



Speaker Services

Contents

Contents 2

Communications Management..... 3

Financial Management 21

Human Resources Management..... 23

Legal Industry 26

Business Development/Marketing..... 30

Operations Management..... 34

Advanced Legal Process/Project Management 36

Technology 42

Technology Applications 45

Security..... 60

Communications Management

Body Language

Do you know the science of nonverbal communication? We will delve into how to use body language to communicate, influence and connect with others in a professional environment. Body language science can also help attendees understand how to decode emotions, uncover truth and increase the accuracy of workplace communications. Participants will be able to use these tips both inside and outside the office. This science-based talk will be lively and entertaining and have actionable tips.

Communication — General

1) Mastering Communications

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Mastering Communication

Whether you are leading or managing others or just looking for more effective ways to get your point across, becoming a student of communication is the key. This session will give you the tips you need to deal with difficult people, influence others, resolve conflicts and confidently convey your message at the right time.

Learning Objectives:

- Identify your communication style.
- Determine the best ways to communicate based on other styles.
- Examine best practices for conflict resolution.

10–10:30 a.m. Communication Activity

10:30–10:45 a.m. Break

10:45–11:30 a.m. Session 2: Communication Breakdown — It's Always the Same (But It's Avoidable!)

A very high percentage of practice management and client-relations problems are caused by bad communication, from decreased productivity and mistakes to dissatisfied clients and malpractice actions. The growing number of communication channels only compounds the problem. Examine technologies and techniques that will help you improve internal and external communication, reduce your stress, improve your service, generate happier clients and lower malpractice risk.

Learning Objectives:

- Explore the impact of poor communication on productivity, trust and corporate culture, as well as reliability and professionalism.

- Discover ways to eliminate breakdowns in communication.
- Develop techniques to improve internal and external communication.

11:30 a.m.–Noon Communication Activity 2

Noon–12:30 p.m. Action Plan — Next Steps

2) Communications

This fun, informative and interactive session will give you a blueprint to create a high-performing team. Participants will leave the session with a new vocabulary and appreciation of how to leverage different personalities at work.

Learning Objectives:

- Connect with different personalities.
- Leverage those differences.
- Reduce workplace drama.

3) Science of Communication

The science is clear: With higher interpersonal intelligence, we increase our income, we take fewer sick days, we feel more bonded with our team, and we are more loyal to our companies. But how can we improve interpersonal intelligence? In this talk, you will go through a series of activities to increase PQ immediately. This includes communication strategies, relationship builders and speed-reading clients and colleagues.

4) Communications

DETAILED OUTLINE

9–9:20 a.m.

Theme: Introduction and opening story to frame the conversation for the session.

Exercise: Divide the group into groups of three or four to discuss their biggest frustrations and challenges with interpersonal communication in their work environment.

9:20–9:45 a.m.

Theme: The purpose of communication, the risks when communicating and the importance of trust

Exercise: In the same groups, discuss the aspects of trust and identify five specific ways to communicate and act to build (or rebuild) trust with someone.

9:45–10 a.m.

Theme: Introduction to *The 7 Deadliest Workplace Communication Sins*

10–10:15 a.m.

Theme: Communication Sin No. 1

Exercise: Conduct an exercise with same groups to explore how Communication Sin No. 1 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

10:15–10:30 a.m.

Theme: Communication Sin No. 2

Exercise: Continue an exercise with same groups to explore how Communication Sin No. 2 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

10:30–10:45 a.m.

Break

10:45–11 a.m.

Theme: Communication Sin No. 3

Exercise: In new groups, partners explore how Communication Sin No. 3 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11–11:15 a.m.

Theme: Communication Sin No. 4

Exercise: In new groups, partners explore how Communication Sin No. 4 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:15–11:30 a.m.

Theme: Communication Sin No. 5

Exercise: In new groups, partners explore how Communication Sin No. 5 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:30–11:45 a.m.

Theme: Communication Sin No. 6

Exercise: In new groups, partners explore how Communication Sin No. 6 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:45 a.m.–Noon

Theme: Communication Sin No. 7

Exercise: In new groups, partners explore how Communication Sin No. 7 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

Noon–12:15 p.m.

Theme: Introduction to *The 4 Workplace Conversations Model* and how the seven communication sins cause three of the conversations to be the “wrong” conversation.

12:15–12:30 p.m.

Final questions, reflection on learnings, takeaways and commitment to the 1% solution for improving interpersonal communication.

5) Communications

Make Difficult People Disappear™ takes dealing with difficult people to a whole new level! This course will teach employees and leaders how to reduce their own stress levels and eliminate conflict with

others in the workplace — and at home! Make Difficult People Disappear™ provides you with 10 easily applicable steps for seeing others as different instead of difficult. Once that happens, greater acceptance, tolerance, productivity and camaraderie will be the words used to describe your employees and teams.

Learning Objectives:

- How and when to motivate team members.
- How to recognize those you lead with or without “pom-poms.”
- How to shift the mindset from one of constant difficulty and negativity to one of acceptance.
- How to assess your own needs and the needs of those you lead or work with.
- How to remove the labels that create conflict.
- How to align your expectations with the capabilities of those you lead on the team.

Writing

1) Effective Email

A single ill-considered email can mark the end of a long client relationship, the beginning of a lawsuit — or the dawn of a new opportunity. Endless email checking drains productivity and ruins focus. Managing email effectively and writing email sensibly are core competencies because, in today’s economy, email *is* business writing. In this session, we present 10 principles of effective email.

9–9:10 a.m.

Introduction: Email is business writing. Costs of poor emails and benefits of clear, appropriate emails

9:10–9:20 a.m.

1. Make sure email is the right medium for your message.

Objective: Realize that email is not the right medium for every message and be able to discern when different modalities are appropriate.

Activity: Write down situations when email, telephone or face-to-face communication would be best.

9:20–9:30 a.m.

2. Remember that emails are public documents.

Objective: Identify potential costs of emails that become public.

Activity: List types of messages that should not appear in an email.

9:30–9:55 a.m.

3. Use the three Ps.

Objective: Understand the importance of planning an email and learn to identify the purpose, analyze the reader and hone the point of the message.

Activity: Identify situations when various document purposes might be appropriate.

Activity: Identify the hot buttons and inner questions of groups to which you commonly write.

Activity: Identify the point in a sample email.

Activity: Plan an upcoming email.

9:55–10:05 a.m.

BREAK

10:05–10:20 a.m.

4. Be a credible sender.

Objective: Understand that sending too many emails, cc'ing people unnecessarily and other habits detract from one's credibility.

Activity: List actions that currently undermine your credibility.

Activity: List ways to increase your credibility as a sender.

10:20–10:40 a.m.

5. Be smart about subject lines.

Objective: Learn the importance of the subject line along with five tips for writing a successful subject line.

Activity: Write a subject line for a sample email.

10:40–10:55 a.m.

6. Include enough information.

Objective: Recognize that sending too little information can make messages unclear and harm the organization's memory of a person's work.

Activity: Revise a sample email to make it more comprehensive.

10:55–11:05 a.m.

BREAK

11:05–11:20 a.m.

7. Proofread carefully before you hit send.

Objective: Recognize that failure to proofread can destroy the impact of the message and undermine the credibility of the sender.

Activity: Proofread and correct sample sentences.

11:20–11:40 a.m.

8. Maintain appropriate tone.

Objective: Recognize that tone is an important factor in whether the reader accepts one's message.

Activity: Warm up or cool down the tone of sample emails as appropriate.

11:40–11:55 a.m.

9. Include a call to action for maximum response.

Objective: Understand that people respond to calls to action. Avoid open-ended closings to your emails.

Activity: Insert calls to action in sample emails.

11:55 a.m.–12:10 p.m.

10. Have an email strategy.

Objective: Increase focus and productivity by creating a strategy to deal with email. Commit to checking email less frequently.

Activity: List how often you need to check email every day and at what times you will do so.

Activity: List three strategies to help you manage the email in your job.

12:10–12:30 p.m.

Closing Exercises

Activity: Identify key takeaways. Review what we have covered and circle the principles you think will be most valuable to you. Think of one small change you can make in the way you use email. Commit to this one change for 30 days. The instructor will contact you in 15 days and in 30 days to support you in your commitment.

2) Writing for Impact

You don't have to be a "natural" writer to write well. You simply need to know the secrets that clear writers use to make their writing flow. In this fast-paced, interactive program, you will practice the skills for writing strong, clear, to-the-point reports, proposals and emails.

By improving your writing skills, you do more than make yourself a better employee — you develop communication and leadership skills that help you stand out and advance in your career and life.

PREREQUISITE: Every participant should bring a one-page writing sample to the session.

9–9:15 a.m.

Introduction: How does writing touch your life? What are the costs of poor writing? What are the benefits of good writing?

9:15–9:35 a.m.

Use the Three Ps

Objective: Understand the importance of planning a document and learn to identify the purpose, analyze the reader and focus on the point of the message.

Activity: Identify situations when various document purposes might be appropriate.

Activity: Identify the hot buttons and inner questions of groups to which you commonly write.

Activity: Identify the point in a sample document.

Activity: Plan an upcoming document.

9:35–9:50 a.m.

Make Your Sentences Pack Power

Objective: Understand basic sentence structure.

Activity: Identify sentences and non-sentences.

Activity: Identify the independent and dependent clauses in sample sentences.

9:50–10 a.m.

BREAK

10–11:05 a.m.

Four Ways Professional Writers Keep Their Writing Interesting

Objective: Master four techniques for writing clear, succinct sentences.

Activity: Change bulky nouns to vivid verbs in sample sentences.

Activity: Eliminate unnecessary words in sample sentences.

Activity: Change the passive voice to the active voice in sample sentences.

Activity: Revise complex sample sentences to make them clear.

Change Management

1) Change Management

Between budget cuts, layoffs and changing rules and regulations, there's a lot coming at you. And all this change causes fear, tension and miscommunication. In this popular keynote, your group will learn how to diffuse tension instantly, kick off tough conversations and facilitate communication through humor. These practical tips, infused with plenty of humor, will have attendees walking away laughing and learning how to handle and even embrace change. And they'll also learn about the connection between humor and health through the latest research. This keynote is a hit with hundreds of local, state and national organizations.

Learning Objectives:

- Participants will have practical, immediately usable skills for handling change using humor, including how to diffuse tension instantly, kick off tough conversations and open lines of communication.
- Participants will be able to understand what they should avoid doing when faced with change.
- Participants will understand the importance of adapting to change.
- Participants will understand the health benefits of using humor.

OUTLINE:

9:30–10:30 a.m.

Opening: Customized Humor and a Look at Change

The opening segment includes humor on work, family and day-to-day life as well as customized humor based on client interviews. It also encompasses a quick look at things that are changing.

Why Do We Hate Change?

Discussion of the barriers we deal with when trying to get our heads around change. Why do we need to embrace it? What stops us from welcoming change — especially tough change?

Activity: Group discussion: What changes are you currently dealing with?

10:30–11 a.m.

Humor and Change

- Presentation of the research on the health benefits of humor
- Tips for using humor appropriately

11–11:15 a.m.

BREAK

11:15 a.m.–12:30 p.m.

Handling Change

- Quick techniques to diffuse tension instantly through humor
- Ideas for kicking off tough conversations by using humor

- Procedures for changing your focus when faced with tough change

Activity: Small-group breakout: Practice solutions to given situations.

Wrap-Up

Quick overview of handling change and the previous points interspersed with additional humor and examples.

2) Change Management

Policy change! Downsizing! Mergers! Conflict! Improving morale! Law firms and legal services are clamoring for ways to manage change. This interactive presentation reveals valuable insights and ideas to help employees, teams and leaders obtain a higher level of success while managing the economic and business situations in the real world. The focus is on emotional intelligence, personal responsibility, dumping the entitlement mentality and improving self-awareness. Instead of simply preaching what is needed and expected, these tools help people navigate through the minefield of complex "gray areas" encountered in today's dynamic workplace. Customer service will be improved, client retention maximized and turnover reduced when this new approach to change is applied.

Learning Objectives:

- Establish clarity and instantly communicate needed information to manifest the changes necessary for your group. This includes how to manage those resistant to your message and how to mobilize commitment and establish a sense of urgency.
- Identify where individuals are in the levels of change and how to leverage the type of change agent they have become. These ideas improve morale and reduce turnover, keeping and attracting the best talent. In addition, your change manifesto will be reached.
- Speed-read people through their communications and behavioral style. Use the Style Awareness information, communication and listening, shortening the time needed to implement the necessary change is improved.
- Continue to use case studies in real-time situations to lead people successfully through the dynamics of change, helping the group apply the usefulness of the information through an actual business application.
- Emotional intelligence studies tell us that 10 percent of success is from cognitive knowledge and 90 percent is from building relationships and this is why it is important for everyone to know 'how to.'
 - Staying flexible to people's behavioral and communication style is a critical factor in managing change.
 - Remove dissention and conflict by learning to respond and not to react, creating the pathway to improved employee relations and excellence in client care.

- Take a deep dive into understanding the levels of change — “Victim,” “Neutral,” “Critic” and “I’m in” — and how to adapt to each of these.
- Deal with difficult situations and toxic people who resist change, helping them understand the consequences for the behavior.
- Learn why the TLC approach (Take it. Leave it. Change it.) is critical when building a path through a changing environment.
- Keep an open mind and help others do the same.
- Provide feedback by using the Liked Best – Next Time technique.

9–9:15 a.m.

Objective: Review the components of emotional intelligence and the importance of using this tool when dealing with change.

Activity: Break into pairs and provide a case study so they can practice applying emotional intelligence to a real situation.

9:15–10 a.m.

Objective: Review the four types of behavior and communication styles.

Activity: Explain the Style Awareness Assessment and have each participant complete it. Plot the results on a chart so participants can see the disposition of the group. Ask participants to identify a colleague or employee who is not readily adapting to change. Give pairs time to discuss how they will apply the Style Awareness information and how they will adapt their style to the issue.

10–10:15 a.m.

Objective: Remove dissension and conflict by learning to respond and not to react, creating the pathway to improved employee relations and excellence in client care.

Activity: Participants share with their accountability partner how they will change the approach (both mentally and verbally) to a current issue in their group or with a particular person.

10:15–10:30 a.m.

Objective: Take a deep dive into understanding the three levels of change — “Victim,” “Neutral,” “Critic” and “I’m in” — and how to adapt to each.

Activity: Ask the group to identify a person on their team who is having difficulty adapting to change and which of the three levels they are in.

10:30–10:45 a.m.

BREAK

10:45–11:25 a.m.

Objective: Review the four types of behavioral styles that people fall into when moving through the levels of change. Explain how to deal with difficult situations and toxic people who resist change, helping them understand the consequences for the behavior.

Activity: Ask the group to identify a person on their team and where they think their person fits in the four levels of change. Identify why they display those characteristics and what can be done to help them move through the stages of change.

11:25–11:35 a.m.

Objective: Learn why the TLC approach (Take it. Leave it. Change it.) is critical when building a path through a changing environment.

Activity: Pairs ask each other to identify a person who the TLC tool would be effective with. In addition, discuss the particular approach to be used in that scenario.

11:35–11:55 a.m.

Objective: Review how to keep an open mind to change and help others do the same. This will include review of the Assertive Communication Model how to say no without feeling guilty.

Activity: In pairs, individuals will be asked to identify someone who tends to have a closed mind. Using the Assertiveness model, they will write out what they would say to the person, and then practice with their partner.

11:55 a.m.–12:05 p.m.

Objective: Review ways to provide feedback by using the Liked Best – Next Time technique, leading to the outcomes needed and helping them understand the change that needs to be made. This will also assist in more effective delegation.

Activity: Ask for volunteers from the group who have used this approach to validate this tool to the rest of the attendees. Discuss why it works vs. you could have, should have, might have, etc.

12:05–12:15 p.m.

Objective: Lead change by developing listening skills and by asking specific questions.

Activity: In pairs, individuals will identify someone who is not a good listener, how they determined this and what they can do. Use any of the tools previously reviewed.

Empowerment

1) Empowerment

Learning Objectives:

- Reverse the accidental adversarial relationship between staff and attorneys/managers.
- Overcome the “drama triangle.”
- Empower your staff and managers when faced with conflict.
- Create an empowered and indispensable team.

Talk Outline:

- Common obstacles and pitfalls when creating an empowering environment.
- Five ways to generate an indispensable team.
- Three quick ways to create an empowered environment.

Training Format:

- 3.5-hour session
- Each session would include 2.5 hours of training and 1 hour for a workshop, as well as time for questions.

Leadership

1) Leadership

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Law Firm Leadership — What Good Leaders Do and Don't Do

Think that the only leaders in your firms are the partners? Think again! Successful firms have leadership coming from key employees throughout the organization — including YOU! This session will give specific examples of how to handle the types of issues you face every day and turn them into a positive through leadership tips and techniques.

Learning Objectives:

- Identify areas where their leadership skills can improve.
- Develop some leadership strategies to take back and use at their firm.
- Determine ways they can help other leaders in the firm become more successful.

10–10:30 a.m. Leadership Activity 1

10:30–10:45 a.m. BREAK

10:45–11:30 a.m. Session 2: The Importance of Leadership and Management

You have probably heard this quote from Peter Drucker: “Management is doing things right; leadership is doing the right things.” While that is certainly a great quote, there is more to it than that. To improve the leadership and management at our firms, we must understand the difference between the two and the importance in investing our time and energy to have better leaders and managers. This session will explore the differences and give you practical tips to become a better leader and manager.

11:30 a.m.–Noon Leadership Activity 2

Noon–12:30 p.m. Action Plan – Next Steps

2) Leadership

9–9:20 a.m.

Objective: Develop common language and processes for the time together.

Exercise: The group contributes to a charted list of operating rules.

9:20–10 a.m.

Objective: Develop common language about the culture of the firm.

Exercise: The group contributes word choices that describe the culture of the firm, also charted for reference throughout the morning.

10–10:30 a.m.

Objective: Explore our communication through interaction.

Exercise: Use a simple activity to emphasize communication skills to solve.

10:30–10:45 a.m.

BREAK

10:45–11:15 a.m.

Objective: Working together, we achieve more.

Exercise: Name a specific current challenge. Form small groups to approach it — all the way to resolution (future).

11:15–11:45 a.m.

Objective: Debrief the activity to explore learning and ideas.

Exercise: Small groups report out to the room. Capture information on the flip chart.

11:45 a.m.–12:15 p.m.

Objective: Create action items from the various learning activities of the morning.

Exercise: The whole group participates in setting action items that are SMART.

12:15–12:30 p.m.

Wrap-up, questions, one-word exercise

3) Leadership

9–9:20 a.m.

Theme: Our experiences create the pattern in which we see and interact with the world.

Exercise: The group is broken into teams where they need to use creative and unique questions to complete a task.

9:20–9:35 a.m.

Theme: When we move from “have to” to “get to,” we produce our best work.

Exercise: The group provides feedback to try and guess the motivations of individuals who have completed a particular task.

9:35–9:55 a.m.

Theme: By questioning the boundaries, we can create more solutions.

Exercise: In a traditional logic puzzle with a slight twist, participants try and solve a problem that is seemingly impossible but has several solutions.

9:55–10:10 a.m.

Theme: Working together, we achieve more.

Exercise: Participants have a thumb wrestle with a little twist and different kind of auction.

10:10–10:20 a.m.

Theme: The No. 1 thing that holds us back is our own perception.

10:20–10:40 a.m.

BREAK

10:40–11:40 a.m.

Theme: The 10-80-10 Principle — focus on your strength

11:40 a.m.–12:10 p.m.

Theme: Specific examples of and exercises around the 10-80-10 Principle

12:10–12:20 p.m.

Questions

12:20–12:30 p.m.

Wrap-up

4) Leadership

Effective leadership is all about communication. Understanding how to handle the most important management conversations is the key to improving team performance, retaining talent and increasing team accountability. Participants will leave this interactive session with important new communication tools.

Learning Objectives:

- A descriptive review of the five conversations leaders must get right.
- Learning when to have a certain conversation.
- Leadership scripting to make sure your conversations are successful.

5) Leadership

What if the rules for the game we played as kids crept into your office? In some ways it has, as leaders often appear to be chosen at random or picked because they got tagged, rather than because they had the right skills. But what are the ideal criteria? What skill set does your next leader need to succeed and be a good fit for the team? Duck, Duck Leader™ helps you answer that, as well as uncover pitfalls, solutions, needed adjustments and remedies for when that critical first step is skipped. This session will keep your leaders from running around chasing their position, while avoiding the negative results that stem from a leader who was promoted when they weren't ready and believes they've been goosed with the opportunity!

Learning Objectives:

- Learn three common pitfalls that occur when leaders are poorly picked and promoted.
- Get simple methods for leadership criteria selection that aligns the person and the position.
- Discover how to use four psychographic categories that reveal more than promotion interview questions.
- Develop six solutions for improving poorly prepared leaders.

6) Leadership

Any person or personality can be a leader, but for you ... is it a fit? The same style of leadership, however, is not a fit for every candidate, and many would even say the glamour of being a leader is not all it's cracked up to be. Leadership Is Not a Glass Slipper™ is the session in which you'll easily see which style works for those you lead and the skills needed to lead even more effectively. Complete with 10 steps for individualized leadership development, this session helps you find your strengths and guides you to determine which people are the best fit for your team, practice and even among the attorneys who influence your office environment.

Engaging and entertaining, understand the difference between promoted vs. prepared, be challenged to lead well, and receive guidance on how to look at leading differently. Whether your leadership skills could improve in communication, delegation, motivation, recognition or engagement, this powerful session clarifies which type of leadership "shoe" fits and whether you're the right person for it!

Learning Objectives:

- Identify key leadership actions that elevate effectiveness in communication and engagement.
- Apply identification tactics to vacancies, gaps and missing skills in your office.
- Determine, based on one's preference, whether being a leader is a role that truly and comfortably fits!

7) Leadership

Are leaders born or made? In this session, we will explore the latest fascinating neuroscience and psychology research of leadership. Attendees will turn the science into practical tips. Whether speaking to managers, employees or doctors, everyone needs to know how to harness the power of leadership. Attendees will leave both energized and inspired to try new leadership strategies in their personal and work lives.

Personal Branding

This interactive session will show the importance of continuing personal development in the workplace. It will highlight the value of a personal brand and how it influences performance and relationships. Participants will learn how to leverage and manage their personal brands to increase their influence and effectiveness.

Learning Objectives:

- Discover the difference between reputation and personal brand.
- Leverage and improve your personal brand.
- Increase your influence and connection to the mission of the organization.

Team Building

1) Team Building

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Effective Teams — Getting Things Done

Setting goals for your firm is one thing; achieving them is another. We'll outline tools you can use to help drive team definition and accountability. We'll also discuss how you can keep your teams healthy so they are functioning as productively as possible.

Learning Objectives:

- Identify your team's commonalities and differences.
- Explore root causes of inefficiency and communication styles.
- Determine the best ways to apply tools, communication and perspective to improve team productivity.

10–10:30 a.m. Team-Building Activity

10:30–10:45 a.m. Break

10:45–11:30 a.m. Session 2: Finding Common Ground in a Multigenerational Workplace

Does your firm have a mix of Traditionalists, Baby Boomers, Gen-Xers and Millennials? This session is all about understanding what motivates each group and learning about each group's perspective and style to help with workplace communication and retention. If leveraged properly, this generational mix can be used to your advantage to make your workplace more productive for all employees.

Learning Objectives:

- Explore the differences and commonalities.
- Discover how communication styles affect productivity and retention.
- Develop specific strategies to leverage each generation's strength to improve the team as a whole.

11:30 a.m.–Noon Team-Building Activity 2

Noon–12:30 p.m. Action Plans — Next Steps

2) Team Building

Great training can empower exceptional leaders. Get leader development for managers and business leaders and training to become great coaches. This approach is a training style complete with relevant content, team exercises, and participant interaction. Be prepared to learn, interact, have fun and leave with techniques you can implement right away.

AGENDA

Welcome, Connect and Overview

Part 1: Understanding your communications style and how it relates to others' styles leads to heightened productivity through better relationships, more effective communications and a better environment for everyone.

The ever-increasing pressures of the legal business — employee turnover, expecting smaller teams to do more, more remote workers and the overall competitive nature of what you do — make leading people on your team even more challenging. Organizations are human systems to be cultivated, and developing your organization takes time — which you often feel you don't have. However, sometimes slowing down and getting to know your team members' styles can result in higher productivity and better results.

Each person is unique, not just in their knowledge and skill set but also in how they approach people and problems. Research tells us that managers who are people smart (have high emotional intelligence) are better leaders, retain top performers and get the best from their people.

Learning Objectives:

- Understand and improve your emotional intelligence.
- Become more aware of your own behavior style.
- Learn to read the styles of others — in person and on the phone — and adjust your style to improve communication and increase productivity.

Lecture/Video/Discussion: Overview of Emotional Intelligence

Lecture/Reflection: Identify your primary style, its strengths and limitations and tendencies under stress

Activity: Assessment, share insights

Lecture: Observing and appreciating others behavior styles

Activity: Practice identifying styles by analyzing case studies. Start identifying styles of team members and clients.

Lecture: Adapting to each style to improve communications and workplace productivity.

Activity: Gather in groups of similar behavior style. Discuss how to best communicate and coach others' styles. Share insights and receive feedback.

Discussion: Real-life scenario application

Activity: Share, discuss and get feedback.

BREAK

Part 2: Getting to know your team members as people will speed and improve your leadership style and drive stellar results.

If you're a leader in the legal business, you can probably confirm the fact that at least 65 percent of your time is spent dealing with people issues. Industry trends like partner expectations, budget constraints and connecting with remote workers put additional pressure and demands on you and your

team. The pace is daunting. However ironic it sounds, sometimes slowing down can help managers bring out the best performance in their people and lead to better results. Possible? Absolutely.

How?

A coaching approach to leadership — which leads to more team cohesiveness, innovation, creativity and problem solving — gives you some of that time back to focus on other things. Employees who clearly understand expectations and know they're accountable enjoy a higher level of job satisfaction, stay longer and produce better results. Isn't that what we're all after?

Learning Objectives:

- Explore how to transform yourself from a manager to a coach.
- Discover the top three key skills to becoming an effective coach.
- Learn the six steps required for a successful coaching conversation.

Discussion: Who's had the biggest influence on your life?

Activity: Share insights about influences and identify commonalities: Why coach? What is coaching? How is it different than managing or mentoring? What are coaching characteristics?

Activity: Complete self-assessment of management. Identify your coaching strengths. Discuss insights from assessment.

Lecture/Video: Top Three Coaching Skills and Coaching Presence

Activity: Share experiences of coaching and being coached.

Lecture/Video: The Six Steps of the Coaching Conversation

Activity: Receive questions for use in each step of the coaching conversation. Determine how this information and insights can be useful to improve staff performance. Develop an action plan.

3) Team Building

9-9:30 a.m. **Personal and Professional Significance Starts with Choice**

- The influence of options as it relates to the power of choice.
- The need to separate responsibility and fault.
- Suggestions on creating a culture of choice.

9:30-10 a.m. **The Behavioral Model of Identity — Actions — Feelings**

- Why individuals and organizations need to use their identity as the source of their activity.
- The pros and cons of personality assessments and the power of your core words.
- The role of purpose and passion.

10-10:30 a.m. **Understanding the Influence of Fear**

- Understanding the role of fear and self-doubt in our lives.

- Reveal fears of the leader and how to recognize the fear in employees.
- The disconnect between what leaders say and what employees see.

10:30-10:45 a.m. **BREAK**

10:45-11:15 a.m. **The Need to Let Go**

- The internal and potentially damaging desire to be right.
- Interpersonal obstructions of anger, resentment and blame.

11:15-11:45 a.m. **The Importance of Embracing the Crazy**

- The element of risk and how to support it.
- Why paying attention to the small, “insignificant” things helps avoid future problems.
- The power of asking “What would be possible if ... ?”

11:45 a.m.-12:15 p.m. **Significance Exists Within Our Impact on Others**

- The difference between “giving to” and “giving of.”
- Identifying the significant moments during the professional workday.
- Understanding how significance isn’t only found in the job one has but also within the person who holds the job.

12:15- 12:30 p.m. **Wrap-up**

4) Science of Teams

This workshop helps teams reset priorities, change communication patterns and develop deeper bonds. Team members will be led through fascinating activities, exploratory exercises and science-based communications. Participants will learn the groundbreaking new science of teamwork and how to benefit from it. Specifically covered will be the psychology of team dynamics, how to increase communication effectiveness and building rapport and loyalty.

Financial Management

Profitability

8–8:30 a.m.	Registration — continental breakfast
8:30–9:15 a.m.	Alternative billing methods
9:15–10 a.m.	Profitability analysis/cost accounting methods
10–10:20 a.m.	BREAK
10:20–11:15 a.m.	Issues Related to mergers and lateral hires
11:15 a.m.–Noon	Cash flow
Noon–1:15 p.m.	LUNCH
1:15–1:25 p.m.	Accounting issues of multi-office firms
1:25–2:10 p.m.	Partner compensation and the multi-tier partnership
2:10–2:45 p.m.	Ownership and allocation of the accrual basis assets
2:45–3:30 p.m.	Question and answer period

Performance, Profitability, Innovation

Operational excellence means more than delivering quality legal services. The most successful law firms and legal departments are changing the way they deliver their legal services *and* the way they run their organizations.

This practical, hands-on workshop introduces you to an integrated approach to performance, profitability and innovation. Or, if you are in-house, to performance, productivity and innovation. Either way, you will learn where your organization sits on the PPI Maturity Model and how you can use Lean and process improvement as a foundation for key service delivery improvements.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

Learning Objectives:

- Understand operational excellence.
- Learn where they stand on the PPI Maturity Model.
- Learn how Lean can increase productivity, profitability and client service across the organization.

- Understand how integrating key initiative in pricing, process, project management, legal tech and more can drive improvements in operational excellence.

Who Should Attend?

This workshop is suitable for attorneys in private practice and in-house, para-professionals and senior law firm and legal department managers. Everyone will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

What's Operational Excellence? (15 minutes)

- What does operational excellence really mean?
- What's driving the move to operational excellence? A look at trends in the legal market.
- *Interactive exercise:* What's your Business Case for Change?

The Performance, Profitability and Innovation Maturity Model (15 minutes)

- Integrating your improvements: the PPI Maturity Model.
- *Breakout activity:* Where are you on the Maturity Model?

Building the Foundation for Operational Excellence (1 hour)

- Using a framework for improvement: DMAIC.
- Understanding value and waste in operational processes.
- *Breakout activity:* The eight wastes.
- Establishing your baseline and choosing your metrics

BREAK (15 minutes)

Improving the Process (30 minutes)

- Using maps to visualize your process.
- Setting up a mapping project.
- What outcomes to expect: case studies on process improvement projects involving how attorneys practice, as well as projects targeting the business/administrative processes that support the practice of law.

Bringing It All Together (30 minutes)

- Moving along the Maturity Model from reacting to innovating.
- Lean and process improvement as a foundation for innovation.
- *Breakout activity:* Using process maps to plan your innovations.

Question and Answer Period (15 minutes)

Human Resources Management

Diversity

This session will illuminate the statistics to diverse teams performing better. It will also discuss personal and institutional biases, while delivering a go-forward plan for building a truly diverse and inclusive organization.

Learning Objectives:

- Why diversity matters.
- Unconscious biases and how to overcome them.
- How to spot microaggressions.
- What you can do to create a more diverse workplace.

Handbook Updates

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m. Session 1: Understanding the Basics

Regardless of the size of your firm, there are certain basic concepts that must be discussed before you even begin to draft or revise the handbook. These include tone, mode of publication, purposes to be served, etc. In addition, there are certain basic policies legally that must be included (e.g., EEO, PTO, compensation, leaves of absence, etc.) in the handbook.

Learning Objectives:

- Identify your mode of handbook publication (electronically, hard copy, intranet, etc.).
- Identify legally required policies that must be included in your handbook. Determine the best ways to communicate based on other styles.
- Discuss traps into which we fall in drafting these legally required policies.

10:45–11 a.m. BREAK

11 a.m.–12:15 p.m. Session 2: Taking Your Handbook to the Next Level

While the policies discussed in Session 1 must be included, the policies discussed in Session 2 really will set your firm apart from others and, if done well, will communicate clearly to your employees what matters culturally. These policies will stress not only legal concepts but also practical considerations to be considered inside of the law firm environment. Examples of these policies include electronic communications, appearance, workplace violence, etc.

Learning Objectives:

- Identify what policies really need to be included in your handbook based on individual firm needs.
- Discover practical ways to communicate important messages without sounding overbearing.

- Develop policies to communicate to your law firm employees what really matters inside of your firm.

12:15–12:30 p.m. Action Plan: Next Steps

Harassment

Law Firm Harassment Prevention and Correction

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m. Session 1: Understanding the Law and the Practical Impact of Harassment in the Workplace

Ripped from the headlines ... we've seen it everywhere — workplace harassment. Law firms are not immune. We all need to understand what the law says and truly appreciate the impact that harassment, discrimination and retaliation can have on our law firm environment. Regardless of the size of your firm, there are certain universal concepts to which your firm must adhere to avoid these issues. These concepts will be discussed in the context of a “quiz,” which practically and realistically covers all forms of harassment, not just sexual harassment.

Learning Objectives:

- Discuss the current state of the law regarding harassment, discrimination and retaliation.
- Identify common issues in the law firm environment which give rise to harassment claims.
- Discuss traps into which we fall regarding retaliation.

10:45–11 a.m. BREAK

11 a.m. –12:15 p.m. Session 2: The Practical Impact of Harassment and Legal Responsibilities of Law Firm Management

In addition to a continuation of the discussion of the law and a robust examination of inappropriate conduct, this section will focus on the “5 Rs” of law firm management responsibility:

1. **Refraining** from inappropriate behavior, broadly defined.
2. **Responding** proactively to inappropriate behavior, even in the absence of a complaint.
3. **Reporting** all complaints to human resources (or the appropriate designated person/people within the firm), even if the employee requests confidentiality and/or asks that nothing be done.
4. **Remediating** inappropriate behavior by focusing on inappropriateness, not illegality.
5. **Refraining from retaliation**, broadly defined.

12:15–12:30 p.m. Action Plan — Next Steps

Performance Management

Law Firm Performance Management: Yes, It Does Matter ... A LOT!

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m. Session 1: Documenting Discipline

We've said it to our law firm managers too many times to count: "Have you documented it?" Far too often, the answer is no. As we know, proper documentation is crucial for myriad employee relations issues. And when it comes to discrimination, retaliation and other wrongful discharge claims, legal liability often turns on the documentation. But it's not enough simply to document, document, document. Poor documentation is as dangerous as no documentation. The key is not only what you say but also how and when you say it.

Learning Objectives:

- Discuss why documenting discipline is so important.
- Examine the five key elements to any disciplinary document.
- Analyze common mistakes in drafting these critically important documents.

10:45–11 a.m. BREAK

11 a.m.–12:15 p.m. Session 2: The Law Firm Performance Appraisal Process

Now more than ever, letting your employees know how they are performing is one of the most important aspects of any manager's job. Whether the employee is doing a great job or needs significant improvement, it is critical that law firm managers know how to appropriately document the employee's performance and realize the importance of carefully drafting the appraisal. This section will explain why appraisals are important, describe the drafting process and identify common mistakes made in the drafting process. It also will identify the legal risks associated with a manager's rushed or poorly worded appraisal.

Learning Objectives:

- Analyze why performance appraisals are so important in the law firm environment.
- Examine ways to keep employees motivated and how performance appraisals are crucial to ensure that motivation.
- Analyze common mistakes in the performance appraisal process.

12:15–12:30 p.m. Action Plan — Next Steps

Legal Industry

Alternatives to Secretarial Support

Learning Objectives:

- Reverse the *accidental adversarial* relationship between legal secretaries and attorneys.
- Shift the attitude of your legal secretaries/assistants to create greater productivity and workability when using new models.
- Walk away with new tools and strategies to implement within your firm to hire, use and retain the legal secretary of the future.

WORKSHOP OUTLINE

Session 1: The Role of the Legal Secretary

- Begin by looking at the evolution of the role of the legal secretary who works in a variety of law firm sizes and assignments.
- Delve into the traditional model of a legal secretary and look at what works and does not work.
- Discuss the most effective way to use legal secretaries in the future.
- Compare and analyze the pros and cons of alternative secretarial models.
- Customize interview questions and criteria for hiring the legal secretary of the future.
- Overcome common obstacles that lose top legal secretaries when implementing new secretarial models.
- Design customized training and tools to enhance efficiency and productivity when using new models.

Training Format

- One 3.5-hour workshop
- Each training session would include 2.5 hours of training and 1 hour for a workshop, as well as questions.

Strategic Planning

HALF-DAY SAMPLE AGENDA

9-9:30 a.m.	Demographic and Economic Review Where are we and what does this mean? What are the common measurements?
9:30-10 a.m.	Governance and Management Firm management, leadership
10-10:45 a.m.	Defining Expectations Personal productivity, client development

10:45-11 a.m.	BREAK
11-11:45 a.m.	Defining Our Market Focus Markets, message, method, opportunities, follow-through
11:45 a.m.-12:15 p.m.	Recruiting of Laterals Do we need a lateral strategy?
12:15-1 p.m.	Next Steps Team update meeting, coaching program

FULL-DAY SAMPLE AGENDA

8:30-8:45 a.m.	Rules of Engagement Thinking like an owner
8:45-10:15 a.m.	Profit Is Not a Four-Letter Word Overhead burden, break-even and production expectations (45 minutes) Review profit per timekeeper for YTD (45 minutes)
10:15-10:30 a.m.	BREAK
10:30 a.m.-Noon	Compensation Is Not a Sacred Cow Identifying issues with current system (45 minutes) Options for improvement in incentives and rewards (45 minutes)
Noon-12:30 p.m.	LUNCH
12:30-1 p.m.	Welcome New Partners Review rules of engagement, welcoming exercise
1-2:30 p.m.	Culture Eats Strategy for Breakfast Assessment of alignment survey results (60 minutes) Confirmation and adjustment of culture values (30 minutes)
2:30-2:45 p.m.	BREAK
2:45-4 p.m.	Markets, Message, Methods Where do we get clients now? How do expand this? (45 minutes) Connecting firm and individual focus: What can we do better? (30 minutes)
4-4:30 p.m.	Next Steps Accountability

3-DAY SAMPLE AGENDA

- | | |
|--------------------|---|
| Thursday Afternoon | Sustained Adaptability |
| • 1:30-3 p.m. | Program introduction, leadership, handling growth and change, generation gaps |
| • 3-3:15 p.m. | BREAK |
| • 3:15-4 p.m. | Breakout Session 1: How do we define our growth options? |
| • 4-5 p.m. | Collect input and discuss growth options |
| Friday Morning | Strategic Planning |
| • 9-10:15 a.m. | Strategic focus: brand identity, lawyer development, practice groups |
| • 10:15-10:30 a.m. | BREAK |
| • 10:30-11:15 a.m. | Breakout Session 2: Do we need internal escalators to success? |
| • 11:15 a.m.-Noon | Collect input and discuss development plans, mentoring, skill training |
| Friday Afternoon | Practice Groups |
| • 1:30-2:30 p.m. | Practice group structure overview and why they are important |
| • 2:30-2:45 p.m. | BREAK |
| • 2:45-3:30 p.m. | Breakout Session 3: Practice groups: Should we focus or broaden our approach? |
| • 3:30-4:30 p.m. | Collect input and define practice group structure as a growth option |
| Saturday Morning | The One Firm Firm |
| • 9-10:30 a.m. | How we can become a “one firm firm” and what that will mean. |
| • 10:30-10:45 a.m. | BREAK |
| • 10:45 a.m.-Noon | Strategic planning process application and next steps |

Shareholders — Objectives, Obligations, Expectations

- | | |
|------------------|--|
| 9-9:15 a.m. | Rules of Engagement
Thinking like an owner |
| 9:15-10:30 a.m. | Firm Objectives
SWOT analysis: What it is, relevance to law firms, collect individual input (30 minutes)
Common ground: Where do we agree and what are the key items? (45 minutes) |
| 10:30-10:45 a.m. | BREAK |
| 10:45 a.m.-Noon | Leadership/Shareholder Obligations
Article (handout): Review and define the common obligations of shareholders (30 minutes)
Application to our firm: How do we see the application of these obligations at our firm? (45 minutes) |
| Noon-1:15 p.m. | LUNCH |

1:15-2:45 p.m.

Expectations

Subjective scorecard review (15 minutes)

Who scored what and why? (45 minutes)

Definitions and priorities (30 minutes)

2:45-3 p.m.

BREAK

3-4 p.m.

Accountability

How do we hold ourselves accountable? (30 minutes)

Who will do what by when? (30 minutes)

Business Development/Marketing

Growing Your Book of Business

Learning Objectives:

- Increase your revenue by 25 percent or more.
- Generate greater client satisfaction.
- Create your personal brand.
- Understand how to deal with challenging situations and people with ease.

TRAINING OUTLINE

Session 1: Growing Your Book of Business

- Identifying your brand
 - Exercise on how you are perceived
 - Are you more of a hunter or a farmer?
- Address various tips to increase efficiency in all types of personal and professional communication
 - Reading material and discussion of Four Agreements
 - Looking at areas on your team where you contribute and where you are stopped from contributing
 - Creating an empowering context in all communication
- Look at the top 10 ways to yourself indispensable to your clients
- Pre-screening questions to make sure the potential client is worth your time; learning when it is worth it to lose the business
- What to do when you get stumped
 - Role-playing challenging situations with clients
- How to close new business
- Being someone who people want to work with and refer people to
 - What is your “refer ability” factor?
- How to cold-call clients on LinkedIn and other resources
 - Scripts and conversations for success
- Learning to be a consultant to your clients
 - The tricks you need to know to be “client-oriented”
- Increasing your book of business
 - Daily declaration and statement of intent
 - Mentally preparing for success and intention setting

Training Format

- 3.5-hour workshop
- Each training would include 2.5 hours of training, as well as 1 hour for a workshop and for questions

Marketing Detailed Agenda

Business Development for Busy, Young Attorneys

More than ever before, young lawyers understand the importance of marketing and business development to their long-term career development. Most want to do it. They're just not sure what to do or how to get started. They're not sure how much time to invest. They often have unrealistic expectations about the results they might achieve as a young attorney.

Over the past several years, we've had fantastic response to marketing sessions designed especially for junior partners and associate attorneys. These sessions run from two hours to a half-day and have been approved for CLE credit in many jurisdictions. The handout material includes all the tools necessary for a busy attorney to create an Individual Marketing Plan — a plan that's realistic, achievable, consistent with firm goals and appropriate for practice.

And young lawyers love it! They leave with practical ideas and guidance to become an effective rainmaker. For example, we focus on the importance of niching and specialization, and developing good habits that will pay off over time. [Click here](#) to see an article we wrote, titled "How to Build and Maintain a Marketing and Sales Culture at Your Firm."

Learning Objectives:

- How clients find and select outside counsel
- Today's best practices in law firm marketing
- Practical tips for busy young attorneys
- How to develop your individual marketing plan
- The importance of sustainable, lifelong habits

- 9 a.m. **Introductions, Goals and Objectives**
Participants will provide self-introductions, including specific topics they want to cover during the session.
- 9:20 a.m. **How Clients Find and Select Outside Counsel**
An overview of recent studies regarding clients find and select outside counsel, with questions and answers along the way.
- 10 a.m. **Today's Best Practices in Law Firm Marketing and Business Development**
A presentation about what law firms are doing to attract and maintain desired clients, focusing on the most effective strategies and tactics.
- 10:30 a.m. **BREAK**
- 10:45 a.m. **Best Strategies and Tactics for Smaller and Midsize Law Firms**
Next, we drill down on those strategies that are most effective for smaller and midsize law firms, including client feedback programs, industry practice groups, organizational involvement, and individual business development plans.
- 11:30 a.m. **Practical Tips and Techniques for Busy Lawyers**

Recommendations on how to build effective business development habits into your busy work schedule. As with previous segments, the session is fast-paced and highly interactive.

Noon **Your Individual Business Development Plan**
We conclude the workshop by presenting a template and supporting materials for participants to create a personal marketing plan. Importantly, it should be specific, measurable, realistic and achievable.

12:30 p.m. **Adjournment**

ROI from Marketing on the Internet

How does a firm get noticed for its most important people and work? How can a law firm's content compete with the tens of millions of posts on social media today? Where is the best money invested for the greatest return? Where do your business development goals fit in — and how do they drive your strategy and result in new opportunities? This program will answer these questions and many more.

You'll hear the results of Content Pilot's recent study, *Global 50 Law Firm Websites: 10 Foundational Best Practices*, receive practical advice about content successes and website strategy/design, hear tips on search engine optimization (SEO), and review all-around best practices — all with the goal of winning your firm more profitable clients.

Learning Objectives:

- Identify how B2B buyers of legal services evaluate law firms online, the two buying stages they go through and more.
- Break down how to write website and social media content that will turn the heads of human readers and search engine robots.
- Identify what the world's largest law firms are doing online that's working — and not.
- Discuss how to build your next website with business development in mind and how to plan the right strategy and budget.

Law, Business Development and Technology

Everyone is suffering from “content discontent.” Law firm marketers and lawyers are scanning hundreds of articles, tweets and blog posts about content marketing but struggle to know how to shift to a new way of doing things in their law firms.

The answer? Start at the source — the clients, not the lawyers. Business development is exponentially more successful when lawyers understand how their clients buy legal services. How do they evaluate their firms? Where do they go to vet referrals from colleagues? What do they look for on law firm websites? Understanding this is critical before marketers invest in content and social media marketing, or a website redesign.

This program will help you understand how buyers buy and how you can better target your firm's marketing/business development content and investments to meet clients' requirements. Write smarter, more relevant practice/industry pages; write more compelling bios that truly distinguish your lawyers; and more. You will learn how you can make your most important content work harder — and walk away knowing the highest-opportunity online areas in which you can invest your marketing dollars.

Operations Management

Operations Excellence

Operational excellence means more than delivering quality legal services. The most successful law firms and legal departments are changing the way they deliver their legal services and the way they run their organizations.

This practical, hands-on workshop introduces you to an integrated approach to performance, profitability and innovation. Or, if you are in-house, to performance, productivity and innovation. Either way, you will learn where your organization sits on the PPI Maturity Model and how you can use Lean and process improvement as a foundation for key service delivery improvements.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

Learning Objectives:

- Understand operational excellence.
- Learn where they stand on the PPI Maturity Model.
- Learn how Lean can increase productivity, profitability and client service across the organization.
- Understand how integrating key initiatives in pricing, process, project management, legal tech, and more can drive improvements in operational excellence.

Who Should Attend?

This workshop is suitable for attorneys in private practice and in-house, para-professionals and senior law firm and legal department managers. Everyone will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

Detailed Agenda — approximately 3.5-hour workshop

What's Operational Excellence? (15 minutes)

- What does operational excellence really mean?
- What's driving the move to operational excellence? A look at trends in the legal market.
- Interactive exercise: What's Your Business Case for Change?

The Performance, Profitability and Innovation Maturity Model (15 minutes)

- Integrating your improvements: the PPI Maturity Model
- Breakout activity: Where Are You on the Maturity Model?

Building the Foundation for Operational Excellence (1 hour)

- Using a framework for improvement: DMAIC
- Understanding value and waste in operational processes
- Breakout activity: The Eight Wastes

- Establishing your baseline and choosing your metrics

BREAK (15 minutes)

Improving the Process (30 minutes)

- Using maps to visualize your process
- Setting up a mapping project
- What outcomes to expect: case studies on process improvement projects involving how attorneys practice, as well as projects targeting the business/administrative processes that support the practice of law.

Bringing It All Together (30 minutes)

- Moving along the maturity model from reacting to innovating
- Lean and process improvement as a foundation for innovation
- Breakout activity: Using Process Maps to Plan Your Innovations

Question and Answer Period (15 minutes)

Advanced Legal Process/Project Management

Lean in Law

Recent surveys on the state of the legal industry have all come to the same conclusion: in the years to come, the most successful attorneys will transform not just the way they deliver their legal services but the way they run their law firms and legal departments.

In this practical, hands-on workshop, you'll learn some of the key strategies of Lean and legal process improvement — strategies that can help you build a more efficient, productive, profitable and competitive practice. Or, if you are in-house, a more efficient, productive and effective practice.

We'll explore the Lean concepts of value and waste and show how to develop a set of improvement opportunities that you can start working on within your organization. We'll also teach you some easy ways to prioritize your improvement opportunities and give you a brief introduction to process mapping. You will leave the workshop with skills you can apply immediately and a set of issues that can serve as starting points for your improvement initiatives.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

Learning Objectives:

- Some key concepts on Lean and legal process improvement
- How to use Lean's eight wastes to develop a set of improvement opportunities
- How to prioritize potential improvements
- The basics of process mapping
- How to use a process mapping project to identify wastes and improve service delivery

Who Should Attend?

This workshop is suitable for lawyers and other legal professionals in law firms and in legal departments. Senior law firm and legal department managers, attorneys in private practice and in-house, and para-professionals will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

Detailed Agenda — approximately 3.5-hour workshop

Finding Time: Introducing Lean and Process Improvement (30 minutes)

- Icebreaker activity
- What's Lean and why should lawyers think about it?
- Who else is doing it? Case studies from law firms and legal departments across North America

Learning to See Your Work Differently (1 hour)

- Establishing a framework for improvement
- Looking at your work from the client's perspective
- Interactive Exercise: Who's Your Client?

- Understanding value and waste
- Breakout activity: The Eight Wastes

BREAK (15 minutes)

Putting the Tools to Work (30 minutes)

- Getting to the root cause of waste in law
- Interactive Exercise: Analyzing Problems with One Little Word
- Introducing PICK Charts and Kano's Model — two easy-to-use tools and how you can use them
- Interactive Exercise: Kano's Coffee Shop — applying the tools

Using Maps to Visualize and Improve Your Work (45 minutes)

- Selecting a process
- Setting up a mapping project
- Thinking about workflow, systems and technology
- Breakout activity: Working with Process Maps

Managing Change (15 minutes)

Question and Answer Period (15 minutes)

Process, Pricing and Project Management

This is not a survey course. It's a full-day, intensive, skills-building workshop designed specifically for those who want to grow their business or save their business. In either case, it's for people who want to grow their profits.

We've taught thousands of lawyers and legal professionals. We've worked in law firms and legal departments across the continent. We know what works and what doesn't. We've selected strategies and tools that we know you will be able to apply, and that will equip you to begin designing effective legal process improvement and project management initiatives.

We will tailor the workshop to meet the needs of your organization.

Learning Objectives:

- Learn how to integrate their process, pricing and project management initiatives.
- Acquire practical skills they can use the moment they walk out the door.
- Gain the knowledge to frame a conversation internally that will allow them to better structure their own improvement initiatives.

Who Should Attend?

- Lawyers who want to reduce write-downs and write-offs, deliver the services their clients need more effectively and compete more successfully in today's challenging legal market
- Business/administrative personnel who want to support practitioners and create a central hub of Lean and practice management expertise
- In-house counsel who struggle to meet the expectations of their internal clients, and the growing demands on their time and resources

Course Structure

- 6 hours of learning time and additional networking time during breaks and lunch
- Morning dedicated to process improvement, with activities designed around legal or business/administrative processes (depending on the audience)
- Afternoon dedicated to project management and pricing, building on and integrating with the skills developed in the morning session
- Every section includes hands-on activities, giving participants the opportunity to work with others and practice their skills
- Q&A session at the end for participants to ask for input/advice on specific initiatives

DETAILED AGENDA — Full-day workshop (all times are approximate)

9 a.m.–12:15 p.m.

Introduction (40 minutes)

1. Introductions/objectives
2. Positioning yourself for success in today's legal market
 - a. Where is the market today, and where is it going?
 - b. How can firms position themselves for the future?
3. Setting the stage for innovation
 - a. What is process improvement?
 - b. What is project management?
4. Moving up on the Legal Service Delivery Maturity Model
 - a. *Activity:* Where are you?
5. Adding value
 - a. What is the Client-Value Equation: benefit/cost/customer service?

Seven Steps to Success, Part 1

1. Identify a target process (30 minutes)
 - a. Selecting your starting point
 - b. Determining your selection criteria
 - c. Introducing the sample process
 - d. Understanding the client perspective
 - i. *Activity:* Who are your clients and what do they want?
 - e. Completing a project charter: building your business case and problem statement
 - i. Case studies
 - ii. *Activity:* What's the business case?

BREAK (15 minutes)

2. Map it (40 minutes)
 - a. Overview of value stream mapping
 - b. Overview of process mapping
 - i. *Activity:* Mapping the sample process
3. Optimize it (60 minutes)
 - a. Key Lean tools
 - i. DMAIC
 - ii. *Activity:* Eight wastes
 - iii. *Activity:* 5-why
 - iv. *Activity:* Pick & Kano
 - b. Applying the tools to the sample process
 - i. *Activity:* Developing the optimized process

12:15–1:15 p.m.

LUNCH

1:15–4:15 p.m.

Seven Steps to Success, Part 2

4. Scope it (45 minutes)
 - a. Scoping your matter for pricing and project management
 - b. Identifying resources
 - i. *Activity:* Who’s doing the work?
 - c. Setting clear assumptions
 - i. Consequences of mis-budgeting
 - ii. *Activity:* What’s in and what’s out?
 - d. Work breakdowns
 - i. *Activity:* Breaking down the work using your maps
5. Cost it (45 minutes)
 - a. Understanding revenue, realization and profitability
 - b. Reviewing typical pricing approaches
 - c. Costing a matter
 - i. What’s in and what’s out of the cost
 - ii. The importance of keeping
 - d. Using maps and works breakdowns to price a matter or process

BREAK (15 minutes)

6. Communicate it (15 minutes)
 - a. Communicating with clients
 - b. Communicating with members of your team
 - c. After-action reviews
7. Monitor it (20 minutes)
 - a. Developing your tracking metrics
 - i. Hours/tasks
 - b. Managing to your scope
 - i. Ensuring your team understands the scope
 - ii. Recognizing, capturing and communicating scope changes
 - c. Actively managing scope changes

- d. Selecting your monitoring tools
 - i. What's the minimum that you need?

Wrap-up (30 minutes)

Q&A session where participants can get advice on their own internal initiatives

Thinking Differently About Resource Allocation

In this workshop, you'll learn why innovation and change are difficult in our profession, and how a few simple changes can improve the success of your improvement initiatives. You'll also learn a new way of thinking about how you use the talent of your team.

In all our process improvement projects, our clients get significant benefits in productivity and profitability by reallocating work to the most appropriate resources. This practical, hands-on, half-day workshop will teach you how to think differently about change. We'll explore the Lean concepts of value and waste, using the efficient allocation of your resources as an example. You will never look at your work in the same way again.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

Learning Objectives:

- Learn why change is hard in our industry, and how one key shift in mindset can improve the chances of success.
- Learn to see their work through the Lean lens of value and waste.
- Learn how process maps can help find instances of unused talent (and more!).
- Practice using process maps to reallocate resources.
- Learn how to select a process and set up a mapping project.

This workshop is suitable for lawyers and other legal professionals in law firms and legal departments. Senior law firm and legal department managers, attorneys in private practice and in-house, and para-professionals will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

30 minutes	<p>What's Innovation ... and Why Is It So Hard?</p> <ol style="list-style-type: none"> 1. Icebreaker activity 2. What's innovation? 3. Why are innovation and change particularly hard in the legal industry? 4. How can you think differently to improve your chances of success?
60 minutes	<p>Learning to See Your Work Differently</p> <ol style="list-style-type: none"> 1. Looking at your work from the client's perspective 2. Understanding value and waste 3. <i>Breakout activity:</i> The Eight Wastes
15 minutes	<p>BREAK</p>

60 minutes	<p>Spotlight on the Waste of Non-Utilized Talent</p> <ol style="list-style-type: none"> 1. A deep dive into the benefits of getting the right person doing the right job at the right time 2. Case studies: A review of projects where reallocation led to significant benefits 3. How process maps help reallocate talent 4. <i>Breakout activity</i>: Using actual maps to identify non-utilized talent and reallocate resources
30 minutes	<p>Process Mapping to Find and Resolve Talent Wastes</p> <ol style="list-style-type: none"> 1. Selecting a process 2. Setting up a mapping project 3. What outcomes to expect
15 minutes	<p>Question-and-Answer Period</p>

Client Services

Learning Objectives:

- Increase your business by 15 percent or more annually.
- Generate greater client satisfaction and retention.
- Create your personal brand.
- Understand how to deal with challenging situations and people with ease.

Training Outline

Session 1: Exceptional Client Service

- Identifying your brand
- Pre-screening questions to make sure the client is worth your time and learning when it is worth it to lose the deal early
- Address various tips to increase efficiency in all types of personal and professional communication
- Being impeccable with your word/Having integrity
 - Managing expectations
- What to do when you get stumped ...
 - Role-playing challenging situations with clients
- Being someone who people want to work with and refer people to
 - What is your “referability” factor?
- Learning to be a consultant to your clients
 - The tricks you need to know to be client-oriented

Training Format

- 3.5-hour workshop
- Each training would include 2.5 hours of training, as well as 1 hour for a workshop and for questions

Technology

Why Purchase Legal Technology

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Beyond the Buy – Understanding Why

In a market full of options, versions, promises and preferences, how do legal professionals know which technology is critical to running an efficient and client-centric practice? This session will dive deep into five technologies that should find a place in your firm — but we will go beyond “you should buy this, it’s cool” advice and explore the *why* behind the technologies. From understanding why a legal specific time-billing and accounting program can help you stay compliant with the rules governing the management of client trust funds to how using document automation can minimize document errors, this session will provide you with real-world examples of the technologies that will improve your client service.

Learning Objectives:

- Explore why law firms and legal departments choose legal-specific technologies.
- Determine best practices for researching and selecting technologies.
- Review real-world examples of improvements made possible by leveraging the benefits from legal-specific technologies.

10–10:30 a.m. Technology Competency Activity

10:30–10:45 a.m. BREAK

10:45–11:30 a.m. Session 2: Risky Business – How to Avoid the Most Common Tech Mistakes

While technology is revolutionizing the way law firms and legal departments conduct their business, we often fail to recognize that technological benefits also come with technological risks. Misunderstanding the cloud, relying on paper in a paperless society, and leaving the people and process out of technology decisions are just a few of the major challenges faced in law firms and legal departments every day. This session will explore the Top 10 Tech Mistakes that plague legal professionals when they take on the technology they need to provide better client service and educate legal professionals on how to avoid the mistakes.

Learning Objectives:

- Explore recent technology advances and trends in law firms and legal departments.
- Analyze common mistakes in selecting legal technology.

Planning and Managing Your Technology

Isn't it time you took control of information technology (IT) within your organization? With IT being both a significant cost and a strategic expenditure, what can you do to manage ROI? What steps are available

to maximize the impact of technology, controlling costs where possible, while still benefiting from leveraging that technology to improve profits? How can you set reasonable budgets and manage your team and vendors to ensure that your technology is functioning as intended and on budget? What can we do to stay current enough on the options and conversant enough to speak with computer people?

Join us in this seminar to learn the best ways to plan and manage your team's technology. The program is specifically designed for the manager who does not have a technology background but is now charged with leading and managing the technology investment in a small to midsize organization, including law firms.

Learning Objectives:

- Identify the major cost components associated with technology.
- Plan budgets to acquire the necessary resources needed for success.
- Differentiate between various opportunities for leveraging cloud-based tools.
- Identify optimal software licensing strategies in an organization.
- Prepare and implement appropriate technology policies in a business.

Course Information:

- Prerequisites: Basic understanding of computer operations and terminology
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who manage technology investments and applications in small to midsize organizations

Technology Update

Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security and other technology-related issues? If you answered yes to any of these questions, then make plans now to invest four hours in this fast-paced, highly informative seminar that is sure to ramp up your return on technology investment.

The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software and services, as well as how to use these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

Learning Objectives:

- List and describe key features of Windows 10 and identify situations where upgrading might be advantageous.
- Analyze developments in mobile technologies and develop an optimal mobile strategy.
- Identify security issues facing business professionals and list options for mitigating risk.

- List and describe key features of Office 2016 and determine an optimal time to upgrade.
- Identify major trends in hardware, including desktops, laptops, servers, tablets, storage and printing.
- Develop strategies for successful cloud implementations, including document management, workflow, and data storage and synchronization applications.
- Define *virtualization* and identify how it potentially changes the technology infrastructure in your office.

Course Information:

- Prerequisites: Fundamental understanding of basic technology concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools and techniques

Technology Applications

Windows 10

Windows 10 has been available since 2015, yet most continue to use it as they used prior versions of Windows, ignoring many features that can be used to enhance productivity and security. In this session, you will learn the best-kept secrets of Windows 10, including how you can use it to minimize the threat of ransomware, integrate with your iOS- or Android-powered device, and how to use Timeline to track your activities for the most recent 30 days.

Learning Objectives:

- Identify options for managing the update frequency of a Windows 10-based PC.
- List at least five new features for improving productivity in Windows 10.
- Differentiate between key new features in Windows 10 for improving security.
- Identify the process for integrating a Windows 10-based PC with an iOS- or Android-powered device.

Course Information:

- Prerequisites: Fundamental knowledge of Windows operating systems
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve their proficiency with the Windows 10 operating system

Microsoft Office 365

9–9:50 a.m.

Taming the Inbox

Learning Objectives:

- Identify related messages quickly and easily using Conversation View.
- Create Quick Steps to automate routine, recurring processes.
- Employ drag-and-drop to create new appointments, tasks or contacts from email messages.
- Use folders and categories to organize messages.
- Apply rules to automate email processes.
- Describe how AutoArchive automates the process of cleaning the inbox.

Activities:

- Work through real-world examples of how to use Conversation View to quickly manage a thread of email messages.
- Create Quick Steps in Outlook to automatically perform specified tasks.
- Identify situations where drag-and-drop methodologies can be used to save time in Outlook.

- Create folder and categories and use them in tandem to become more organized.
- Build rules to automatically handle in bound email messages.
- Configure and manage Outlook’s AutoArchive.

9:50–10:30 a.m.

Tips for Excel Efficiency

Learning Objectives:

- Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special.
- Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting.

Activities:

- Work through real-world examples of taking advantage of various Excel features to improve efficiency and effectiveness when using Excel.
- Demonstrate why traditional methods of formatting data in Excel generally do not work well.
- Provide examples of how and why such features as the Accounting Format, custom formats, Styles, and Conditional Formats provide superior results.

10:30–10:40 a.m.

BREAK

10:40–11:40 a.m.

Reporting and Analyzing Data in Excel

Learning Objectives:

- Create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas and the ability to relate multiple tables together into a Data Model.
- Build PivotTables to efficiently and effectively analyze data.
- Use formula-based approaches involving SUBTOTAL and other functions to build reports and analyze data.

Activities:

- Convert an ordinary data range in Excel into a table and identify the primary advantages of working with a table of data.
- Build relationships between two tables to create a Data Model.
- Construct PivotTables to streamline the process of reporting and analyzing data.
- Build reports that use Excel formulae and functions to summarize data, including functions and features such as SUBTOTAL, EOMONTH, and Data Validation Lists.

11:40 a.m.–12:30 p.m. **The Best Features in Word**

Learning Objectives:

- Identify key features for entering, editing and formatting data, including Styles.
- Describe how to create and format tables.
- Define Quick Parts and Building Blocks and how to use them effectively.
- Describe how to integrate Word with Excel.

Activities:

- Illustrate how to use Styles and the benefits associated with using Styles to format a document.
- Provide examples of the utility of tables in Word, including the ability to use them as spreadsheets in a Word document.
- Create Quick Parts and Building Blocks and show how these tools can be used to save time.
- Build examples of integrating Word and Excel, including linking data from an Excel document into Word.

Office 365 — New Tools, New Tricks

Microsoft's Office 365 continues to evolve and has likely forever changed how many organizations approach licensing familiar Office applications. As part of the ever-changing nature of Office 365, Microsoft has added several new tools — including Flow and PowerApps — to the suite and has also added many new features to Excel, Word and other existing applications. Join us for this productivity-enhancing session in which you will learn about the new tools in Office 365 and how to improve your productivity by taking advantage of them.

Learning Objectives:

- Differentiate Office 365 from traditional licenses of Microsoft Office and identify the license option that is best for you and your organization.
- List the various update alternatives for Office 365 and determine which option is right for different team members and departments within your organization.
- Identify new tools in Office 365 and how they might be useful to you or others in your organization.
- Use new features in Office 365 applications to optimize productivity.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to take full advantage of the products and services offered under Office 365 subscriptions

Excel Best Practices

As spreadsheets continue to evolve, so too must your practices for creating, editing and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel and reporting on data contained in Excel.

Today's best practices for Excel differ significantly from those used in the past. Course materials include relevant examples to enhance your learning experience. Participate in this program to help ensure that you use Excel to its fullest potential.

This course covers features found in Excel versions 2007 and newer.

Learning Objectives:

- List critical spreadsheet design fundamentals.
- Identify techniques used to minimize data input errors.
- Use Excel's Table feature as a foundational component of spreadsheets.
- Identify and implement three different techniques for consolidating data.
- Use various Excel features, such as Go To Special to solve specific spreadsheet issues.
- List and apply four techniques for sharing an Excel workbook and collaborating with others.
- Implement various techniques for auditing and error-checking Excel workbooks, including Trace Precedents, Trace Dependents and Formula Auditing.
- Identify the advantages of working with Defined Names in Excel.
- List and apply six techniques for securing Excel data.

Course Information:

- Prerequisites: Fundamental knowledge of Microsoft Office Excel 2007 or newer
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Excel users who want to learn best practices for working with spreadsheets. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Excel Tips, Tricks and Techniques

Excel is the business professional's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. You will learn tips, tricks and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking

Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.

Throughout the program, your instructor will reinforce key learning points with practical, real-world examples that will improve your understanding and comprehension of the topics presented. This highly acclaimed course draws on more than 25 years of experience in delivering spreadsheet training to business professionals, which assures you of the relevance and usefulness of the information and guidance provided during the program.

Learning Objectives:

- Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard and Paste Special.
- Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats and Conditional Formatting.
- Use various formula-building tools to create formulas more efficiently and create various types of formulas, including formulas that manipulate text and dates, contain VLOOKUP and HLOOKUP functions, contain conditional calculations or contain circular references.
- Link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports.

Course Information:

- Prerequisites: Fundamental knowledge of Microsoft Office Excel 2007 or newer
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who want to learn how to use Excel more efficiently and effectively. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Microsoft Power BI — Power Reporting for Free

Power BI, available as a free desktop solution, can revolutionize your reporting processes. The free tool is packed full of features found in solutions that cost thousands of dollars per year. This session will take you on a guided tour of importing data, organizing data, choosing visuals and building a simple report. You will also learn how you can leverage the desktop solution by publishing your reports to the paid Power BI Pro service. This is not rocket science — it is Power BI!

Learning Objectives:

- Identify key differences between the cloud version and desktop version of Power BI.
- Apply the knowledge gained to integrate Excel data into Power BI.
- Use built-in query tools in Power BI to search for data.
- Create compelling and interactive visualizations to build financial and operational dashboards.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve financial reporting processes

Microsoft's Power Business Intelligence Tools

In today's business climate, business intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out-of-reach just a few short years ago. A growing array of tools — ranging from Excel add-ins to dedicated solutions such as Power BI — now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently.

In this program, you will learn how to implement “do-it-yourself business intelligence” using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards, and then you will learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools.

Learning Objectives:

- List the potential shortcomings of BI solutions based wholly on Excel.
- Identify and implement various Excel add-ins that might useful in BI applications.
- Differentiate between the BI opportunities in Excel and Power BI.
- Create and distribute dashboards using Power BI.

Course Information:

- Prerequisites: Basic understanding of computer operations and terminology, including Microsoft Office Excel
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals seeking to develop and implement BI solutions

Cleaning Data with Excel, Power Query and Power BI

While there are a wide range of ways to analyze data, one must first retrieve, scrub and organize data effectively before any of those techniques can be used. This session will help users understand and utilize end-user data retrieval tools like Microsoft Power Query as well as content packs for Microsoft Power BI to connect, retrieve, reorganize and create scripts to automatically reformat data of all kinds from a wide variety of sources. Attend this session and learn to use these powerful tools to solve and automate your data extraction and transformation processes.

Learning Objectives:

- Define the major components included in Microsoft Power Query and Power BI Content Packs.
- Explain how Power Query fits into the Microsoft self-service business intelligence ecosystem (Power Query, Power Map, Power Pivot, Power View and Power BI).
- List the types of data sources that can be accessed using Power Query, Power Pivot and Power BI Content Packs.
- Describe how Power Query transformations can be used to reformat, combine and rearrange data retrieved from a wide range of sources.
- Explain how Power BI and the Excel Data Model provide ways to use this data to create effective reports.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to query data from external data sources into Excel and Power BI for analytical purposes. This program focuses on Excel for Windows.

Advanced Excel

If you are an experienced Excel user seeking to elevate your skills, join this laptop-friendly program. You will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks, 2) using tables to analyze and report data, 3) integrating and manipulating data from external sources, 4) creating and auditing complex formulas, 5) advanced data analysis tools and 6) visualization techniques to analyze and communicate information.

The content of this course draws from more than 25 years of experience in delivering Excel training to other business professionals; throughout the program, relevant, real-world examples reinforce the major topics presented. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

Learning Objectives:

- Identify and implement the best techniques to secure sensitive information in Excel workbooks and collaborate with other users to improve accuracy and efficiency.
- Create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas and the ability to relate multiple tables together into a Data Model.
- Import and link data into Excel from external sources — including text, Access and SQL Server — and use advanced tools, such as Power Query and various cleanup tools, to manipulate the data to meet specific needs.
- Use advanced functions — such as SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, XNPV and XIRR — to create and audit complex formulas.

- Analyze worksheet data using techniques such as Data Tables, Subtotals, Slicers, Filters and PivotTables.
- Describe techniques used to create, manipulate and customize charts for analyzing and communicating information.

Course Information:

- Prerequisites: Experienced Excel user
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who work with Excel 2007 or newer and want to extend their knowledge with advanced features and functions. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Advanced Excel Reporting

This program will help you build advanced Excel reports, including reports where the source data resides in your accounting software or another database. In this seminar, you will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, group PivotTable data into fiscal reporting periods and filter your PivotTables using Slicers.

You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, as well as how to use Excel add-ins such as Microsoft’s Power Pivot to streamline and automate many of the manual processes associated with building Excel-based reports.

Many business professionals spend far too much time in Excel accessing and converting financial data into useful reports. If there is the chance you may not be taking full advantage of all that Excel has to offer as a reporting tool, then you should make plans to participate in this program.

Learning Objectives:

- Link and import data from external databases — including multi-table databases — into Excel.
- Use Tables and PivotTables to create accurate financial reports and analyses.
- List and apply Excel shortcuts for formatting financial reports.
- Identify opportunities to work with third-party tools to streamline reporting in Excel.

Course Information:

- Prerequisites: Strong working knowledge of Excel 2007 or newer
- Program level: Advanced
- Advance preparation: None

- Who should participate: Business professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes and improve the quality of reports. The program focuses on Excel for Windows, but some of the features can be found in Excel for Mac.

Advanced Excel Functions — and Formulas

Excel has more than 450 functions, many of which are unused by business professionals. This session will put you on a path to improved Excel productivity by introducing you to powerful but little-used Excel functions, such as IFS (for nested IF statements), AGGREGATE (best described as SUBTOTAL on steroids), GETPIVOTDATA (for producing formal reports from data summarized in a pivot table), CUBEVALUE (for building reports directly from the Excel Data Model) or TEXTJOIN (for joining text or creating CSV files quickly and easily).

Learning Objectives:

- Use Excel's financial functions to calculate mortgage interest and principal reduction or perform conventional cash-flow analysis.
- List five Excel functions for making conditional calculations with multiple conditions.
- Explain the general process of using INDIRECT to make report assembly easier.
- Describe the benefits of using GETPIVOTDATA for extracting summarized data from a PivotTable.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who are seeking to maximize the functionality of Excel by using advanced functions and formulas. This program focuses on Excel for Windows.

Excel with Useful Add-Ins

There are many free or low-cost add-ins available to overcome the limitations of Excel. For example, the free Fuzzy Lookup add-in from Microsoft allows users to match inexact data. Ever try that with VLOOKUP? RiskAMP allows users to perform Monte Carlo simulations for capital budgeting; ActiveData provides users with the means to do sophisticated Benford Analysis and other CAATS techniques; and the Analysis ToolPak provides a full range of statistical analyses useful in budgeting and forecasting. This session will identify and demonstrate useful add-ins to improve Excel functionality and your productivity.

Learning Objectives:

- Identify five useful add-ins to extend the power and functionality of Excel.
- Use the Fuzzy Lookup add-in to match inexact data.
- Explain Benford Analysis and why it is useful in fraud detection.
- Perform linear regression using the Analysis ToolPak.

- Describe the process of performing a Monte Carlo simulation on cash-flow data.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to maximize the functionality of Excel by using add-in tools. This program focuses on Excel for Windows.

Excel Pivot Tables

PivotTables are widely considered the most powerful feature in Excel, yet most business professionals do not use them in their day-to-day activities. In this program, you will learn how to build PivotTables, how to group data inside PivotTables — including grouping options for fiscal periods — and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot.

If you have been leery of working with PivotTables or have struggled to realize their many benefits, this course is for you. With a little information, guidance and coaching from the instructor, you will be ready to use PivotTables to analyze and report on very large data sets in a fraction of the time you are spending presently to complete such tasks.

Learning Objectives:

- Identify the six main elements of a PivotTable report and their use when creating PivotTables.
- Create PivotTables and manipulate data in PivotTables using grouping techniques, modified Field Settings, user-defined calculations and sorting and filtering options.
- Import and link data from external data sources into PivotTables, and use Tables and Data Models as data sources for PivotTables.
- Analyze data in PivotTables using tools and techniques, such as sorting, filtering, Excel's GETPIVOTDATA function and PivotCharts.
- Apply specific PivotTable techniques to solve problems in areas of PivotTable formatting, creating multiple PivotTables from a single data source, grouping PivotTable data into fiscal reporting periods and keeping PivotTable row order intact.

Course Information:

- Prerequisites: Fundamental understanding of Microsoft Office Excel 2007 or newer
- Program level: Advanced
- Advance preparation: None

- Who should participate: Professionals who want to use the power of Excel PivotTables to analyze and summarize data. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Data Analysis with Power Pivot

With Power Pivot, your PivotTable reports become even more powerful. Power Pivot can connect directly to many common external data sources or can be used in conjunction with Power Query for superior data import and transformation capability. DAX functions allow users to create sophisticated calculations — both columns and measures — and the relational functionality of Power Pivot provides all the tools necessary for creating an intermediary database from multiple data sources. Put Power Pivot to use immediately by participating in this practical session, which will help you improve your analytical and reporting processes.

Learning Objectives:

- Differentiate between ordinary PivotTables and those created with Power Pivot.
- Describe the advantages of working with Power Pivot.
- Explain the procedure for building a PivotTable using Power Pivot.
- Define data models, data analysis expressions and key performance indicators.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel, including creating PivotTables
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve financial analysis processes by taking advantage of the Power Pivot feature found in Windows-based versions of Excel

Excel Data Models, Combinations and Consolidations

Combining and linking data from multiple tables, sheets and workbooks is a daily need for many business professionals, yet many do not fully appreciate the breadth of Excel options available for accomplishing this task. In this session, you will learn about the full range of Excel data consolidation functionality, including simple sum-through formulas, auto-merging workbooks, consolidation PivotTables and linking tables to create powerful Data Models. Simplify and streamline your data consolidation processes, improve your personal productivity and reduce errors with the information contained in this feature-packed session.

Learning Objectives:

- Differentiate between various formula-based approaches to consolidating data.
- Implement dummy end-point worksheets or columns to simplify the data consolidation process and reduce errors.
- Differentiate between using Data Consolidation by position and by category.

- Use consolidation PivotTables to combine data from multiple worksheets or workbooks.
- Create a Data Model by linking multiple tables of data and then build powerful PivotTable analyses from the Data Model.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to harness the power of array formulas to perform calculations in Excel. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Mastering the Excel Data Model

The Excel Data Model is an in-memory multidimensional (OLAP) data engine available in all versions of Excel 2013 and 2016. The Data Model is the core foundation of Power Pivot. With the Data Model, users can 1) relate multiple Excel tables, 2) build PivotTables on multiple data sources, 3) import data from external data sources and 4) analyze PivotTable reports using Quick Explore, which allows users to drill up, down and around in reports. This session will provide the knowledge and skill necessary to take full advantage of the Excel Data Model.

Learning Objectives:

- Describe the Excel Data Model.
- List the advantages of using the Data Model as a PivotTable data source.
- Create PivotTables from data stored in multiple related Tables.
- Describe the process of relating Tables in Excel 2013 and 2016.
- Explain the process of connecting to external data sources.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to take advantage of Excel's Data Model feature. This course focuses on features found in the Windows-based version of Excel.

Excel Tools for Better Budgets

Excel is the de facto budgeting and forecasting tool for most professionals, yet many who use Excel do not take advantage of the numerous built-in tools available. Among other topics in this session, you will learn how to work with Excel features such as FORECAST, FORECAST.ETS, TREND, Forecast Sheets, XNPV

and XIRR. Additionally, you will learn better ways to manage what-if analysis using Scenario Manager and Solver, as well as the value of performing Monte Carlo simulations.

Learning Objectives:

- List key budgeting and forecasting features in Excel.
- Differentiate between Excel's capital budgeting functions.
- Use Scenario Manager to manage different sets of budget assumptions.
- Solve complex, multi-variable equations with Excel's Solver add-in.
- Create Monte Carlo simulations to model risk in budgets and forecasts.

Course Information:

- Prerequisites: Fundamental knowledge of budgeting and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become more efficient and effective in budgeting processes. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Excel Financial Modeling

Excel remains the tool of choice for many business professionals when building financial models, including forecasted financial statements and budgets. Yet many of these same professionals have never received any formal training how the best practices associated with generating these types of spreadsheets. By participating in this session, you will learn many amazing techniques that will not only help you to save valuable time when building Excel-based models but also improve the quality of your results.

Learning Objectives:

- Identify 10 best practices for creating financial models in Excel.
- Use Excel features and add-in services for sensitivity, trend and discounted cash-flow analyses.
- Create optimization models using Excel's Solver tool.
- Implement procedures for eliminating errors in Excel-based financial models.
- Incorporate various formatting techniques to improve the usefulness of reports.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to utilize the Windows-based version of Excel more efficiently and effectively when creating financial models, plans, and analyses

Word Tips and Tricks

Like most Microsoft Word users, you can get through the basics of creating a document and applying some formatting characteristics. But do you use Word Styles or Quick Parts? Do you know how to generate a Table of Contents automatically from a document? Can you insert Excel-like formulas into Word Tables? If your answer to any one of these questions is no, then don't miss this opportunity to improve your knowledge, skill and productivity in using Microsoft Word.

Learning Objectives:

- Identify key features for entering, editing and formatting data, including Styles.
- Describe how to create and format Tables.
- Use the Navigation Pane to navigate or rearrange a document quickly and easily.
- Define Quick Parts and Building Blocks and how to use them effectively.
- Describe how to communicate better with charts, SmartArt and screenshots.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Word
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to use the Windows-based version of Microsoft Word more efficiently and effectively

Top PDF Features

Stop struggling with PDFs! Using Adobe Acrobat and other PDF tools provides access to several features that make working with these common files a breeze. In this course, you will learn how to use tools and features — such as PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogs, portfolios, and securing PDF documents — to their fullest to work more effectively and efficiently with PDF documents.

The popularity and usefulness of PDFs increases daily, but most PDF users have not learned how to manipulate PDF documents effectively. Instead of struggling and straining with these very common files, join us in this program to learn the top features necessary to optimize your work with PDF documents.

Learning Objectives:

- Reorganize and manipulate PDF documents — including applying bookmarks — to meet specific needs.
- Create and distribute PDF forms and automate the process of collecting and summarizing form response data.
- Mark up and edit PDF documents and apply tick marks.
- Secure PDF documents and facilitate electronic approvals and signatures.
- Convert PDF documents to Word and Excel files.

Course Information:

- Prerequisites: Fundamental knowledge of basic PDF operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become more efficient and effective when working with PDF documents

Personal Technologies

Technology impacts us not only in our personal lives but also in our business lives. Complicating matters, it sometimes can be difficult to distinguish between the two. In this session, you will learn about many of the technologies that can help you at home and the office so that you can be more efficient and effective. Examples of tools discussed in this session include personal hardware, apps, speech-to-text, notetaking tools and audio-visual technologies.

Learning Objectives:

- Identify key hardware options for improved productivity.
- List examples of how to securely synchronize data.
- Identify how audio-visual technologies are an important consideration in today's business climate.
- List example of apps that can have a positive impact at both a personal and a professional level.

Course Information:

- Prerequisites: Fundamental knowledge of basic technological concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to identify new and emerging technologies to solve everyday issues

Security

Security — A Practical Guide

It's not a matter of *if* you will have a security incident, but *when*. Learn the steps you can take to protect yourself. This course will cover multifactor authentication, password managers, encryption, mobile device management, anti-virus, firewalls, policies, tools and other techniques that you can apply immediately. Spending more does not make you more secure. Doing the right things can. Are you doing the right things to be secure?

Learning Objectives:

- List three tools that enhance security.
- Describe the security risk environment.
- Specify a business case for security training.
- Name a tool that enhances security and reduces risk.

Course Information:

- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to enhance the security surrounding both personal and organizational data

Securing Your Data

Security is not optional, and yesterday's security techniques are not working to minimize today's threats. Therefore, now is the time for you to tune up what you know about protecting sensitive data. In this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication and more. You will also learn how to implement a practical, five-step approach for securing your PC and the types of questions you should be asking of your staff to ensure server-based information remains protected. Extensive demonstrations will be used to teach the techniques and concepts presented.

Security failures, such as a breach of client or customer data, are costly — they can even drive your company out of business. What are the security tools you need, and how do you use them to secure your sensitive data and systems? Participate in this program to learn how you can implement viable and practical solutions to mitigating today's security threats.

Learning Objectives:

- Assess the relevant security risks in your organization.
- Identify specific tools and techniques to protect sensitive data.
- List five specific steps to improve PC security.

- Implement security procedures to improve organizational security.

Course Information:

- Prerequisites: Basic understanding of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals seeking to secure sensitive data

Password Management and Loss Prevention

Data loss prevention (DLP) is a means of creating and enforcing security policies in an organization. For example, with DLP, you can create rules that programmatically block all outbound email messages containing information such as Social Security or credit card numbers. Unfortunately, most business professionals have yet to discover DLP and how it improves security. Likewise, most business professionals have yet to discover and implement password management tools, which are all but a necessity when attempting to enhance personal and organizational security.

In this session, you will learn the fundamentals of DLP and password management tools and, through demonstrations, see how you can use DLP and password management tools to enhance organizational security.

Learning Objectives:

- Define data loss prevention and list examples of how it can enhance organizational security.
- List examples of tools and services available that support DLP.
- Identify the process for creating DLP rules in common tools, such as Excel and Exchange Online.
- List the key characteristics of “long-and-strong” passwords.
- Differentiate between leading password management tools.
- Identify alternatives to passwords to improve authentication controls.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become enhance the security and privacy of sensitive data

Spam, Virus and Malware Protection

Bad actors want inside your systems and want to steal your data. They can attack your systems directly or use your email inbox. This session explains the protection options for spam, virus and malware. Top tools and techniques will be discussed with multiple solutions discussed in each area.

Learning Objectives:

- Identify threats that need protection.
- Differentiate the most effective protection methods.
- List the protection options that you can use.
- Apply the knowledge to protect your systems.

Course Information:

- Prerequisites: Fundamental knowledge of computer operations and security needs
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to increase the security of sensitive and critical data

Ransomware — Reducing Your Risk

Ransomware, which plagues individuals and businesses of all sizes and in all industries, represents one of the biggest security threats we face today. Yet few are taking the steps necessary to reduce the risk associated with the potential loss of data or breach of confidential information associated with ransomware. In this course, you will learn how you can implement an effective system of control to mitigate the risk.

Imagine turning on your computer one day to find that all your data files have been encrypted and a criminal holds the key necessary for you to regain access. This is a classic ransomware scenario — one that affects hundreds of thousands of computers each year. Learn the best practices for reducing the chances that your data is held hostage, as well as key recovery tactics in the event that your preventive efforts fail.

Learning Objectives:

- Define ransomware and identify the risks it poses to you professionally and personally.
- List the top methods by which ransomware infects an individual computer or a network.
- Implement control methods to help reduce your risk of becoming another victim of ransomware.

Course Information:

- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to reduce the risk of losing data in a ransomware attack

True Tech Crimes

Security is a top concern for business professionals, yet many hacks result from the failure of organizations to implement effective internal controls over information technology. This session will teach you about critical IT-related controls in a case-study approach using examples from recent breaches and security failures to help you better understand how to protect your company and its data.

Attend this fast-paced session and learn more about IT-related controls, which can be used to prevent computer crimes such as unauthorized access, theft of information, identity theft, data exfiltration, tax refund fraud and more.

Learning Objectives:

- List at least three major security incidents reported in the headlines in the last two years, and explain at least one major control design or operation flaws which allowed the hack to occur.
- Define the three factors used to authenticate someone to a system, and explain why two-factor authentication is preferable to one-factor authentication.
- Explain why home-grade computer hardware and applications are inherently less secure than business- and enterprise-grade hardware and applications.
- List at least three best practices learned as a result of reviewing the incidents cited in the case studies.

Course Information:

- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to enhance the security surrounding both personal and organizational data