range names, and link information across files for integrated analysis.
- **Automate Tasks with Macros**
Record and run simple macros to streamline repetitive tasks.

Microsoft® Excel 365/2024 Level I Foundations

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Microsoft Excel Level I Foundations is for users who are self-taught and typically use other's spreadsheets to enter information. This course covers navigation and the Ribbon, entering data, selecting ranges creating simple formulas and using simple functions, changing the appearance of worksheets using the Ribbon and the Format Cells Dialogue Box, and using comments in cells.

Course Objectives

- Create and save a new Excel workbook with multiple worksheets.
- Navigate the Excel interface, including the Ribbon, Quick Access Toolbar, and various view options.
- Move within worksheets and workbooks using efficient cursor and navigation techniques.
- Select cells, ranges, rows, columns, and multiple sheets for editing or formatting.

- Enter, edit, and replace data using the Formula Bar and AutoFill tools.
- Build and edit simple formulas using relative and absolute cell references.
- Use basic Excel functions and AutoSum to perform quick calculations.
- Cut, copy, paste, and insert data, rows, and columns effectively.
- Adjust and organize worksheets by renaming, copying, hiding, and rearranging sheets.
- Resize, hide, and freeze rows and columns for easier viewing.
- Format data using fonts, alignment, number formats, borders, and fill colors.
- Apply formatting quickly using the Format Cells dialog box and Format Painter.
- Create and format Tables for organized data presentation.
- Add, view, and manage cell comments to document worksheet information.

Microsoft® Excel 365/2024 Level II Intermediate

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is the second in the Excel series and is designed to help users display data in graphs and chart, use Headers and Footers and change the format/orientation/alignment on the page for printing, create and format tables with calculations, use Auto and Advanced Filters such as VLOOKUP, AVG, MAX, MIN and find records in a worksheet. The course includes creating PivotTables with calculated fields, using What-If tables, Scenarios and Problem-Solving.

Course Objectives

- Enhance Worksheets with Visual Elements
Insert and format pictures, shapes, and SmartArt to visually represent information.
Apply artistic and picture effects to create professional-quality visuals.
Organize and manage objects using the Selection Pane.
- Create and Customize Charts
Construct various chart types to visually represent data.
Modify chart layouts, styles, labels, and axes to improve clarity and visual impact.
Format chart elements using WordArt, color schemes, 3-D rotation, and combination chart types.
- Manage Page Layout and Printing Options
Set up page breaks, margins, orientation, scaling, and headers/footers.
Customize print areas and preview content for efficient printing of sheets, selected ranges, and charts.
- Create and Use Excel Tables
Design, format, and manage Excel tables for structured data.
Use table styles, perform calculations within tables, and convert tables to ranges.
Sort and filter table data using built-in and customized criteria.
- Apply Filters and Database Functions
Use AutoFilter and Advanced Filter tools to extract and analyze specific data sets.
Utilize database functions (e.g., DSUM, DAVERAGE, DMAX, DMIN, DCOUNTA) for targeted calculations.
Apply VLOOKUP functions for data retrieval with exact and approximate match settings.
- Build and Analyze PivotTables
Create, update, and customize PivotTables for interactive data analysis.
Add calculated fields, slicers, and filters to refine PivotTable reports.
Generate and modify PivotCharts from PivotTable data.

- Perform What-If Analysis and Scenario Management
Construct one-variable and two-variable data tables to explore outcomes.
Develop and apply scenarios to model different business cases or assumptions.
- Utilize Excel's Problem-Solving Tools
Apply the Goal Seek tool to find desired outcomes.
Activate and use the Solver add-in to optimize complex decision models.

Microsoft® Excel 365/2024 Level III Advanced

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course builds on topics covered in Level I and Level II. Users will learn to validate data, work with Validation Lists to protect data (including protecting files and cells with passwords and creating read-only files). You will begin to explore working with multiple worksheets to create a workbook which allows you to enter data across a group of worksheets and move and copy data from one sheet to another. Advanced topics include linking and consolidating data and updating workbooks, creating workbook templates, using Numeric and Logical Functions, and creating basic Macros.

Course Objectives

- Apply data validation rules to control data entry and create custom error alerts.
- Create and manage validation lists to standardize input options.
- Implement worksheet and workbook protection, including passwords, cell locking, and formula hiding.
- Build and edit formulas across multiple worksheets and workbooks, including grouped and linked sheets.
- Link and consolidate data from multiple sources using formula links and aggregate functions.
- Use auditing tools to trace, evaluate, and monitor formulas for accuracy.
- Apply and edit conditional formatting rules, including color scales, icons, and formulas.
- Organize complex data sets using outlining and subtotals to expand or collapse detailed information.
- Create workbook templates and use named ranges, hyperlinks, comments, and styles for consistent structure.
- Utilize key numeric and financial functions such as ROUND, INT, TRUNC, ABS, and PMT.
- Apply logical functions including IF, OR, AND, and nested IF statements for conditional analysis.
- Record, edit, and run basic macros using the Macro Recorder and Quick Access Toolbar.

Microsoft® Excel 365/2024 Formulas, Functions & PivotTables for the Advanced Excel User

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This hands-on course builds intermediate to advanced Excel skills for professionals who manage, analyze, and report data. Participants will learn to navigate Excel's interface efficiently, use formulas and functions to perform complex calculations, and organize data for clear communication. Through guided practice, learners will explore PivotTables, data analysis tools, and external data connections to gain deeper insights and streamline workflows. By the end of the course, participants will have the confidence to use Excel as a powerful analytical and decision-making tool.

Course Objectives

- Navigate the Excel interface efficiently using the Ribbon, Quick Access Toolbar, and key command groups.
- Apply essential worksheet fundamentals, including AutoSum, AutoFill, editing tools, and conditional formatting.
- Construct and troubleshoot formulas using relative and absolute references, mathematical operators, and auditing tools.
- Insert, manage, and apply a wide range of Excel functions, including logical (IF), financial (PMT), lookup (VLOOKUP), text, date/time, and statistical functions.
- Define and manage named ranges to simplify complex formulas and data management.
- Import and connect external data from Access, text files, and web sources, and manage data connections.
- Create and modify PivotTables and Pivot Charts to summarize, filter, and visualize data.
- Use What-If analysis tools (Data Tables, Scenarios, Goal Seek, and Solver) to evaluate outcomes and make informed decisions.
- Format, organize, and present workbooks clearly for professional reporting and data analysis.

Microsoft® Excel Advanced Formulas: Logicals and Lookups

Duration: 1/2 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This more advanced Excel course will demonstrate to the user how to use formulas that extend across multiple worksheets, use conditional formulas namely in the Logical category, as well as exploring the deeper function category Lookup and Reference. Aggregate functions with testing conditions will be featured where mixed-cell referencing is involved along with formulas utilizing named ranges. In addition, this course will also delve into data mining and further will expose the user on how to create array formulas.

Course Objectives

- Create and apply multi-sheet formulas to link and summarize data across worksheets.
- Use grouped worksheets to enter, edit, and calculate data efficiently across multiple sheets.
- Apply logical functions such as IF, AND, OR, and Nested IF statements for conditional analysis.
- Use conditional aggregate functions (SUMIF and SUMIFS) to calculate totals based on specific criteria.
- Incorporate mixed cell references to control formula behavior during copying or filling.
- Utilize lookup functions (VLOOKUP, HLOOKUP, LOOKUP) to retrieve data from structured tables.
- Define and apply named ranges and table fields within formulas for clarity and flexibility.
- Combine INDEX and MATCH functions to perform powerful, flexible lookups.
- Create and use array formulas and the SUMPRODUCT function for advanced multi-condition calculations.
- Build IF array formulas to perform conditional logic across ranges of data.

Extreme Excel for Business Analysis: Functions, Ratios and Data Tools

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This advanced-level course is designed for Excel power users who want to maximize their command of functions, formulas, and data analysis tools to drive high-level business insights. Participants will dive deep into a broad spectrum of Excel's most powerful function categories, including Math & Trig, Date & Time, Text, Lookup & Reference, Statistical, Financial, Logical, and Information.

Through hands-on exercises and real-world examples, attendees will construct complex profitability formulas and apply advanced tools that support strategic decision-making and financial analysis. This course is ideal for finance professionals, analysts, and other Excel-savvy users seeking to sharpen their skills and leverage Excel's full potential.

Course Objectives

- Apply statistical and logical functions (e.g., FORECAST, COUNT, RANK, SUMIF, ROUND, ISTEAD, ISNUMBER) to analyze datasets and identify trends.
- Use Lookup and reference functions (VLOOKUP, LOOKUP, INDEX, MATCH) to retrieve, compare, and cross-reference data efficiently.
- Perform financial calculations with functions such as PMT, FV, PV, IPMT, and CUMPRINC to evaluate loans, investments, and cash flows.
- Manipulate and clean text data using text functions (CONCATENATE, LEFT, RIGHT, MID, SUBSTITUTE, LEN, TRIM, etc.) for reporting accuracy.
- Work with date and time functions to calculate durations, deadlines, and time-based performance measures.
- Calculate key business metrics and financial ratios (e.g., Current Ratio, Profit Margin, ROA, EPS, Debt-to-Equity, and P/E Ratio) to assess financial health and performance.
- Design and customize advanced charts (Column, 3D-Pie, Combo, and Pie-of-Pie) to communicate financial data visually and effectively.
- Utilize data tools such as Data Validation, Text to Columns, Remove Duplicates, and Paste Special to clean, organize, and verify large datasets.
- Integrate analytical functions and visualization tools to produce accurate, professional business and financial reports.

Microsoft® Excel Macros and VBA Level 1

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course introduces participants to the world of Excel automation through macros and Visual Basic for Applications (VBA). Starting with the Macro Recorder, users learn to capture routine actions and convert them into reusable, stored macros. From there, participants explore the Visual Basic Editor (VBE) and develop foundational programming skills including variables, loops, and error handling.

By the end of this course, participants will understand the relationship between macros and VBA, know how to blueprint and write basic procedures, and have the skills to begin customizing Excel beyond its standard functionality.

Course Objectives

- Record, run, and edit macros using Excel's Macro Recorder.
- Understand the concept of macro blueprinting and development planning.
- Navigate the Visual Basic Editor and understand the structure of VBA code.
- Create, store, and run macros across multiple Excel files.
- Distinguish between recorded macros and written VBA procedures.
- Write basic VBA code using variables, constants, loops, and conditional logic.
- Debug and handle simple errors using VBA's built-in tools.

Microsoft® Excel Macros and VBA Level 2

Duration: 1 Day | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This advanced course builds upon the foundational skills introduced in *Excel Macros and VBA – Level I* and takes users deeper into the logic and power of Visual Basic for Applications (VBA). Participants will strengthen their understanding of variables, loops, and conditional structures while learning how to work efficiently with arrays and user-defined functions.

Through hands-on exercises, participants will design custom dialog forms and incorporate a variety of ActiveX controls to create interactive, user-friendly Excel applications. In addition, this course explores structured error handling, debugging techniques, and best practices for writing reliable, maintainable VBA code.

At the end of the course, attendees will be able to build customized, professional-grade automation tools that enhance productivity and deliver consistent results across workbooks and teams.

Course Objectives

- Write more sophisticated VBA procedures using variables, arrays, and logic structures.
- Create custom Visual Basic functions for use in both spreadsheet formulas and subroutines.
- Develop user-friendly dialog boxes with form controls and ActiveX objects.
- Implement structured error handling and debugging strategies to ensure program stability.
- Apply professional coding practices for efficient, maintainable macro solutions.

Microsoft® PowerPoint Crash Course

Duration: 1 or 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

Take this course to learn how to create beautiful, professional presentations using the full power of Microsoft PowerPoint. Participants will explore best practices for visual design, audience engagement, and presentation delivery while mastering both basic and advanced PowerPoint features. Through hands-on exercises and guided instruction, learners will practice using styles, templates, artwork, and multimedia to craft visually compelling slides. Whether you are new to PowerPoint or self-taught and ready to advance your skills, this two-day course will give you the confidence and tools to design dynamic, audience-ready presentations with impact.

Course Objectives

- Navigate the PowerPoint interface and confidently use the Ribbon, Tabs, and Toolbars.
- Create and design professional presentations using templates, themes, and slide masters.
- Apply effective text, image, and graphic formatting techniques to enhance visual impact.
- Incorporate SmartArt, tables, and charts to clearly communicate data and ideas.
- Customize slides with animations, transitions, multimedia, and background effects.
- Deliver engaging on-screen presentations using tools for timing, navigation, and annotations.
- Save, print, and share presentations in multiple formats for various audiences and delivery methods.

Microsoft® Project Level I

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This introductory, hands-on course is designed for individuals who understand basic project management concepts and want to learn how to effectively plan, schedule, and manage projects using Microsoft Project. Participants will learn how to create, modify, and track project plans from start to finish using practical examples and guided exercises.

The course begins with establishing a project calendar and building a detailed task list. Learners will define task relationships, dependencies, and constraints to develop a complete project schedule. Participants will then create and assign project resources—people, equipment, and materials—while managing workload, resource conflicts, and costs.

As the class progresses, students will explore key project management techniques such as resource leveling, optimizing the critical path, and setting a project baseline to track progress. Day 2 includes a comprehensive, hands-on exercise that reinforces all concepts and ensures participants gain confidence in using Microsoft Project as a powerful project planning and control tool.

Course Objectives

- Navigate the Microsoft Project interface and display project information using multiple views.
- Create a new project plan and establish a project calendar to define working time.
- Build and organize a comprehensive task list with durations, dependencies, and milestones.
- Apply task relationships, constraints, and deadlines to produce a realistic project schedule.
- Add, define, and manage project resources—including people, equipment, and materials—and assign them to tasks.
- Establish resource calendars, assign costs, and resolve resource overallocations or conflicts.
- Identify and manage the project's critical path to ensure key deadlines are met.
- Set a project baseline to measure progress and performance throughout the project lifecycle.
- Prepare and print professional project summaries and reports for stakeholders.

Microsoft® Project Level II: Advanced Tools for Managing and Reporting Projects

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This course is designed for individuals who understand fundamental project management concepts and already possess the skills to build and modify project plans in Microsoft® Project. Participants will learn how to use the software's more advanced features to manage, track, and control projects through execution. The focus is on refining schedules, customizing project data, managing costs and resources, and generating insightful reports to support effective decision-making during the implementation phase of a project.

Course Objectives

- Exchange Microsoft Project data with other applications for collaboration and reporting.
- Import, export, and visually share project information with Excel and other formats.
- Update and manage task progress, reschedule work, and apply filters for effective tracking.

- Create custom tables, fields, and views to analyze project data more efficiently.
- Manage and monitor project costs using rate tables and cost grouping techniques.
- Link supporting documents to project tasks for better documentation and traceability.
- Generate and customize visual reports to communicate progress and performance.

Microsoft® Word: From Fundamentals to Advanced Document Design

Duration: 2 Days | Delivery Format: Group Live (On-site or Virtual)

Course Overview

This comprehensive two-day course introduces participants to Microsoft® Word 2016, from the fundamentals of document creation to advanced design and automation features. Participants will learn how to produce professional, well-structured documents with consistency and style. Through hands-on practice and guided instruction, learners will develop essential word processing skills—including formatting, layout control, style management, and document automation.

The course also explores advanced tools such as mail merge, templates, SmartArt, and document collaboration features. By the end of the session, participants will have the confidence to create, format, and customize business-ready documents that enhance readability, reinforce branding, and save time through automation.

Course Objectives

- Navigate the Word interface and work efficiently with multiple document views.
- Create new documents and templates, and format text using fonts, styles, and paragraph tools.
- Apply and customize bulleted and numbered lists, tab stops, margins, and page layouts.
- Insert and manage headers, footers, watermarks, and page numbers for professional formatting.
- Design and apply custom styles and copy styles between documents for consistent formatting.
- Create and modify templates and use section breaks and columns for advanced document structure.