

TRAINING SERVICES, PRODUCTS & COURSES



Applied Learning



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OVERVIEW OF SERVICES AND COURSES/PRODUCTS

Applied Learning Academy (Pty) focuses on training and development needs in relation to the financial services industry, including enhancement of employment opportunities for learnership students. Through our broad experience in financial services, we are able to assist training providers and students alike in the practical application of training requirements as we understand their working environment and specific needs.

We offer:

▶ **Training support services:**

Training support services in financial services are offered to companies and training providers and include:-

- Facilitation;
- Development of training material and assessments;
- Assessing and moderation services (INSETA accredited programmes);
- Customisation of technical, product or in-house courses to meet a specific objective;
- Assistance with formulating training solutions.

Training services have been provided for over a decade at all NQF levels and across all financial services sectors. Developers and facilitators are qualified and experienced and only accredited assessors and moderators are utilised for the development or marking of assessments.

Industry qualifications such as the INSETA- aligned Short Term Insurance Certificate as well as non aligned training services are accommodated. Our team is qualified to deliver services across all the financial services industry qualifications.

▶ **Training courses/products:**

Training and products are offered in the financial services sector as well as general areas:-

- Regulatory exam training and products;
- Corporate courses focusing on specific organisational development objectives.

Methodology

Development of training material and assessments is tailored to suit the preferences of the business. Every effort is made to ensure that written work is original, researched, accurate and current.

Different facilitation styles are used in conjunction with a range of aids to stimulate learning and interaction, and to create a platform for experiential learning, e.g. classroom activities and discussion, homework tasks, video clips, templates, and real life examples. Throughout all programmes, the aim is to translate the concepts into effective and practical outcomes that can be applied in the workplace and life.



FAIS REGULATORY EXAMS: TRAINING AND PRODUCTS

Introduction

We offer a wide range of services to help representatives and key individuals to successfully complete the level 1 regulatory exam through our resource centre. The workshops and resources are suited to representatives and key individuals at all levels.

Regulatory exam resources include:

- ▶ On site or public workshops;
- ▶ Support pack including summaries of key information and exam tips and techniques;
- ▶ Mock exams;
- ▶ Exam analysis.

Services are offered as a package, or may be individually selected.

Workshops for representatives (RE5) and key individuals (RE1)

Face to face workshops are offered. These are intensive workshops and cover all the required knowledge areas as well as exam techniques and information and practice questions. The regulatory exam workshops for either representatives or key individuals are held over a two day period.

Content: regulatory exam workshop for representatives

- ▶ Representative's duties;
- ▶ Licensing;
- ▶ Obligations in terms of the General code (disclosure, etc);
- ▶ Financial products;
- ▶ Debarment;
- ▶ Compliance officer and compliance functions;
- ▶ Record keeping;
- ▶ Money laundering legislation;
- ▶ Exam information and techniques to use when answering questions.

Content: regulatory exam workshop for key individuals

- ▶ Representative's duties;
- ▶ Key individual's duties;
- ▶ Duties in relation to recruitment and management of representatives;
- ▶ Licensing application, conditions, maintenance of a licence and obligations of a financial services provider;
- ▶ Offences, penalties, levies and directives;
- ▶ Application for sequestration or liquidation and business rescue proceedings;
- ▶ Obligations in terms of the General code from an operational point of view;
- ▶ Financial products;
- ▶ Debarment and supervision;



- ▶ Compliance officer appointment, requirements, duties and functions;
- ▶ Record keeping;
- ▶ Money laundering legislation;
- ▶ Regulatory environment (Registrar's office);
- ▶ Operational ability;
- ▶ Auditing and accounting requirements
- ▶ Exam information and techniques to use when answering questions.

Outcomes

- ▶ Preparation for further self-study;
- ▶ Understanding of the knowledge required to complete the exam successfully;
- ▶ Specific knowledge on all the topics;
- ▶ Insight into multiple choice questions and techniques to use when answering different types of questions;
- ▶ Access to additional resources through the support pack to assist students in their studies as well as strengthen exam technique;
- ▶ Knowledge on how the FAIS requirements apply in day to day work activities.

Regulatory exam support pack

The support pack may be purchased separately for self study or be used as a supplement to a workshop. This valuable support pack includes:

- ▶ **Two mock exams** with separate **detailed answer explanations** that are a useful tool to identify development areas ahead of the actual exam (an additional mock exam is available on request);
- ▶ **Summary** of all important information for key individuals including plain language explanations, diagrams and legal references – an **excellent study aid** to help digest and remember critical information (a separate summary is provided for either representatives or key individuals);
- ▶ **Summary of time periods** that arise in the legislation – there are some 30 different time lines in the legislation that are **conveniently summarised** in this resource document;
- ▶ **Exam information, tips and techniques** that help build **exam technique** which in turn contributes towards success.

A support pack is available for both the key individual and representative first level regulatory exam.



Exam pack

Where a person has already studied the content in depth and simply wants to practice ahead of the regulatory exam, the exam pack is the best option. The exam pack consists of:

- ▶ **Two mock exams** with separate **detailed answer explanations** that are a useful tool to identify development areas ahead of the actual exam (an additional mock exam is available on request).

An exam pack is available for both the key individual and representative first level regulatory exam.

Exam analysis

Applied Learning Academy offers a regulatory exam analysis service. This is especially useful for anyone who has attempted the exam a number of times and been unsuccessful. Very often, the same mistakes are made and similar disappointing results obtained even after further study.

The purpose of the analysis service is to identify an individual's specific weak or problem areas, and to provide tailored guidance and recommendations on further preparation and development for the regulatory exam. Although most requests are from people who have been unsuccessful in passing the regulatory exam after multiple attempts, the analysis service is also useful to assess exam readiness.

Please refer to our website or contact us for a quote or further information.

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CORPORATE TRAINING COURSES

Introduction

Corporate training courses are non Seta aligned courses designed to address specific developmental needs within an organisation, e.g. business communication, presentation skills and mentoring skills. Workshops are one day in duration although certain preliminary tasks may be required before the training commences. Courses can be customised to suit specific requirements and encompass both technical and soft skills.

Courses available (in alphabetical order) include:

1. Administrative support;
2. Anger management;
3. Assertiveness and self confidence;
4. Budgets and financial reports;
5. Business etiquette (more in depth than the foundational skills course on managing work);
6. Business writing skills;
7. Coaching and mentoring;
8. Communication strategies;
9. Conflict resolution;
10. Creative problem solving;
11. Customer service;
12. Emotional intelligence;
13. Facilitation skills;
14. Interpersonal skills;
15. Leadership and influence;
16. Meeting management;
17. Motivating employees;
18. Negotiation skills;
19. Personal productivity skills;
20. Presentation skills;
21. Proposal writing;
22. Sales fundamentals;
23. Stress management;
24. Supervising others;
25. Teamwork and team building;
26. Time management;
27. Workplace diversity.

The main aim, content and outcomes of each course is summarised below.

1. ADMINISTRATIVE SUPPORT

The administrative support course aims to provide core skills to manage and organise routine administrative work as well as special tasks. It is suited for administrators where tasks are deadline driven and encompasses time management principles in conjunction with performance objectives.

Content:

- ▶ Getting organised;
- ▶ Managing time more effectively;
- ▶ Prioritising time to get everything done;
- ▶ Completing special tasks;
- ▶ Verbal communication skills;
- ▶ Non-verbal communication skills;
- ▶ Self-empowerment;
- ▶ Dealing better with managers.

Outcomes:

- ▶ Effective administration tools;
- ▶ Organisational skills to be punctual and effective in written and verbal communications;
- ▶ Analysis, prioritisation and processing of information to achieve performance requirements and objectives;
- ▶ Identification of potential problems, overcoming obstacles and leveraging resources effectively;
- ▶ Managing time wisely, communicating effectively and collaborating with others skillfully.



2. ANGER MANAGEMENT

The course on anger management is useful both to the individual experiencing anger issues as well as when dealing with angry individuals, especially customers.

Content:

- ▶ The cycle of anger;
- ▶ Fight or flight response;
- ▶ Helpful and unhelpful ways of dealing with anger;
- ▶ Gaining control;
- ▶ Working on the problem;
- ▶ Solving the problem;
- ▶ Personal plan to deal with anger;
- ▶ Dealing with angry people.

Outcomes:

- ▶ Understanding of anger dynamics in terms of the anger cycle and the fight and flight theory;
- ▶ Knowledge on common anger myths and their factual refutations;
- ▶ Knowledge on helpful and unhelpful ways of dealing with anger;
- ▶ Techniques in controlling anger including reading anger warning signs and techniques to reduce anger responses;
- ▶ Understanding the difference between objective and subjective language;
- ▶ Identification of the real problem triggering an anger response;
- ▶ Skills and techniques in making a disagreement constructive, including effective negotiation and solution-building;
- ▶ Knowledge on altering, avoiding and/or accepting ways of responding to an anger-provoking situation;
- ▶ Understanding the energy curve and how it can help in responding to someone else's anger.

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3. ASSERTIVENESS AND SELF CONFIDENCE

A lack of assertiveness and self confidence can lead to disappointment in one's personal life and career and may limit personal development. Assertiveness skills help a person deal with challenges in a positive constructive manner and leads to improved self confidence and respect.

Content:

- ▶ Definition and explanations of the meaning and application of assertiveness and self confidence;
- ▶ Obstacles;
- ▶ Communication skills;
- ▶ Identifying strengths and weaknesses to evaluate oneself;
- ▶ The STAR method in dealing with situations (S = Situation, T = Task, A = Action and R = result);
- ▶ Coping techniques;
- ▶ Dealing with difficult behaviour.

Outcomes:

- ▶ Understanding of the meaning of assertiveness and self-confidence, and the four styles of communication;
- ▶ Insight into the types of negative thinking, and how one can overcome negative thoughts;
- ▶ Understanding the difference between listening and hearing, and the importance of body language and questioning skills in communication;
- ▶ Defining the importance of goal setting, and practicing setting SMART goals for assertive behaviour;
- ▶ Using methods to understand one's worth and the use of positive self-talk;
- ▶ The importance of a pleasant appearance and body language in creating a strong first impression;
- ▶ Practicing sending positive communications phrased;
- ▶ Rapport-building skills through assertive methods of expressing disagreement and consensus-building techniques;
- ▶ Practicing strategies for gaining positive outcomes in difficult interpersonal situations.

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4. BUDGETS AND FINANCIAL REPORTS

Companies deal with budgets and financial reports in some form on a regular basis. The aim of this course is to provide a basic understanding of budgets and financial reports to equip managers to make decisions based on financial data.

Content:

- ▶ Introduction to financial concepts and terminology;
- ▶ Understanding the main financial statements (statement of financial position/balance sheet, statement of comprehensive expenditure/income statement and cash flow statement) ;
- ▶ Annual reports;
- ▶ Analysis of financial statements including income, profitability, liquidity, working capital ratios and return on investments;
- ▶ Common forms of business budgets;
- ▶ Introduction to forecasting techniques;
- ▶ Managing the budget;
- ▶ Legal requirements.

Outcomes:

- ▶ Understanding of the terminology surrounding financial statements;
- ▶ Knowledge and skill to interpret financial statements;
- ▶ Analysing financial statements;
- ▶ Introduction to business budgets;
- ▶ Understanding the legal framework of financial statements.

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5. BUSINESS ETIQUETTE

Good business etiquette means being well-mannered and considerate in dealing with others to create engaging, productive and long term business relationships. This course introduces participants to business etiquette, as well as provides guidelines for the practice of business etiquette across different situations. This course is at a higher level than the foundational work readiness course.

Content:

- ▶ Understanding etiquette;
- ▶ Networking;
- ▶ Meeting and greeting;
- ▶ Dining and eating out;
- ▶ Business email etiquette;
- ▶ Telephone etiquette;
- ▶ Written letter;
- ▶ Dress;
- ▶ International etiquette.

Outcomes:

- ▶ Understanding the meaning of etiquette and how etiquette can be of value to a company or organisation;
- ▶ Understanding the guidelines on how to make effective introductions including giving a handshake;
- ▶ Identifying the three main ways to make a good impression;
- ▶ Knowledge of different levels of conversation;
- ▶ Understanding place settings, napkin etiquette, basic table manners, protocol in ordering in a restaurant, handling alcohol in a business meal, paying the bill and tipping;
- ▶ Understanding basic guidelines when it comes to the proper form of address, grammar standards and use of acronyms in e-mails;
- ▶ Understanding basic guidelines in the use of the telephone, voicemail and cell phone.

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6. BUSINESS WRITING SKILLS

The business writing skills course serves either as a refresher or an introduction to basic writing concepts (such as spelling, grammar, and punctuation). The course includes an overview of the most common business documents, e.g. reports and agendas and right actions to enhance professional communication. It is one of our recommended courses for entry level employees or learners on a learnership as the difference between acceptable forms of communication through social media such as Whatsapp and FaceBook and writing in a business context is not always understood or appreciated.

Content:

- ▶ Spelling and grammar;
- ▶ Constructing sentences and creating paragraphs;
- ▶ Basic structure, format and style of:
 - Agendas;
 - E-mails;
 - Business letters;
 - Reports;
 - Proposals
- ▶ Proofreading and finishing.

Outcomes:

- ▶ Increasing awareness of common spelling and grammar issues in business writing;
- ▶ Review of basic concepts in sentence and paragraph construction;
- ▶ Knowledge of the basic structure of agendas, email messages, business letters, business proposals, and business reports;
- ▶ Tips and techniques to use when deciding the most appropriate format to use in a particular scenario;
- ▶ Basic knowledge on other forms of business communication, e.g. a request for proposals, executive summaries;
- ▶ Defining proofreading and understanding techniques in improving proofreading skills;
- ▶ Introduction to peer review and ways that peer review can help improve business writing skills;
- ▶ Guidance on printing and publishing business writing.

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7. COACHING AND MENTORING

Coaching is a process of relationship building and setting goals and instructing an employee to improve performance while mentoring includes guidance, counseling and supporting activities to help an employee to develop. This course explains the role and functions of coaching and mentoring and provides guidance on how to implement these employee development techniques within a company.

Content:

- ▶ Introduction to coaching and mentoring;
- ▶ The GROW model (G = goal setting, R = reality check, O = options developed, and W = wrap into a plan);
- ▶ Setting SMART goals within the GROW model;
- ▶ Understanding the realities;
- ▶ Developing options;
- ▶ Wrapping into an action plan;
- ▶ Understanding of the importance of trust;
- ▶ Providing feedback to encourage growth and development;
- ▶ Overcoming obstacles;
- ▶ Understanding the difference between coaching and mentoring models, and when a particular model is better suited.

Outcomes:

- ▶ Defining coaching, mentoring and the GROW model;
- ▶ Identifying and setting appropriate goals using the SMART technique of goal setting;
- ▶ Identifying the steps necessary in defining the current state or reality of an employee's situation;
- ▶ Identifying the steps needed in defining options for an employee and turning them into a preliminary plan;
- ▶ Identifying the steps in developing a finalised plan or wrapping it up and getting the employee motivated to accomplish those plans;
- ▶ Identifying the benefits of building and fostering trust with employees;
- ▶ Identifying the steps in giving effective feedback while maintaining trust;
- ▶ Identifying and overcoming common obstacles to the growth and development of an employee;
- ▶ Identifying when the coaching is at an end and transitioning an employee to other growth opportunities;
- ▶ Identifying the difference between mentoring and coaching, using both to enable long-term development through a positive relationship with an employee.

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8. COMMUNICATION STRATEGIES

Communication is a means of sending or receiving information; it goes beyond the actual words used. While written or verbal contact is made between parties on a constant basis, more than 70% of employees in South Africa highlighted the need for better communication from managers (survey conducted by PTD – *The state of employee engagement in South Africa*). In contrast, 0% of managers who responded believed that there was no need for improved communication. Communication between managers and employees, as well as between employees in different positions and customers can be improved if better understood and better skills are developed. This course provides insight into the different forms of communication, and the more subtle aspects that impact on the success or failure of communication.

Content:

- ▶ The big picture of communication;
- ▶ Identification and understanding communication barriers;
- ▶ The influence of paraverbal factors on communication ,e.g. pitch, tone and speed;
- ▶ The influence of non verbal communication, e.g. body language gestures;
- ▶ Verbal communication using the STAR method;
- ▶ Listening skills;
- ▶ The types of questions and appreciative enquiry;
- ▶ The art of conversation;
- ▶ Advanced communication skill and using “I” messages.

Outcomes:

- ▶ Understanding communication;
- ▶ Identifying different forms of communication;
- ▶ Identifying barriers to communication and how to overcome them;
- ▶ Developing non-verbal and paraverbal communication skills (how we say something);
- ▶ Using the STAR method to speak on the spot;
- ▶ Listening actively and effectively;
- ▶ Asking good questions;
- ▶ Using appreciative inquiry as a communication tool;
- ▶ Adeptly conversing and networking with others;
- ▶ Identifying and mitigating precipitating factors;
- ▶ Establishing common ground with others;
- ▶ Using “I” messages.

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9. CONFLICT RESOLUTION

Conflict is inevitable and if employees are better equipped to deal with conflict situations effectively, the repercussions can be minimised or used constructively for improvement. This course provides a step by step process to resolve conflicts and deal with anger using 'the agreement frame'. The tools and skills are useful in one's personal life as well.

Content:

- ▶ Introduction to conflict resolution and the process;
- ▶ Conflict resolution styles;
- ▶ Creating an effective atmosphere;
- ▶ Creating a mutual understanding;
- ▶ Focusing on individual and shared needs;
- ▶ Generating options;
- ▶ Building and implementing a solution.

Outcomes:

- ▶ Understanding of conflict and the meaning of conflict resolution;
- ▶ Understanding all six phases of the conflict resolution process;
- ▶ Understanding the main styles of conflict resolution;
- ▶ Being able to adapt the process for all types of conflicts;
- ▶ Being able to break out parts of the process and use those tools to prevent conflict;
- ▶ Being able to use basic communication tools, such as the agreement frame and open questions;
- ▶ Being able to apply basic anger and stress management techniques.

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10. CREATIVE PROBLEM SOLVING

There is a core process that applies to the identification and implementation of solutions for problems. This course provides an overview of the entire creative problem solving process as well as tools that be applied in day to day work or home life.

Content:

- ▶ Introduction to creative problem solving;
- ▶ Gathering information;
- ▶ Defining and analysing the problem;
- ▶ Preparing for brainstorming as part of problem resolution;
- ▶ Generating solutions;
- ▶ Analysing solutions;
- ▶ Planning steps to implement solutions;
- ▶ Evaluation, recording and celebrating success.

Outcomes:

- ▶ Understanding problems and the creative problem solving process;
- ▶ Identifying types of information to gather and key questions to ask in problem solving;
- ▶ Identifying the importance of defining a problem correctly;
- ▶ Identifying and using different problem definition tools;
- ▶ Writing concrete problem statements;
- ▶ Using basic brainstorming tools to generate ideas for solutions;
- ▶ Using idea generating tools, such as affinity diagrams, the box method, the six thinking hats, and the blink method;
- ▶ Evaluating potential solutions against criteria, including cost/benefit analysis and group voting;
- ▶ Performing a final analysis to select a solution;
- ▶ Understanding the roles that fact and intuition play in selecting a solution;
- ▶ Understanding the need to refine the shortlist and redefine it;
- ▶ Understanding how to identify the tasks and resources necessary to implement solutions;
- ▶ Evaluating and adapting solutions to reality;
- ▶ Following up with solution implementation to celebrate successes and identify improvements.

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11. CUSTOMER SERVICE

In today's competitive world, product structure, benefits and pricing between companies are very often similar. Customer service has become a major differentiator between companies as customers have multiple options on where to place their business. Customers include internal and external customers; good internal and external customer service both contribute towards enhanced performance. This course provides the framework of good customer service techniques that can be applied internally or externally. It also deals with the softer skills that make a difference when serving customers, e.g. dealing with complaints in a sympathetic and constructive way, taking ownership of seeing a query through to completion.

Content:

- ▶ Internal and external customers;
- ▶ The power of attitude in service;
- ▶ Identifying and addressing customer needs;
- ▶ Generating return business;
- ▶ Face to face interactions;
- ▶ Telephonic interactions;
- ▶ Electronic interactions;
- ▶ Recovering difficult customers;
- ▶ Understanding when to escalate;
- ▶ Ten things that can be done to impress customers.

Outcomes:

- ▶ Understanding customer service in relation to all customers, both internal and external;
- ▶ Recognising how attitude affects customer service;
- ▶ Identifying customers' needs;
- ▶ Using outstanding customer service to generate return business;
- ▶ Building good will through in-person customer service;
- ▶ Providing outstanding customer service over the phone;
- ▶ Connecting with customers through online tools;
- ▶ Dealing with difficult customers.

12. EMOTIONAL INTELLIGENCE

Emotional intelligence has become recognised as a core competency that contributes significantly to an individual's effectiveness and well being. Some employers include an assessment of emotional intelligence in their recruitment processes as an employee with 'common sense' and a good attitude is more likely to contribute positively to a company than a well qualified employee with a poor attitude or poor self management skills. The emotional intelligence course provides knowledge on emotional intelligence as well as skills and tools that can be applied to further develop emotional intelligence.

Content:

- ▶ Defining emotional intelligence in terms of self management, self awareness, self regulation, self motivation and empathy;
- ▶ Skills in emotional intelligence including accurately perceiving emotions, using emotions to facilitate thinking and managing emotions;
- ▶ Verbal communication skills using focused thinking, questions and communicating with flexibility and authenticity;
- ▶ Significant non verbal communication skills;
- ▶ Social management and responsibility;
- ▶ Tools to regulate emotions;
- ▶ Gaining control;
- ▶ Business practices;
- ▶ The impact of optimism and pessimism.

Outcomes:

- ▶ Defining and practicing self management, self awareness, self regulation, self motivation and empathy;
- ▶ Understanding, using and managing emotions;
- ▶ Verbally communicating with others;
- ▶ Successfully communicating with others in a non-verbal manner;
- ▶ Identifying the benefits of emotional intelligence;
- ▶ Relating emotional intelligence to the workplace;
- ▶ Balancing optimism and pessimism;
- ▶ Effectively impacting others.

13. FACILITATION SKILLS

Facilitation in this context relates to creating the right atmosphere for a group to discuss specific objectives and managing the process to create a successful outcome. It is not a facilitator course for trainers but rather provides knowledge and tools for managers and other role players in a business to facilitate effective group discussions.

Content:

- ▶ Understanding facilitation;
- ▶ Understanding the role of the facilitator;
- ▶ The facilitation process and focus;
- ▶ Laying the groundwork;
- ▶ Tuckman's and Jensen's model of team development;
- ▶ Building consensus;
- ▶ Reaching a decision point;
- ▶ Dealing with disruptions and helping a group to resolve issues on their own;
- ▶ Addressing group dysfunction;
- ▶ Intervention techniques.

Outcomes:

- ▶ Defining facilitation and identify its purpose and benefits;
- ▶ Clarifying the role and focus of a facilitator;
- ▶ Differentiating between process and content in the context of a group discussion;
- ▶ Providing tips in choosing and preparing for facilitation;
- ▶ Identifying a facilitator's role when managing groups in each of Tuckman and Jensen's stages of group development: forming, storming, norming and performing;
- ▶ Identifying ways a facilitator can help a group reach a consensus from encouraging participation to choosing a solution;
- ▶ Providing guidelines in dealing with disruptions, dysfunctions and difficult people in groups;
- ▶ Defining what interventions are, when they are appropriate and how to implement them.



14. INTERPERSONAL SKILLS

Interpersonal skills encompass communication skills, negotiation techniques, networking and conversation skills. This course therefore provides constructive tools that can be applied in different interpersonal interactions.

Content:

- ▶ Verbal and non-verbal communication skills;
- ▶ Levels of conversation;
- ▶ Good conversation skills;
- ▶ Influencing skills;
- ▶ Sharing opinions;
- ▶ The basics of negotiation;
- ▶ Making an impact.

Outcomes:

- ▶ Understanding the difference between hearing and listening;
- ▶ Knowing ways to improve the verbal skills of asking questions and communicating with power;
- ▶ Understanding non-verbal communication and how it can enhance interpersonal relationships;
- ▶ Identifying the skills needed in starting a conversation, moving a conversation along, and progressing to higher levels of conversation;
- ▶ Identifying ways of creating a powerful introduction, remembering names and managing situations when you've forgotten someone's name;
- ▶ Understanding how seeing the other side, building bridges and giving in without giving up can improve skills in influencing other people;
- ▶ Understanding how the use of facts and emotions can help bring people to your side;
- ▶ Identifying ways of sharing one's opinions constructively;
- ▶ Learning tips in preparing for a negotiation, opening a negotiation, bargaining, and closing a negotiation;
- ▶ Learning tips in making an impact through powerful first impressions, situation assessment, and being zealous without being offensive.

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15. LEADERSHIP AND INFLUENCE

Companies appoint managers to direct activities in a particular area to achieve specified outcomes. Often managers are promoted into decision making positions because of their skills and knowledge in an area and as a result of good performance. However, unless a manager also has leadership skills, problems arise. Symptoms of a lack of leadership (rather than a lack of managerial skills) include a failure to delegate efficiently, discord between employees in the manager's team, individual team members who fall short of performance standards, complaints, higher than average staff turn-over and increased absenteeism. A successful team leader/manager needs to be both a strong leader and manager to get their team on board to follow them with the right actions towards specific goals. This course introduces the manager to leadership concepts and tools to enhance leadership skills.

Content:

- ▶ Introduction to leadership traits and principles;
- ▶ The evolution of leadership including the 'Great Man' and 'Trait' theories;
- ▶ Transformational leadership;
- ▶ Situational leadership: telling, selling, participating and delegating;
- ▶ An introduction to Kouzes and Posner as part of a personal inventory;
- ▶ Inspiring, enabling and encouraging others;
- ▶ Setting leadership goals;
- ▶ Modeling the way;
- ▶ Inspiring a shared vision;
- ▶ Challenging the process;
- ▶ The importance of encouragement, respect and trust;
- ▶ Sharing rewards, celebrating accomplishments and making celebration part of the culture;
- ▶ Basic influencing techniques;
- ▶ Setting SMART goals for a long term plan.

Outcomes:

- ▶ Defining leadership;
- ▶ Explaining the 'Great Man Theory';
- ▶ Explaining the 'Trait Theory'
- ▶ Understanding Transformational Leadership;
- ▶ Understanding the people you lead and how to adapt your leadership styles;
- ▶ Explaining leading by directing;
- ▶ Explaining leading by coaching;
- ▶ Explain leading by participating;
- ▶ Explain leading by delegating;
- ▶ Kouzes and Posner's leadership models;
- ▶ Conducting a personal inventory;
- ▶ Creating an action plan;
- ▶ Establishing personal goals.

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16. MEETING MANAGEMENT

Every meeting must serve an effective purpose and outcome. A poorly arranged meeting can mean that not all required participants attend, venue or other arrangements fail to materialise, discussions go off track and/or actions as a result of discussions are not carried out. This course provides the basic tools to initiate and manage a meeting in a systematic way to achieve its purpose and result in the desired outcome.

Content:

- ▶ Planning and preparing for a meeting;
- ▶ Time, venue, agenda, materials, invitations and logistics;
- ▶ Setting up the meeting space;
- ▶ Meeting roles and responsibilities including the chairperson, taking minutes and participants;
- ▶ Chairing a meeting;
- ▶ Dealing with disruptions and personality conflicts;
- ▶ Making the most of the meeting.

Outcomes:

- ▶ Planning and preparing;
- ▶ Identifying the participants ;
- ▶ Choosing the time and place;
- ▶ Creating the agenda;
- ▶ Setting up the meeting space;
- ▶ Incorporating electronic options;
- ▶ Meeting roles and responsibilities;
- ▶ Using an agenda;
- ▶ Chairing a meeting;
- ▶ Dealing with disruptions including cell phones and use of electronic media during meetings;
- ▶ Dealing professionally with personality conflicts;
- ▶ Taking minutes;
- ▶ Making the most of the meeting.

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17. MOTIVATING EMPLOYEES

The traditional 'stick' approach (threats in the event of non performance) or 'carrot' approach (typically a financial reward, e.g. incentive bonus) are not the best motivators for many employees, especially X and Y generation employees. A motivated employee is actively engaged at work without the need for constant supervision. Recent studies showed that about 42% of employees are not motivated to make any changes or perform functions that are not specifically listed as a job requirement. A survey conducted by Aon Insurance Company in the UK determined that just a 5% improvement in employee engagement can contribute as much as 3% to annual revenue. Employee engagement begins with the right type of motivation as described in this course.

Content:

- ▶ A psychological approach including Herzberg's theory of motivation and Maslow's hierarchy of needs;
- ▶ Object orientated theory;
- ▶ Using reinforcement theory;
- ▶ Behaviour modification;
- ▶ Using expectancy theory;
- ▶ The role of personality in motivation;
- ▶ Setting goals;
- ▶ A personal toolbox to build a personal motivation plan, encouraging growth and development;
- ▶ Motivation on the job;
- ▶ Addressing specific morale issues;
- ▶ Keeping motivated.

Outcomes:

- ▶ Defining motivation, an employer's role in it and how the employee can play a part;
- ▶ Identifying the importance of employee motivation;
- ▶ Identifying methods of employee motivation;
- ▶ Describing the theories which pertain to employee motivation – with particular reference to psychology;
- ▶ Identifying personality types and how they fit into a plan for employee motivation;
- ▶ Setting clear and defined goals;
- ▶ Identifying specific issues in the field, addressing these issues and how to maintain this going forward.



18. NEGOTIATION SKILLS

Negotiation skills are not just for employees dealing with customers or managers who negotiate deals for services. Negotiation is used in every day work and home life scenarios. This course introduces participants to the phases of negotiation, tools to use during a negotiation and most importantly, provides ways to build win-win solutions.

Content:

- ▶ Understanding negotiation;
- ▶ Getting prepared;
- ▶ Laying the groundwork and establishing common ground;
- ▶ Exchanging information – getting off on the right foot and knowing what to share;
- ▶ Bargaining and breaking an impasse;
- ▶ Mutual gain;
- ▶ Closing through consensus and wetting the terms of an agreement;
- ▶ Negotiating via telephone or email;
- ▶ Negotiating on someone's behalf.

Outcomes:

- ▶ Understanding the basic types of negotiations, the phases of negotiations, and the skills needed for successful negotiating;
- ▶ Understanding and applying negotiating concepts;
- ▶ Laying the groundwork for negotiation;
- ▶ Identifying what information to share and what to keep to yourself;
- ▶ Understand basic bargaining techniques;
- ▶ Applying strategies for identifying mutual gain;
- ▶ Understanding how to reach consensus and set the terms of agreement;
- ▶ Dealing with personal attacks and other difficult issues;
- ▶ Using the negotiating process to solve everyday problems;
- ▶ Negotiating on behalf of someone else.

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19. PERSONAL PRODUCTIVITY SKILLS

This course is one of our recommended 'all rounder' courses as it provides a practical approach to organising oneself to meet deliverables, accomplish goals and balance life.

Content:

- ▶ Setting goals;
- ▶ The importance of routines, practicing routines and ways to simplify life;
- ▶ Scheduling and tracking;
- ▶ Keeping on top of tasks;
- ▶ Tackling new tasks and projects;
- ▶ Basic project management techniques;
- ▶ Creating a workspace;
- ▶ Organising files;
- ▶ Managing e-mail;
- ▶ Beating procrastination.

Outcomes:

- ▶ Taking time out to decompress and refocus for more productive project outcomes;
- ▶ Making the effort to express good will, respect and empathy for others;
- ▶ Adapting to unexpected requests of individuals and teams by going with the flow;
- ▶ Keeping up with information dynamics;
- ▶ Attending to needs promptly and efficiently;
- ▶ Showing more respect and compassion to others to enhance productivity;
- ▶ Mutual sharing and accepting different interests, information and ideas;
- ▶ Remembering to smile and show appreciation and gratitude.

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20. PRESENTATION SKILLS

Good presentation skills can be applied at many levels, e.g. presenting a solution to an internal or external client, presenting information on an internal matter at a meeting, presenting concepts during mentoring and coaching activities. This course is at an introductory level and provides foundational knowledge and skills to conduct professional presentations. Note that a second level of the course is available that focuses on public speaking, i.e. presenting to a wider external audience.

Content:

- ▶ Creating the programme through analysis;
- ▶ Structuring the presentation by writing a basic outline, researching and expanding on the main points;
- ▶ Choosing a delivery method to suit the audience and time allocation;
- ▶ Verbal communication skills;
- ▶ Non-verbal communication skills/body-language;
- ▶ Overcoming nervousness;
- ▶ Rehearsal and practice;
- ▶ Creating visual aids;
- ▶ Using PowerPoint to create compelling presentations;
- ▶ Videos and audio aids;
- ▶ Encouraging discussion and dealing with questions.

Outcomes:

- ▶ Performing a needs analysis;
- ▶ Preparing an outline for the content and expanding on the content;
- ▶ Selecting a suitable presentation delivery method;
- ▶ Practicing verbal and non-verbal communication skills;
- ▶ Knocking down nervousness;
- ▶ Developing and using audio and/or visual aids;
- ▶ Creating targeted PowerPoint presentations;
- ▶ Interacting with the audience.

Optional additional activity

The majority of the corporate training courses provide tools and skills that can be applied in day to day activities. However, presentation skills cannot always be practiced due to lack of opportunity. We therefore recommend that participants be required to present at a second session on a specific topic to apply learning from the course while the knowledge and information is fresh. The company may nominate a topic that serves a business outcome to maximise the benefits of the course.

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21. PROPOSAL/REPORT WRITING

Proposals and reports differ from daily communication due to their length and the depth with which a topic is being tackled. A good report or proposal is well structured and carries a clear message. This course provides a guide on writing professional reports/proposals.

Content:

- ▶ Introduction to writing a report or proposal;
- ▶ Identifying the purpose and audience;
- ▶ Performing a needs analysis and formulating a goal statement;
- ▶ Preparing an outline of the framework;
- ▶ Finding facts;
- ▶ Writing skills including spelling, grammar; working with words, constructing sentences, persuasive writing, mastering voice, paragraphs, transitions and conclusions;
- ▶ Writing the proposal or report;
- ▶ Use of diagrams and illustrations;
- ▶ Checking for readability and clarity;
- ▶ Proofreading and editing to achieve a professional look and feel;
- ▶ Creating the final package.

Outcomes:

- ▶ Identifying the purpose of a proposal or report;
- ▶ Identifying different types of proposals/reports;
- ▶ Identifying and performing the steps in the writing process;
- ▶ Performing a needs analysis and formulating a goal statement;
- ▶ Preparing an outline;
- ▶ Improving writing skills with a variety of techniques;
- ▶ Using appropriate resources and ghosting to build a strong case;
- ▶ Adding illustrations;
- ▶ Proofreading and editing;
- ▶ Adding the finishing touches to create a professional-looking final product.

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22. SALES FUNDAMENTALS

This course covers the basic sales process and provides applicable sales tools to help sales people create quality sales and close more deals.

Content:

- ▶ Types of sales and common sales approaches;
- ▶ Getting prepared to make the call;
- ▶ The needs analysis and creating potential solutions;
- ▶ Creative openings for cold and warm calls;
- ▶ Making the pitch;
- ▶ Handling objections;
- ▶ Sealing the deal: closing;
- ▶ Following up;
- ▶ Managing data;
- ▶ Using a prospect board and getting referrals.

Outcomes:

- ▶ Understanding the language of sales;
- ▶ Preparing for a sales opportunity;
- ▶ Beginning the discussion on the right foot;
- ▶ Making an effective pitch;
- ▶ Handling objections;
- ▶ Sealing the deal;
- ▶ Following up on sales;
- ▶ Setting sales goals;
- ▶ Managing sales data;
- ▶ Using a prospect board.

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23. STRESS MANAGEMENT

Stress is a major factor of working life in South Africa, especially if the employee is based in the Gauteng area (faster pace of life, greater levels of traffic and higher levels of crime). Stress contributes towards many lifestyle diseases and impairs a person's ability to perform productively and enjoy quality of life. Stress management is not just a useful skill but has become a necessary skill to cope with life's demands in a healthy way.

Content:

- ▶ Understanding stress and eustress;
- ▶ Creating a stress reducing lifestyle;
- ▶ Altering the situation, where applicable;
- ▶ Avoiding the situation, where applicable;
- ▶ Accepting the situation, where applicable;
- ▶ Using planning, routines and organisational tools to reduce stress;
- ▶ Physical relaxation techniques;
- ▶ Coping with major events;
- ▶ Formulating a personal stress reduction plan.

Outcomes:

- ▶ Identifying the best approach to a stressful situation (Alter, Avoid, or Accept);
- ▶ Understanding what lifestyle elements you can change to reduce stress;
- ▶ Using planning, organisation and routines to reduce stress;
- ▶ Using environmental and physical relaxation techniques;
- ▶ Coping better with major events;
- ▶ Using a stress log to identify stressors and create a plan to reduce or eliminate them.



24. SUPERVISING OTHERS

The supervision course is aimed at enhancing the team leader or manager's supervision skills and is one of our recommended 'all rounder' courses. Although it addresses some leadership topics, the course takes a practical approach to day to day supervision of staff and is recommended for team leaders and managers.

Content:

- ▶ Setting expectations;
- ▶ Setting goals and helping others set goals;
- ▶ Assigning work: general principles, the dictatorial approach, the apple-picking approach and the collaborative approach;
- ▶ Degrees of delegation and when each is appropriate;
- ▶ Implementing delegation;
- ▶ Monitoring results;
- ▶ Providing feedback;
- ▶ Managing time using the urgent-important matrix, routines and systems;
- ▶ Resolving conflict within the team;
- ▶ Tips for special situations;
- ▶ A survival guide for the new supervisor.

Outcomes:

- ▶ Defining requirements for particular tasks;
- ▶ Setting expectations for employees;
- ▶ Setting SMART goals for yourself;
- ▶ Helping employees set SMART goals;
- ▶ Assigning work and delegating appropriately;
- ▶ Providing effective, appropriate feedback to employees;
- ▶ Managing time more efficiently;
- ▶ Helping team members resolve conflicts;
- ▶ Understanding how to manage effectively in particular situations;
- ▶ Understanding what a new supervisor needs to do to get started on the right path.

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25. TEAMWORK AND TEAM BUILDING

Teamwork is part of everyday life as we work in teams in our family unit, community and at work. This course explores different aspects of a team and ways that teams can be built up from both the leader's perspective and the team member's perspective. Additional tools and templates are provided to aid team leaders in improving team leadership and management.

Content:

- ▶ Introduction the concept of team;
- ▶ Defining success using Tuckman and Jensens' four phase model;
- ▶ Types of teams;
- ▶ The first stage of team development: forming;
- ▶ The second stage of team development: storming;
- ▶ The third stage of team development: norming;
- ▶ The fourth stage of team development: performing;
- ▶ Appropriate team building activities;
- ▶ Making the most of team meetings;
- ▶ Solving problems as a team.

Outcomes:

- ▶ Understanding the concept of a team, and its factors for success;
- ▶ Explaining the four phases of the Tuckman team development model and being able to define their characteristics;
- ▶ Knowledge of the three types of teams;
- ▶ Describing actions to take as a leader and as a follower for each of the four phases (forming, storming, norming and performing);
- ▶ Being able to discuss the uses, benefits and disadvantages of various team-building activities;
- ▶ Introduction to team-building activities that can be used, and in what settings;
- ▶ Following strategies for setting and leading team meetings;
- ▶ Detail problem-solving strategies using the Six Thinking Hats model and one consensus-building approach to solving team problems
- ▶ Identifying actions to do, and those to avoid when encouraging teamwork.

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26. TIME MANAGEMENT

Time management skills are critical to sustainable results and achieving a balance between work and home life to reduce stress and accomplish goals. This course aligns with unit standard 117171: Manage time effectively. This course is suited for entry level employees, and employees who display a lack of time management skills, e.g. an employee who is regularly late for work, appointments, meetings or deliverables.

Content:

- ▶ Analysis of activities to identify productivity in terms of quality and quantity;
- ▶ Life analysis including the link between stress and time management;
- ▶ The concept of a balanced lifestyle and an evaluation of work and personal commitments;
- ▶ Identification of support structures and resources to make improvements;
- ▶ Identification of time management tools and when each is appropriate,
- ▶ Goal setting and measurement;
- ▶ Use of the urgent/important matrix in prioritising tasks;
- ▶ Setting realistic short, medium and long term goals to achieve a balanced life style;
- ▶ Implementation of an action plan;
- ▶ Review.

Outcomes:

- ▶ Identifying, analysing and evaluating personal use of time;
- ▶ Understanding the concept of a balanced lifestyle;
- ▶ Researching aspects of a balanced lifestyle and their relationship to productivity;
- ▶ Investigating and applying tools and techniques to manage time;
- ▶ Identifying support structures that can contribute towards success;
- ▶ Creating realistic goals and action plans;
- ▶ Implementation of action plans, measurements of progress and review;
- ▶ Applying knowledge of time management to enhance own productivity and lifestyle.

27. WORKPLACE DIVERSITY

There are few places in the world that have the same level of diversity as in the South African workplace. Differences in age, gender, culture etc can lead to unfair discrimination, misunderstanding, cliques forming and segregation within a team. This course is aimed at transforming stereotyping, discrimination and other barriers to a mindset of embracing diversity. Embracing diversity means acknowledging and appreciating cultural or other differences and making the most of diverse views and backgrounds.

Content:

- ▶ Understanding diversity;
- ▶ A legal and historic view of diversity;
- ▶ Understanding stereotypes and biases;
- ▶ Breaking down barriers;
- ▶ Verbal communication skills in a diverse context;
- ▶ Non-verbal communication and some cultural differences in non-verbal communication;
- ▶ Being proactive by preventing and discouraging discrimination;
- ▶ Coping with discrimination;
- ▶ Dealing with diversity complaints as an individual, manager or organisation.

Outcomes:

- ▶ Understanding the definition, terms and history of diversity;
- ▶ Understanding the meaning of stereotypes and biases, how they develop, and the reasons for a personal perspective;
- ▶ Knowledge of strategies for removing barriers to encouraging diversity as an individual, in the workplace, and in the social community;
- ▶ Using active listening skills to receive messages in a diverse population, employing effective questioning techniques, and communicating with strength;
- ▶ Understanding the importance of body language and recognising its importance in interpersonal communications;
- ▶ Identifying ways to encourage diversity in the workplace, and prevent and discourage discrimination;
- ▶ Understanding and responding to personal complaints, and developing a support system to manage the resolution process;
- ▶ Knowledge of steps that a manager should take to record a complaint, analyse the situation, and take appropriate resolution action.

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