PERSON-TO-PERSON

A staff development company.

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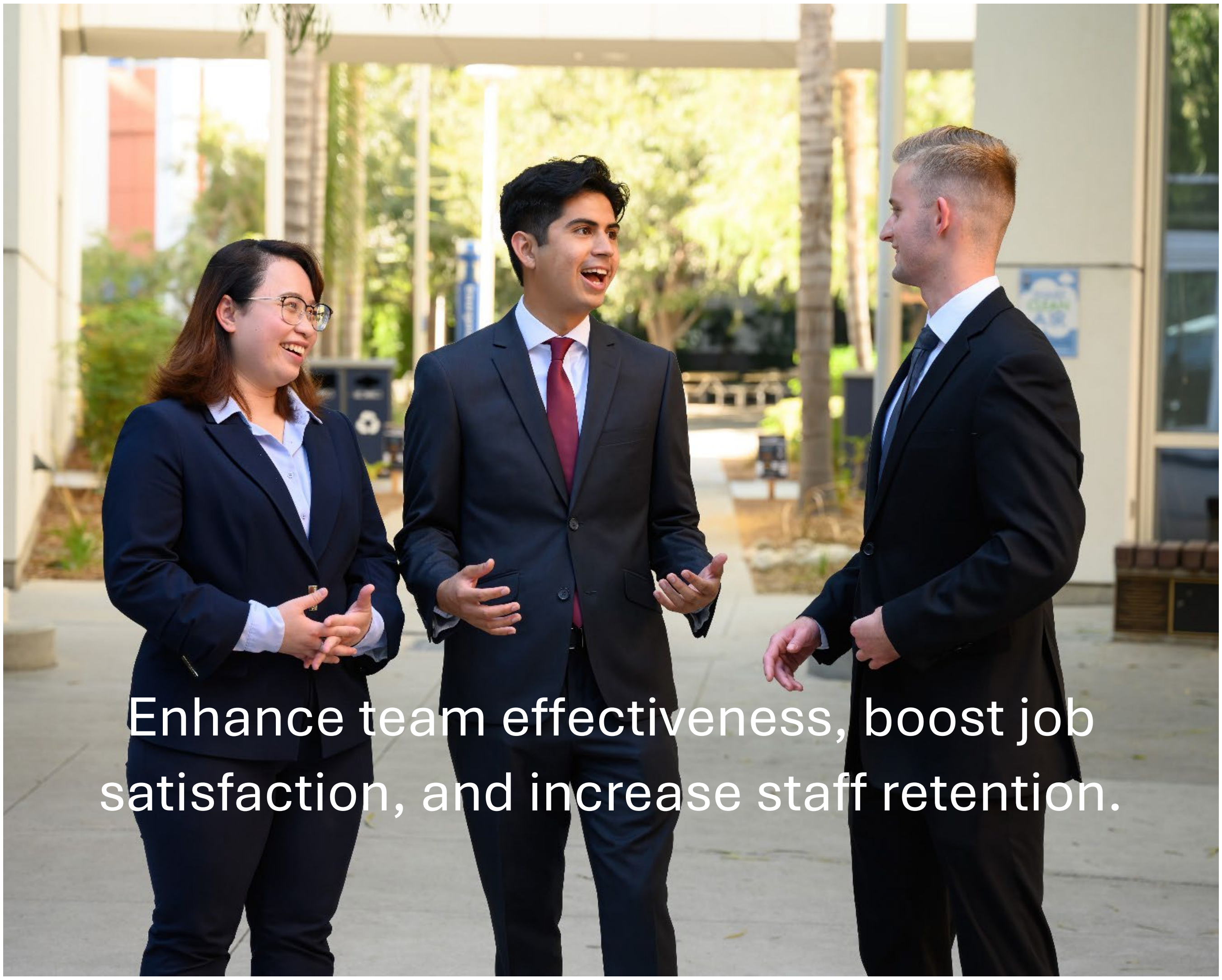
Course Catalog



Person-to-Person Training Philosophy

Get Measurable Value from Your Training Investment

We recognize that training your employees is an expensive, though essential, investment. Not only does it impact your department budget, but productivity also suffers when your staff are off task training a new hire or attending training themselves. **At Person-to-Person, we commit to work with your management team to design training programs that generate a positive trade-off between cost and benefit.** Most of our courses can be sliced, diced, and blended into a set of modules tailored specifically to your business needs.

Create a Customized Training Program to Fit Your Team

- ✓ Person-to-Person brings a *personal* approach to each of our training sessions. Authentic examples and realistic exercises keep the classes engaging and help your staff integrate new techniques into their daily work. While the best results usually happen when training is held in person, any of our courses can be delivered remotely if this works best for your team.
- ✓ Courses with duration of 6 hours or more may be broken up into modules as short as 1 hour presented over several days or weeks, if needed.
- ✓ Modules may be mixed and matched across topics to create a customized training experience.
- ✓ Some classes include self-study assignments as pre-work for the live sessions. This 'blended learning' approach has been shown to enhance retention and improve implementation of the training.

Effective curriculum development is our passion!
If you don't see a topic you're looking for, if it is in our area of expertise, we'll build it for you.

Combine Courses into a Pricing Plan that Works with Your Budget

- ✓ The price for each course is noted in the individual course descriptions. The price varies based on the complexity of the course, the cost of the training materials, and the number of participants likely to need the class.
- ✓ Package pricing is available to customers reserving 10 or more hours of training for at least 5 participants, on average, across the selected modules.
- ✓ New clients may request a reduction in the minimum number of students for each course, in addition to the package pricing option described above.

Reach for the Personal Touch
Contact Marcia Lucas at 657-999-2633 or MarciaLucas@Person-to-Person.net for details.

Table of Contents

Section 1: Interpersonal Skills

Course Number: 1.1 Working Effectively with Colleagues

Duration: 3-6 hours Level: Fundamental Price: $129/student, minimum 5 students

Course Description:

Interpersonal skills are widely regarded as the most important element of a new hire's potential for success. This course is built on decades of research conducted by Tracom, a top 20 company in the training industry. Tracom's research identified several drivers of common workplace behaviors, then applied these insights to develop techniques to promote versatility in communication styles. The course requires 3 hours of pre-work via Tracom's proprietary self-study platform. Each participant will complete an assessment of their communication style and will ask at least 3 co-workers to anonymously assess the participant's style as well. These confidential assessments will be summarized and the results shared with each participant to build awareness of the differences between how we perceive our behavior versus how others experience our interactions. The in-person training session will focus on developing versatility to shift your communication style when interacting with a variety of co-workers. After the in-person session, participants are encouraged to arrange a 1-hour coaching session with the facilitator to design an action plan to improve interpersonal versatility. Participants who improve their versatility are likely to enhance collaboration, build team cohesion, and improve job satisfaction.

Learning Objectives:

- Understand your preferred communication and working style, and how your style impacts others.
- Learn how to adjust your communication style to work more effectively with team members.
- Understand the pitfalls of your 'fallback' style when under pressure.
- Develop techniques to help diffuse tension and get the team back on track.

Activity: The Tangram Challenge *[URL for remote classes: https://mathsbot.com/manipulatives/tangrams]*

Course Number: 1.2 Business Etiquette for Young Professionals

Duration: 1 ½ hours Level: Fundamental Price: $39/student, minimum 10 students[1]

Course Description:

This course provides a comprehensive foundation in appropriate oral and written communication and personal style for young professionals. Topics include email etiquette, interacting with management, time management skills, and connecting with individuals across departments.

Learning Objectives:

- Construct effective communications that communicate clearly and leave a positive impression.
- Manage your time by maintaining your online calendar, prioritizing projects and budgeting time, setting aside 'me time' for meals and mental breaks.
- Develop professional boundaries: Learn when and how to decline a meeting invitation, a request for assistance, or an after-hours assignment.
- Become comfortable asking for appropriate help from colleagues or supervisors.
- Practice how to accept and give appropriate feedback in meetings and one-on-one settings.

Activity: The Caption Game

[1] Minimum student requirement can be adjusted for new clients.

Course Number: 1.3 The Benefits of Cultural Competency

Duration: 2 hours Level: Fundamental Price: $49/student, minimum 10 students[2]

Course Description:

Cultural competency is an essential element of a successful business. This course provides guidelines to help participants navigate the challenges and benefits of working with individuals from diverse backgrounds. Participants will learn to harness self-awareness, recognize common diversity pitfalls, and explore situations where incorporating the world views of others can improve decision-making.

Learning Objectives:

- Identify the unconscious biases each of us brings to our personal and professional interactions.
- Recognize communication differences and similarities across cultural and demographic groups.
- Practice shifting your communication style to build positive connections with colleagues from diverse backgrounds.
- Become ‘culturally humble’ and learn what not to say (or do) when interacting with individuals from unfamiliar backgrounds.
- Develop action items to take back to the workplace to integrate diverse thinking and inclusiveness into everyday activities.

[2] Minimum student requirement can be adjusted for new clients.

Section 2: Persuasive Communications

Course Number: 2.1 Creating Engaging Oral Communications

Duration: 3 hours Level: Fundamental Price: $59/student, minimum 10 students[3]

Course Description:

This is a hands-on course where participants receive coaching on specific conversations or presentations they have experienced or will experience in the near future. The focus is on creating a compelling storyline to engage the audience, be it one person or a group, and delivering a clear message about the action or outcome that is desired.

Learning Objectives:

- Recognize the purpose of the communication and focus the message on the needs of the recipient.
- Balance the time required to deliver your message with the time the audience desires to spend receiving it.
- Develop a logical and engaging storyline to lead the audience through the intended message.
- Support the message with sufficient evidence to build credibility without boring or overwhelming the audience.
- End the communication with a clear but respectful call to action or response to a previous prompt.

Course Number: 2.2 Writing with Clarity and Purpose

Duration: 3 hours Level: Fundamental Price: $59/student, minimum 10 students[4]

Course Description:

No matter where you work or what role you play, no one wants to spend more time than necessary reading emails or reports. This course will teach you how to focus your writing on the essential information that the reader needs to take the next step. You will learn to apply logic and evidence to refine your writing and help the reader see your perspective, whether they agree or not. Each participant will bring examples of written communications they have experienced or will be experiencing as the basis for course exercises.

Learning Objectives:

- Recognize the purpose of the communication and focus the message on the needs of the recipient.
- Balance the time required to deliver your message with the time the audience desires to spend receiving it.
- Structure your sentences and paragraphs to lead the audience through the intended message efficiently and without grammatical errors.
- Support the message with sufficient evidence to build credibility without boring or overwhelming the audience.
- End the communication with a clear but respectful call to action or response to a previous prompt.

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[3] Minimum student requirement can be adjusted for new clients.

[4] Minimum student requirement can be adjusted for new clients.

Section 3: Management Training

Course Number: 3.1 Managing with Emotional Intelligence

Duration: 3 hours Level: Intermediate Price: $99/student, minimum 5 students

Course Description:

Emotional Intelligence (‘EQ’) is defined as the ability to perceive, use, understand, manage, and handle emotions. Individuals with high emotional intelligence are able to recognize their own emotions and those of others, then adjust their communication style to lead to more productive outcomes. This course will explore the difference between IQ and EQ, then practice applying emotional intelligence techniques in a variety of workplace settings.

Learning Objectives:

- Analyze the difference between IQ (Intelligence) and EQ (Emotional Intelligence) in regard to potential career success.
- Recognize the interplay between your emotional state the that of your team members, then shift your communication style to build trust and respect with your team.
- Practice communicating a business vision for your team connecting effort with rewards.
- Learn how to provide constructive feedback that motivates change and promotes job retention.

Course Number: 3.2 Transitioning from Staff to Supervisor

Duration: 3 hours Level: Intermediate Price: $99/student, minimum 5 students

Course Description:

Most supervisors are promoted to their positions because of competence in their field, not necessarily their proficiency with managing others. Often times new supervisors receive little or no training on how to navigate their new role. This course addresses common challenges faced by new supervisors and provides participants with tools and techniques to be successful in their supervisor role.

Learning Objectives:

- Develop techniques to manage the changing relationship from co-worker to supervisor.
- Learn how to provide constructive feedback without damaging team cohesion and effectiveness.
- Incorporate business goals and team dynamics into your team discussions.
- Identify meaningful, achievable goals for individual team members and practice providing periodic feedback to promote professional growth.

Course Number: 3.3 Tools and Techniques for Difficult Conversations

Duration: 3 hours Level: Intermediate Price: $99/student, minimum 5 students

Course Description:

Sooner or later every manager is faced with the prospect to delivering bad news to his or her team members. This may be job cuts, lack of salary increases, added workload, the need for corrective behavior, or many other challenging situations managers face. This course uses role play scenarios to address these difficult situations with empathy while being firm about the required changes. Participants should bring recent or expected difficult interactions to the training to make the exercises relevant to your daily work. Completing the Managing with Emotional Intelligence course prior to this course is recommended, but not required.

Learning Objectives:

- Leverage team member strengths and manage weaknesses to improve productivity and job satisfaction.
- Learn how to motivate your team to achieve business goals even when salary increases are not on the table.
- Identify ways to reengage your team with the company and build enthusiasm to return to the office.
- Use active listening and empathy to build trust and inspire positive change in team members needing corrective action.
- Know when and how to place a team member on warning of possible termination.

Section 4: Personal Finance

Course Number: 4.1 Making the Most of Your 401k

Duration: 1 ½ hours Level: Fundamental Price: $39/student, minimum 10 students[5]

Learning Objectives:

- Evaluate the potential risk and return of the investment options provided by the company.
- Understand historical correlations between asset classes to manage investment risk.
- Recognize the benefits of 'dollar cost averaging' and holding on for the long term.

Course Number: 4.2 Getting a Handle on Your Personal Finances

Duration: 2 hours Level: Fundamental Price: $49/student, minimum 5 students

Learning Objectives:

- Create a personal balance sheet, income statement, and monthly budget to identify financial risks and opportunities.
- Develop an action plan to achieve short, intermediate, and long term financial goals.
- Implement a timeline to check progress and make needed adjustments.

Course Number: 4.3 Using Math to Make Better Financial Decisions

Duration: 1 1/2 hours Level: Intermediate Price: $39/student, minimum 5 students

Learning Objectives:

- Learn the basics of personal financial forecasting to estimate a trajectory for your net worth.
- Quantify the cost vs. benefit of financial decisions using Net Present Value, Internal Rate of Return, Profitability Indexing, and Scenario/Sensitivity Analyses.
- Prioritize objectives to be achievable, time-based, and optimize benefit vs. cost.

[5] Minimum student requirement can be adjusted for new clients.

Section 5: Investment Essentials

Course Number: 5.1 **Introduction to Investments**

Duration: 6 hours Level: Fundamental Price: $99/student, minimum 10 students[6]

Course Description:

New financial analysts as well as investment company support staff are highly encouraged to take this course to better understand the business in which they are engaged. Topics include characteristics of securities markets and investment vehicles such as mutual funds and ETFs, stock and bond valuation, fundamental and technical analysis, selection and management of securities using the Capital Asset Pricing Model and other valuation models, asset allocation and portfolio analysis.

Learning Objectives:

- Learn the language of the financial markets to develop a personal investment plan
- Understand the mathematical foundation for stock and bond pricing
- Distinguish between the risk and return characteristics of different types of stocks and bonds
- Separate the signal from the noise to evaluate impact of news reports on the financial markets
- Recognize market conditions where higher risk is acceptable and when caution is prudent

Training Modules[7]

Module 1 – 1 hour
1. Introduction to the Financial Markets and Institutions
2. Making a Personal Investment Plan
3. Measuring Success vs. Market Indexes

Module 2 – 1 hours
1. Balancing Risk and Return
2. Capital Asset Pricing Model
3. Creating an Efficient Portfolio
4. Activity: Investment Jeopardy, Round 1

Module 3 – 1 hours
1. 'Top Down' and 'Bottom Up' Security Selection Techniques
2. Dividend Discount, Relative Value, and Discounted Cash Flow Stock Valuation Models

Module 4 – 1 ½ hours
1. Risks and Benefits of Bonds
2. Bond Valuation
3. Understanding the Yield Curve
4. Activity: Investment Jeopardy, Round 2

Module 5 – 1 ½ hours
1. Evaluating Mutual Funds and ETFs
2. Asset Allocation and Risk-adjusted Return Measures
3. Activity: Investment Jeopardy, Final Round

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[6] Minimum student requirement can be adjusted for new clients.

[7] Mix and match modules to suit the needs of your team. Modules can be combined across courses.

Course Number: 5.2 Portfolio Management for Stocks and Bonds

Duration: 6 hours Level: Intermediate Price: $99/student, minimum 5 students

Course Description:

This course teaches students how to make evidence-based decisions for personal investing or preparation for careers in financial planning or asset management. Specific topics include investment research methods, portfolio management techniques, introduction to financial statement analysis, introduction to cash flow forecasting, and professional ethics. Prior completion of the Introduction to Investments course or similar course at a college or university is highly recommended but not required.

Learning Objectives:

- Recognize opportunities and risks associated with stock and bond securities in different economic and market environments.
- Prepare cash flow forecasts, peer comparisons, and/or discounted cash flow models to estimate the fair-value of stocks and bonds.
- Align investment recommendations with the objectives of a specific client portfolio.
- Interpret statistical measures such as Sharpe ratio, tracking error, and information ratio to accurately measure portfolio risk and return compared to a designated benchmark index.
- Apply performance attribution techniques to evaluate the success of active investment decisions in a portfolio context and identify necessary changes to investment strategies.

Training Modules[8]:

Module 1 – 1 hour
1. Investment Philosophy and Process
2. The Art and Science of Asset Allocation
3. Choosing the Right Investment Vehicle (mutual funds, ETFs, direct investments)

Module 2 – 1 hours
1. Top-Down Investing: Identify Risks and Opportunities Across Market Sectors
2. Fixed Income Fundamentals: Understanding ‘Duration’ to Manage Interest Rate Risk
3. Fixed Income Fundamentals: Using Peer Comparisons to Manage Credit Risk

Module 3 – 1 ½ hours
1. Equity Fundamentals: Financial Strength vs. Fair Value
2. Introduction to Discounted Cash Flow Models
3. Scenario Analysis and Stock Valuation

Module 4 – 1 ½ hours
1. Managing – not Eliminating – Investment Risk
2. Performance Analysis and Investment Reporting
3. Activity: Building an Efficient Investment Portfolio

Module 5 – 1 hours
1. Persuasive Written Communications
2. Persuasive Oral Presentations

[8] Mix and match modules to suit the needs of your team. Modules can be combined across courses.

Course Number: 5.3 Excel Skills: Creating a Discounted Cash Flow Model

Duration: 6 hours Level: Intermediate Price: $99/student, minimum 5 students

Course Description:

This hands-on course integrates Excel skills with step-by-step instructions to create a cash flow forecast and estimated fair value for the stock of a sample business. Students will create a probability-weighted scenario analysis to develop upper and lower boundaries for the projected stock price. The discounted cash flow valuation will be compared with peer multiples valuation as a reasonableness check to finalize the target stock price range. The session culminates with a writing exercise where participants summarize the basis for their recommendation in a brief report. Prior completion of the Portfolio Management for Stocks and Bonds course or similar course at a college or university is highly recommended but not required.

Learning Objectives:

- Practice using keystrokes and built-in functions to increase proficiency with Excel.
- Use historical financial statements to form the basis of a cash flow forecast, adjusted for non-recurring items.
- Perform industry and peer analyses to determine a base case financial growth target based on competitive advantages, industry dynamics, and macroeconomic factors.
- Develop upper and lower stock valuations based on reasonable estimates of maximum and minimum growth rates over the forecast period.
- Recognize outlier price estimates versus market forecasts to identify errors in the model.

Training Modules:

Module 1 – 1 ½ hours
1. Interpreting Financial Statements
2. Creating a Financial Peer Comparison

Module 2 – 1 hour
1. Transitioning from Historical Financials to a Cash Flow Forecast
2. Developing Base Case Growth Targets from Industry Analysis and Qualitative Data

Module 3 – 1 ½ hours
1. Creating the Optimistic and Pessimistic Cash Flow Forecasts
2. Troubleshooting the Discounted Cash Flow Valuation Methodology
3. Refining the Valuation Estimate: Probability Weights and Multiples Comparison

Module 4 – 2 hours
1. Writing an Evidence-based Investment Recommendation

Course Number: 5.4 Performance Analysis, Asset Allocation, and Fund Selection

Duration: 4 hours Level: Intermediate Price: $79/student, minimum 5 students

Course Description:

This class guides participants through a deep dive into the drivers of investment returns and the use of risk-adjusted return measures to evaluate the suitability of mutual funds and ETFs for client portfolios. Students will employ industry-standard portfolio attribution techniques to measure the impact of active and passive risk factors on the returns of sample stock and bond investment strategies. With this understanding in hand, participants will evaluate the merits of a selection of stock and bond funds to recommend an asset allocation and fund selection for sample clients. Prior completion of the Portfolio Management for Stocks and Bonds course or similar course at a college or university is recommended but not required.

Learning Objectives:

- Review common risk and return metrics such as annualized return, standard deviation, Sharpe ratio, alpha, beta, upside/downside capture, and others.
- Measure the impact of active versus passive investment strategies to evaluate manager skill.
- Evaluate the risk/reward profiles of a selection of stock and bond funds to rank fund suitability.
- Develop appropriate asset allocations and fund selections for a variety of client profiles.
- Run selected investment strategies through ex post and ex ante simulations to rate the success of the student portfolio managers.

Training Modules:

Module 1 – 1 hour

1. Measuring investment return and risk
2. Aligning investment strategies with client profiles

Module 2 – 1 ½ hours

1. Identifying common drivers of stock and bond returns
2. Applying a performance attribution model

Module 3 – 1 ½ hours

1. Evaluating the relative merits of stock and bond mutual funds and ETFs
2. Creating an appropriate asset allocation for sample clients
3. Estimating risk/return of participant investment strategies ex post and measuring results ex ante

Other Services

Management Coaching
- ✓ One-on-one coaching to address the specific professional development needs of new managers.

Curriculum Development
- ✓ Work with internal subject matter experts to create customized training for your team.

Technical Writing
- ✓ Policies and Procedures, software documentation, instruction manuals

Client Educational Workshops
- ✓ Any of our courses can be delivered to your clients, or we can design a customized workshop to suit specific client needs.