



The Professional Development Institute

Skills and Tools Helping Achievers Forge Excellent Careers

Update

2012

New Seminar: Project Management, Page 2

First Hands-on Workshop (3 days) of a Complete 5-day Program (see page 8 for Advanced Workshop)

New Manager & Team-Leader Workshop

Mastering the Skills, Techniques & Tools

Ottawa-Gatineau: March 14-16, 2012 May 28-30, 2012



Important: This 3-day program is in high demand. Please register early to attend the session of your choice.

This intensive workshop focuses on what works in real life. Whether you are new or aspiring to management, we want you to excel in the difficult transition to team leader and manager. You'll take home the skills, know-how and tools to get the very best of every employee, and make a real difference in the effectiveness and productivity of your team. You will learn to set and accomplish goals, coach, delegate and motivate, review performance, communicate, manage difficult relationships and give feedback including unpleasant news without impairing self-esteem ... and much more.

HANDS-ON WORKSHOP BENEFITS

At the end of this workshop, you will acquire the proven skills to attract, empower, reward and retain talent, get commitment to a shared vision, delegate, bring out the best in others and lead your team to success. You will learn to recognize true priorities; assume responsibility and accountability; manage risks; resolve problems and conflicts; value diversity; build a culture based on trust and mutual respect; inspire; mentor and act as a role model for others. You will take home new ideas, proven tools and sound timesaving skills, most of which are unavailable elsewhere.

DETAILED OUTLINE - 3 DAYS - 2.75 CEU

1. Neglected Issues in Managing and Leading Teams

- Fundamental drivers of good decisions and policies
- How to validate goals and prevent errors
- Practical team exercise and interactive feedback
- Setting priority and urgency: Theory and best practices
- How to lead without the benefit of authority
- How to get and apply collaborative power and other constructive instruments of influence and control

2. Profession Team Builder: Key Success Factors

- Beyond situational leadership: Caring and acting with a conscience, competence, commitment and courage
- Leadership knowledge (not necessarily diplomas)
- Key interpersonal skills; behavior of strong leaders
- Essential team-building and management skills

3. Prepare Your Team to Succeed Beyond Measure

- Team and leader roles: 6 keys to compatibility
- Exercise: Charting responsibility and accountability
- How to assign clear roles and prevent serious conflicts
- How to reduce usual delays in getting approvals

4. How to Motivate, Delegate and Empower Teams

- The best practices and theories: Schein, Katz et al
- Motivating former peers, newcomers and old hands
- How to delegate, empower, control and get results
- Practical lessons from high-achieving team leaders

5. Management of Change for Top Performance

- What should change and in what sequence
- Changing attitudes and behavior: Do's and don'ts

6. How to Conduct 360° Performance Reviews

- Two exercises: Sensitive performance reviews
- Practical tips for successful review meetings
- How to praise, reward, and share negative feedback
- Managing nine staff reactions: Current best practices

7. Conflict Prevention, Diagnosis and Resolution

- How to discuss complaints with employees
- Conflict diagnosis and resolution road map

8. Managing Difficult and Hostile People

- Film and teamwork: Dealing with constantly difficult people who are passive, resistant or openly hostile
- How to nurture the misguided to take the high road
- How to firmly discipline without adverse effects

9. Managing Time and Organizing Your Team

- How to set priorities and schedule your week and day
- How to get and stay organized: Practical tools & tips
- Managing interruptions: Demonstration and practice
- 25 tips to effective e-mails and higher productivity

10. Inspiring Models of Exemplary Team Leaders

- Team players/trailblazers: Kendal, Mullane, Mullaly

11. Exercises, Teamwork, Synthesis and Conclusion

"World class seminar covering a broad range of topics in coherent, organized presentation of value to anyone working in/or considering a career in management. Bravo!"

David Easton, Budget Manager, R.C.M.P.

"This is one of the best training courses I ever took. The practical cases, examples and skills of this program will help me improve the performance of my team and mine."

A. Hernandez, Engineering Manager, Avery Dennison

Tuition Fees: 3-day seminar: Regular fees \$1295; Government: \$1245; Group fees for 3 or more: \$1195 each

5-day program (includes Advanced Workshop, page 9): Regular \$2190; Govt.: \$2090; Group of 3 or more: \$1990 each

☎ Toll Free: 1-800-HARVARD. Local Call in Ottawa/Gatineau: (819) 772-7777.

www.executive.org

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Project Management

Based on PMI Framework. Delivered by Dr. Stewart, PMP

Ottawa-Gatineau: March 19-21, 2012

New Seminar

April 23-25, 2012



The Professional Development Institute is a Project Management Institute (PMI)® Registered Education Provider

WORKSHOP OBJECTIVES

This unique workshop provides project team members and project managers with a grounding in important project management principles, tools and techniques. By the end of the session, you will be able to scope and visualize a project, define goals, document, develop a work breakdown structure, schedule, budget, allocate resources, implement and close your project.

The focus is on the proven principles that permit you to concentrate on the unique aspects of your project. The content is based on the framework and standards of the Project Management Institute, applied worldwide.

PROGRAM LEADER: BILL STEWART, Ph.D.

Dr. Bill Stewart is a PMI certified Project Management Professional (PMP) with considerable experience in management, systems integration, and systems engineering. During his 12 years in advanced system integration at Lockheed Martin, he served as systems and software manager, directed a \$20M technology integration project and a \$14M health-systems integration project. Bill was also system-engineering manager for a \$3B helicopter-integration project. He managed the development of the most advanced tactical information-fusion system in the NATO alliance, where he gained extensive knowledge of secure systems. He also established and managed the first Canadian Forces base computing centre, where he built and deployed base-wide solutions to:

- Optimize resource management and course scheduling
- Safely manage firing range allocation
- Provide custom personnel and payroll solutions.

Bill received a Ph.D. in Computer Science from the University of New Brunswick in 1992. His professional training with Lockheed includes executive leadership, project management, system engineering and requirements analysis.

DETAILED OUTLINE - 3 DAYS - 21 P.D.U.

1. Project Management Overview

- The key causes of project success and failure
- The standards body - Project Management Institute
- The five main phases in a project life cycle
- The nine project management knowledge areas
- Proper project relationship to the Strategic Plan
- Your project steering wheel – the triple constraints
- Basic attributes of a good project manager

2. Project Initiation

- The project charter – starting a project right
- The foundation of a project – the objectives
- Justifying the project with the business case
- Stakeholders, obtaining their commitment early
- Project boundaries – assumptions & constraints

3. Project Planning

- The top-level flow of the planning process
- The first step – build a work breakdown structure
- Cost and time estimating – tips and techniques
- How to build and roll-up the total project budget
- Your real management tool – the network diagram
- The key to schedule – building the critical path
- From the network diagram to the timeline (schedule)
- Human resources and resource leveling
- Positive and negative risks, building a risk-proof budget
- The project management plan as the baseline

4. Project Execution

- The P.M.'s leadership and team-motivation roles
- Building a team – skills, energy, team temperament
- Organization structures – functional, project and matrix
- The leader's job – "what" not "how"; full delegation
- The kick-off meeting, getting everyone aligned
- Communication: verbal, meetings, email, invisible web
- The foundation : weekly meeting and issues list
- Design before build : start cheaply, then spend
- When to build internally, when to buy externally
- Procurement: contract types, selecting the winner
- Project quality: ensuring the output is "fit for use"

5. Project Monitoring and Control

- Managing expectations and change
- Monitoring tempo, what to do when off plan
- Comparing the baseline to the current schedule
- Critical chain management, optimizing schedule
- Compressing schedule: crashing and fast-tracking
- Tracking, gaging the status, and managing project cost
- Managing risk: tempo, triggers, and contingency
- Earned value, measuring schedule by work done
- Project evaluations: reports, asking for assistance
- Closure: scope verification, system delivery

6. Project Closeout Phase: Planning and Completion

- The closure plan and meeting: PM and client roles
- Reconciliation and disposition of outstanding items
- Transition and feedback for the team
- Lessons learned: the most valuable step
- Personal closeout: dealing with mistakes

7. Synthesis & Conclusion

Tuition Fees	Regular fees	Govern-ment	Groups of 3 or more
Project Management Part I (3 days, page 2):	\$1295	\$1245	\$1195 each
Adv. Seminar (5 days, page 3):	\$2295	\$2220	\$2145 each
Complete 8-day program:	\$3400	\$3300	\$3200 each
Registration info: page 9			

The PMI Registered Education Provider logo is a registered mark of the Project Management Institute, Inc.

Advanced Project and Risk-Management Skills using Harvard University Global System™ Tools

Ottawa-Gatineau: June 11-15, 2012 September 24-28, 2012



This advanced workshop provides you with cutting-edge leadership competencies, practical tools and technical skills to select and define complex projects; validate scope; negotiate a clear mandate and forge lasting agreements with stakeholders; manage risks; formulate a solid strategy and action plan; prevent role conflicts and control progress. You will also acquire the best practices to build effective teams; retain talent and allies, allocate scarce resources, budget; estimate time; control change; recognize early warning signs of delays and cost overruns; and deliver excellent results (scope, quality, time, cost, net value) or seek a graceful exit, when it is in the client's best interest.

DETAILED OUTLINE - 5 DAYS - 4 CEU

1. Tools to Select, Scope and Customize Projects

- Project-portfolio selection and priority-setting tips
- Four tests to discard projects with questionable value

2. Project Strategy and Deliverables: Best Practices

- Harvard® Brainstorming Tool: Out-of-the-box choices
- Translating project strategy into sound deliverables

3. How to Identify and Quantify Serious Risks

- Early indicators for risk incubation: Practical lessons
- Value-chain risks, blind spots and gray areas
- Stakeholder risks: Understanding supporters and blockers with psychographics and Factional Analysis
- Responsibility and accountability risks: Harvard® tools
- Execution, transition and commissioning risks
- Demonstration: Monte-Carlo simulation of risk

4. Mitigating Risks & Dealing with Residual Risks

- Risk tolerance: Beyond the precautionary principle
- Risk response and communication: Practical skills
- Practical case study: Continuous risk management

5. Essential People Skills and Team Competencies

- Proven ways to empower talent and build allies
- How to lead your team without the benefit of authority

6. How to Lead and Prevent Veto and Role Conflicts

- How to assign responsibility: Exercise and teamwork
- Integrating responsibility, accountability and authority

7. Preparing for Project Negotiation: Best Practices

- Roger Fisher's critical success factors for negotiations
 - Interests, stakeholder issues, options, standards terms/conditions, concessions, risks, contingencies
- Best practices to prevent last-minute surprises

8. Hands-on Negotiation: Exercises & Team Practice

- Terms & conditions: How to forge lasting agreements
- Subtle elements that can make or break your deals
- Negotiating with superiors, peers and teammates

9. Multi-Partite Negotiations: Case Studies

Featuring Conflict, Coercive Tactics and Hostility

- Video Case: Behind the scene of a major negotiation
- Multi-issue case: How to prevent fleeting coalitions
- Effective soft skills to manage hostility and conflict
- How to ethically deal with systematic hostility

10. How to Close a Deal or Gracefully Exit

- Ten steps to ensure a worthwhile deal and avoid deadlocks, premature or inadequate closure risks

11. Scheduling, Budgeting and Resource Allocation

- Best practices for estimating time and cost
 - Optimum team-size theory; range estimating
 - Criteria for sound scheduling and fast-tracking
 - How to identify the critical stages and milestones
 - How to manage projects with inelastic deadlines
- Schedule acceleration: How to avoid common risks
- Exercise: Estimating and mitigating completion risks
- How to allocate scarce resources and budget accurately across multiple projects: Real-life cases
- Frequency of control: Important risk-mitigation tips
- Planning and control integration: Demo and practice

12. Implementation: 360° Tools and Best Practices

- How to anticipate and control change and downtime
- Work progress: How to assess project status & risks
- Schedule and cost: How to validate new projections
- Project commissioning and phase-out issues
- Project-Execution Cases: (1) Boeing, (2) Biotech
 - Allocating scarce resources under tight deadlines
 - Controlling and making progress visible to clients
 - Corrective action to halt delays and cost overruns

13. Leading Teams: Competence and Commitment

- Core attributes of exemplary team leaders, worldwide
- Practical ways to ethically use power and lead teams
- How to lead without coercion or manipulation

"I found the course content, your presentation and the group interaction discussions simulating real life cases very enlightening. This learning of new material surprised me because I had 28 years of industrial experience and held a corporate position for 8 years ... Your course, because of its thorough analysis of the issues, will be useful to researchers considering entrepreneurship."

Noel P. Mailvaganam, Principal Research Officer, National Research Council

Location: PDI Conference Center, 10-minute drive from downtown Ottawa. **Free parking.**

Tuition Fees: Regular fees: \$2295; Government: \$2220; Group fees for 3 or more participants: \$2145 each
Fees include course materials (2 workbooks, the book "Harnessing the Power of Intelligence", three Harvard road maps), continental breakfast and light luncheons. The Registration Form and cancellation policy are on page 9.

Advanced Negotiation, Strategic Thinking, Risk Management and Exemplary Leadership Skills

Ottawa-Gatineau: June 11-14, 2012 September 24-27, 2012



Complex change – be it strategic, technological, cultural or organizational – requires talented professionals with core competencies in **strategic thinking and risk management** to plan a bold vision of change with the best portfolio of objectives and outcomes, sound **negotiation** skills to secure commitment, and **exemplary leadership** behavior to put it all together and deliver expected value with minimum friction and adverse consequences.

WORKSHOP OBJECTIVES

This practical workshop provides you with the skills, competencies, best practices and tools to lead teams, secure actionable intelligence, manage risk and shifting priorities, build allies, negotiate important decisions and deals, orchestrate complex change in a responsible and effective way, deliver under inelastic deadlines, and maintain peak performance over the long term.

WHO SHOULD ATTEND?

Managers and leaders of professional teams, negotiators, mediators, arbitrators and professionals who play a key role in policy and strategy formulation, project selection and management, and risk mitigation. Previous participants came from medium and large firms, governments, and defense establishments.

PROGRAM LEADER: ALAIN PAUL MARTIN

Chief Architect of Harvard University Global System and author of three management books, Alain Martin coaches team leaders and executives in principled leadership, negotiation, strategic procurement and risk and project management. His clients include Boeing, Bombardier, E.ON (renewable energy), Textron's Bell Helicopter, GE, Procter & Gamble, Ontario Power, biotechnology companies and governments. Recognized by PMI for "his outstanding contribution to the state-of-the-art of project management", Alain is an alumnus of Harvard Business School and Concordia University. His extensive training background includes negotiation and mediation at Harvard Law School, from which he is certified to teach negotiation in the corporation. Alain studied management of change at the Massachusetts Institute of Technology (MIT), and psychology at the Gestalt Institute of Cleveland. He has served as executive member of the Prime Minister's Committee on Government Reform and as President of Harvard Business School and Harvard University clubs.

WORKSHOP ORGANIZATION: 3 PARTS

In Part I, **Strategic Thinking and Risk**, you will learn to set and accomplish your mission by securing valid intelligence, turning threats into opportunities, pushing the envelope, mastering risks and widening your lead.

In Part II, **Principled Negotiation**, the focus is on the creative ways to enlarge the pie and secure a value that is superior to what can be gained by compromise, coercion, courts, arbitration, and other means of dispute resolution. You will hone your skills to forge lasting agreements, arbitrate disputes, buy or sell property, seek a raise or a promotion, finance a project, auction assets or simply manage day-to-day decisions and conflicts. You will be prepared to juggle with the intricacies of pricing, soft money, last-minute demands and other terms and conditions used by shrewd negotiators. Through Harvard case studies, you will practice face-to-face negotiations under increasing complexity. You will be prepared to build partnerships, craft offers and counter-offers, manage deadlocks, disarm your opponents ethically and make it difficult for them to withdraw from a reasonable deal.

Part III addresses **exemplary team leadership** and the best practices to build high-performing teams, retain talent, mobilize allies, chart clear roles and responsibility.

HAND-OUTS AND COURSE MATERIAL

Participants receive the best course material on strategy, leadership and negotiation including three road maps (Harvard University Global System™), a practical workbook, several work planning and brainstorming tools (project definition, negotiation, responsibility chart, strategy formulation, risk management), the latest Harvard® Planner, a Harvard Law School case study on multi-partite multi-issue negotiation, and the new book "*Harnessing the Power of Intelligence*".

Note: This seminar is jointly held with the *Advanced Project Management & Risk Mitigation Workshop* (Page 3).

"Excellent workshop. I highly recommend it to every negotiator and professional team leader. The best seminar I have ever attended!"

J. Martinez, Contract Administrator
Integrated Trade Systems (ITS), Houston

"I have successfully used Alain's framework to orchestrate the turnaround of North America's fastest growing casualty-insurance company."

John Harbour, President & CEO, SAAQ
Former President, Desjardins

DETAILED OUTLINE

4 Days - Value: 3.25 CEU

1. Approach, Framework and Program Overview

2. Knowing Your Stakeholders and Issues

- Understanding psychographics for sound decisions
 - Practical tools to improve analysis and interpretation
- How to anticipate and track issues during incubation
 - Scanning for threats and opportunities:
Best practices demonstration and team exercise

3. Skills for Charting a Clear Mission and Goals

- Four tests to validate mission, vision and objectives
- Multi-project portfolios: Prerequisites for balance
- Scope definition: Harvard University Global System™
- Demonstration and practice exercise

4. Strategic Brainstorming: Cutting-Edge Practices

- How to invent options: Harvard® Brainstorming Grid
- From strategy to work plan: Demo and practice
- Translating strategy into tactics and deliverables
- How to get team synergy in strategy formulation
- How to turn fence sitters and dissenters into allies

5. How to Identify and Assess Risks: 360° Perspective

- Blind spots, gray areas and value-chain risks,
- Stakeholder and political risks: Factional Analysis
- Responsibility and accountability risks
- Execution, transition and commissioning risks
- Case study: Value-chain and stakeholder risks (Hygea)

6. Mitigating Risks and Dealing with Residual Risks

- Crafting strategies to bring risk to a manageable level
- Assessing and addressing residual risks
- Effective Risk communication
- Best practice case study: Innovative risk mitigation

7. People Skills and Team Competencies

- Proven ways to empower talent and build allies
- How to get high performance with limited authority

8. How to Lead and Avoid Role Conflicts

- How to assign the responsibility and accountability of each team member: Harvard® Responsibility Chart
- Exercise integrating responsibility, accountability, power and authority into a managerial balance sheet
- Workshop demonstration and group exercise

9. Principled Negotiation: Skills in Preparation

- Team exercise to avoid rigid positions and blind spots
- Crafting interest-based deals: Critical success factors
- Detailed road map for surprise-free negotiations
- Practical tool to invent options for mutual gains
- Counter-intuitive levers (BATNA + Timing)

10. Terms and Conditions: Pricing and Bidding

- Bidding, auctioning, concessions, counter-offers, last-minute demands and advanced pricing tips
- Framing, escalation, soft money and other tactics
- Exercises and demonstrations: Terms and conditions, offers, counter-offers and concession patterns

11. Hands-on Negotiations: Practice, Practice!

- The time to secure future success is never too early
- How to avoid discord on your side of the table
- How to build trust and forge lasting agreements
- Subtle elements that can make or break deals
- How and when to act as mediator or negotiator

12. Complex Cases: Multi-partite Multi-interests

- Harvard advanced case study involving important negotiations between and within several groups
- Issue of fleeting coalitions; conflicting groups
- High-visibility negotiation: Real-life video learning

13. Managing Conflict, Coercive Tactics & Hostility

- Proven ways to manage fear, tension and conflict
- How to ethically deal with harsh negotiators who resort to systematic hostility and obstruction

14. How to Close a Deal or Exit Gracefully

- Ten steps to ensure a worthwhile deal and avoid deadlocks, premature or inadequate closure risks

15. Proactive Leadership: Team Empowerment

- Exemplary leaders: business, NGOs and governments
- Mastering self-leadership: Skills, attitudes and values
- Practical ways to use authority and power ethically
- How to lead without confrontation, coercion or manipulation and without resorting to authority

16. Synthesis and Conclusion

For a detailed outline and the latest feedback from participants, visit www.executive.org/strategy.

Location: PDI Conference Center in Ottawa-Gatineau, National Capital Region. **Free parking.**

Tuition: 4 days: Regular fees: \$1795; Government: \$1720; Group fees for 3 or more participants: \$1645 each
5-day Option includes Topics 11, 12 and 13 of the Advanced Project & Risk Management Skills (p. 3).
Regular fees: \$2295; Government: \$2220; Group fees for 3 or more participants: \$2145 each

Fees include all course material (2 workbooks, the book “*Harnessing the Power of Intelligence*”, case studies, 3 Harvard® road maps), a daily continental breakfast, a light luncheon plus hot and soft drinks twice a day.

Register by phone or fax. Fees are payable in advance by cheque or credit card. Send your cheque payable to: *The Professional Development Institute PDI Inc.* Fees exclude meals and hotel accommodation (if required). Clients registering as a group must send substitutes in lieu of cancelling. For other clients, cancellations are accepted if made at least 10 working days prior to the course, and are subject to a \$100 service charge per person. Full fees are payable by anyone who fails to attend or cancels less than 10 working days prior to a course. One substitution or transfer to a later course of the same duration is accepted. Tuition fees subject to change.

Professional Skills for Writing with Clarity and Impact

For Administrative Assistants, Secretaries, Proofreaders and Managers Who Wish a Review
Ottawa-Gatineau: Feb, 27-29, 2012 May 14-16, 2012



WORKSHOP OBJECTIVES

Crafting e-mail, reports and daily correspondence with clarity, coherence and impact is vital for all employees. Administrative professionals with the skills to write, edit and proofread are invaluable to leaders who are focused, productive, and effectively managing their own time. As a participant, you will practice with unique exercises designed to reinforce the learning. You can expect to acquire lasting skills and increased proficiency in business correspondence, the cornerstone of corporate productivity and personal success.

Who should attend: Assistants, proofreaders, managers and anyone who would benefit from: a refresher course in the building blocks of English (proofreading, spelling, punctuation); a review of difficult expressions and styles commonly used in business; instruction that will result in concise, readable English; guidance in crafting more effective letters and memos.

Tuition Fees: Regular fees: \$1095; Government: \$1045
Group fees for 3 or more participants: \$995 each

DETAILED OUTLINE - 2.5 DAYS - 2.25 CEU

- 1. Correct Usage: Common Difficulties**
 - Subject-verb agreement
 - Dangling modifiers; confusing word pairs
 - Pronoun usage; possessives; parallel structure
- 2. Punctuation Review**
 - Rules and special cases for the comma, semi-colon, colon, dash, parentheses
- 3. Spelling, Capitalization and Proofreading Tips**
 - Forming possessives; keeping a personal list
 - Using mnemonics; word division; illustrations
 - Useful capitalization rules and peculiar cases
 - Best practices to proofread accurately and spot errors
 - How to find misspellings ignored by spell checkers
 - Business reports, letters and e-mail
- 4. Writing Clear English: Demonstration & Practice**
 - Choosing the right words; eliminating wordiness
 - Writing directly to the reader; practice workshop
- 5. Writing Clear Letters, e-mail & Meeting Minutes**
 - Organizing your thoughts, evidence (facts & figures)
 - Writing effective beginnings and endings; examples
- 6. Synthesis & Conclusion: Practical Lessons**

Finance & Accounting for Managers and Professionals

Skills and Tools to Improve Your Planning, Budgeting and Control Decisions
Ottawa-Gatineau: February 29 - March 2, 2012 May 16-18, 2012



WORKSHOP OBJECTIVES

This seminar provides you with the principles, tools and techniques of modern finance and accounting. You will invest ample time practicing on real-life problems. The focus is on the use of financial information to:

- Understand the principles of finance including ratios for measuring productivity, liquidity and profitability;
- Analyze income statements and balance sheets;
- Address your management concerns about risk;
- Allocate scarce resources, fund projects, mitigate risk
- Improve your planning, budgeting and control skills;
- Maximize effectiveness and efficiency by managing the performance drivers that count; and gain the financial insights to resolve every-day problems.

WORKSHOP LEADER: Pierre Bergeron

An award-winning author of eight books, Prof. Bergeron has written extensively on performance management, finance, planning, and capital budgeting for professional journals. He is the recipient of the Walter J. MacDonald award for his series of articles on capital budgeting decisions, which appeared in the *Camagazine*.

For references and more, visit www.executive.org.

Tuition: Regular fees **Government** Groups of 3 or more
 \$1295 **\$1245** \$1195 each
Registration instructions on Page 9

DETAILED OUTLINE - 3 DAYS - 2.75 CEU

- 1. Learning the Language and Concepts**
 - Time value of money, economic value added, EBITDA
 - Growth, taxes, retained earnings, goodwill, sunk costs
 - Mastering the difference between:
 - Market & book values; gross & contribution margins
 - Amortization, depreciation, capital-cost allowance
- 2. How to Read Financial Statements**
 - Income statement, balance sheet
 - Statements of cash flow and retained earnings
- 3. How to Interpret Financial Statements**
 - Liquidity, profitability and asset-management ratios
 - Debt/coverage and market-value ratios
 - Financial health score; sustainable growth rate
- 4. How to Use Financial Decision-Making Tools**
 - Economic Value Added and break-even analysis in costing, pricing and investment decisions
 - Pro-forma income and cash-flow statements
- 5. How to Evaluate Capital-Investment Decisions**
 - How to use capital budgeting tools
 - Net present value (NPV); internal rate of return
 - Payback period, sensitivity analysis, risk analysis
 - How to analyze investment opportunities
 - Valuing ongoing businesses; cash flow projections
 - Evaluating capital financing options: internal versus external financing; cost of capital vs. capital assets investments; raising funds (internal/external sources)
- 6. Exercises, Synthesis and Conclusion**

Administrative Assistants & Executive Secretaries Skills

Best Practices and Tools for Partnering with Your Team and Management and Moving Forward
Ottawa-Gatineau: March 12-14, 2012 June 4-6, 2012



WORKSHOP OBJECTIVES

This first unique 3-day workshop has been specifically designed for management assistants and professional secretaries who are struggling with an ever-increasing workload and resource constraints. The focus is on skills, tools and techniques to improve productivity, build a winning team with management and peers, and maximize value to your organization. The specific objectives of this unique experience are to help you:

- Set and negotiate goals, priorities and urgency in partnership with your manager(s);
- Organize your day and manage your time including deadlines, e-mail, voice mail, meetings, drop-in visitors and other time-wasters;
- Manage conflicts, difficult people, crises and awkward situations assertively;
- Make your manager(s) more effective; improve your working relationship; assume more leadership and managerial responsibility without the benefit of authority; build empowerment-inducing habits;
- Clarify your role and excel in working with peers, multiple managers and demanding clients;
- Practice in a friendly atmosphere and seek guidance from the seminar leader;
- Make your job more meaningful, build trust, and take charge of your growth and career plans.

PREWORK

Much of your time during this workshop will be invested to deal with back-home problems and barriers to building a winning team. We believe learning occurs most readily when quickly applied to real-life situations you care about. Therefore, we want you to do some thinking before the workshop about:

1. Activities that make up your job and percentage of time spent on each per week.
2. Two interpersonal situations you have a difficulty with on the job, e.g. negotiating priorities with one or more bosses, cutting off conversations, keeping people from disturbing your manager(s), delegating work to others, enforcing deadlines. Who is involved? When does it occur? How do you usually handle the situation?

For a detailed feedback from recent participants, please visit www.executive.org and click on the seminar title.

Tuition Fees	Regular fees	Govern-ment	Groups of 3 or more
Seminar I (3 days):	\$1295	\$1245	\$1195 each
Advanced Seminar, see www.executive.org (2 days)	\$995	\$945	\$895 each

DETAILED OUTLINE - 3 DAYS - 2.75 CEU

1. Taking Charge without the Benefit of Authority

- Understanding the importance of your position
- The art of building and using constructive power
 - Demonstration and practice
- Insights into interpersonal compatibility: FIRO-B
- Profession executive assistant: A model of success
- Managing your boss: How to build a winning team

2. How to Set Goals and Priorities: Goal Maps

- Personal and business goals: Practical validity tests
- How to set and validate your goals: Team exercise
- How to negotiate and resolve goal conflicts
- How to assess priority and deadlines
- In-basket exercise on priority and urgency

3. Personal Organization - Scheduling Your Day

- How to set reasonable deadlines; securing agreement
- How to control your day and focus on high-return tasks
- How to work in an open-office environment
- Open-door policy: Do's and don'ts
- The quiet hour: How to make it happen
- Working smarter not harder: Eight good drivers to secure greater control over your agenda

4. Smart Search: How to Get the Best Results Quickly

- New ways to mine Bing and Google Advanced Search
- How to reduce your workload through the invisible Web
- High-productivity tips for managers and assistants

5. Communication, E-mail and Filing Systems

- Practical tips for telephone, voice and e-mail
- How to select the best file system: Practical teamwork

6. How to Control Interruptions and Time-Wasters

- How to control drop-in visitors and interruptions
- Practical tips to deal with major time-wasters: Phone calls, paperwork, equipment and working tools

7. How to Prepare Shorter and Productive Meetings

- When to opt for conference calls, face-to-face meetings and other means of communication
- How to run effective meetings: Hyman Rickover tips
- Video-learning exercise: Meetings Bloody Meetings

8. Managing Conflicts and Difficult People

- Diagnosing conflicts affecting administrative staff
- Understanding our own behavior, context and interpersonal situation dynamics; preparing for the worst
- How to discuss sensitive complaints: best scenarios
- Managing difficult bosses and co-workers:
 - Dealing with aggressive and passive-hostile types
- Video case study, team exercise and guided learning

9. Preventing Role and Responsibility Conflicts

- How to clarify your role with your boss and peers
- How to prevent unfair evaluations
- Practical exercise in role and responsibility charting

10. Building the Foundation for Career Excellence

- Assessing personal strengths and goals; removing barriers to professional growth
- Maximizing opportunity and visibility
- Practical tips and references for building an excellent career and a proactive life

11. Synthesis and Conclusion

Advanced Practical Skills for Administrative Professionals

Exclusively Available to the Participants Who Have Completed the First 3-Day Seminar (p. 7)

Ottawa-Gatineau: June 7-8, 2012



THE GROWING DEMANDS

Important responsibilities, once reserved for managers, are now gradually assigned to competent secretaries, administrative assistants and office managers who are focused, open-minded and tactful team players. There is a growing demand for these professionals who possess the skills to:

- Plan work, organize and lessen the bosses' workload;
- Anticipate the details that count for multiple bosses;
- Search, validate and summarize information from a wide range of sources including the Internet;
- Cooperate and negotiate with a variety of people;
- Deliver solid results with people and projects.

WORKSHOP OBJECTIVES

Through practical exercises and real-life illustrations, this intensive workshop builds on the first seminar to equip you with tangible qualifications and tools to excel both individually and in teams. It provides you with the skills to undertake important responsibilities and play a growing role in your team, including:

- Planning and coordination of projects;
- Conducting elaborate research on the Internet;
- Negotiating sensitive issues with clients and teams;
- Taking control of difficult situations;
- Orienting, coaching and supervising clerical staff;
- Building lasting trust with your team and others.

At the end of the complete program, you will be thoroughly prepared to:

- Play a key productive role in your organization;
- Skillfully negotiate better deals and conditions;
- Remove the main barriers to sound career growth;
- Turn your dream and vision into reality.

This unique workshop is for serious professionals who are seeking practical and proven methods to excel, i.e. perform at their peak, move forward and fulfill their greatest potential.

For a detailed feedback from recent participants, please visit www.executive.org and click on the seminar title.

Tuition Fees	Regular fees	Government	Groups of 3 or more
Seminar I (3 days, Page 6):	\$1295	\$1245	\$1195 each
Adv. Seminar (2 days):	\$995	\$945	\$895 each
Complete 5-day program:	\$1995	\$1895	\$1795 each

Registration instructions on Page 9

DETAILED OUTLINE - 2 DAYS - 2 CEU

1. Professionalism for Secretaries and Assistants

- The foundation of a winning boss-assistant team
- Essential knowledge, skills and attitudes for leaders, executive assistants and administrative professionals
- Team learning exercise: How to identify your strengths and how to deploy them in teams
- Practical success and failure lessons from successful assistants and administrative professionals

2. Finding the Right Details for Quality Decisions

- Anticipating the details that count for your bosses
- How to get quality and acceptance and manage risk

3. New and Advanced Ways to Search Online

- Getting prompt results with the best search engines
- How to speed-up and integrate several searches (Web, e-mail and internal files) into a single query
- Proven practical tips to avoid wasting time online

4. How to Delegate Administrative Work

- What should not be delegated
- How to delegate to administrative and support staff
 - Orienting, coaching and supervising prerequisites
- Tapping the strengths of your team members
- Getting your manager to delegate to you

5. Project-Management Skills to Serve Your Team

- Taking charge of small projects: Simple tools for planning and tracking small projects
- Project definition: 360° Critical success factors
- Understanding project scope, value chain and risks
- Risk management tools, illustrations and exercise
- Estimating time, resources and cost: Best practices
- Powerful scheduling techniques that make projects transparent to everyone in the project regardless of educational background and experience

6. Rapid Progress Tracking Tools and Skills

- Work progress control: How to assess project status and make progress visible to your management
- Early warnings to prevent delays and cost overruns

7. Negotiation Principles Critical to Your Success

- How to prepare for any type of negotiation with bosses, peers, clients, suppliers and subordinates
 - Common errors and tips to avoid rigid positions
- Subtle elements that can make or break deals
- Practice exercises: Dealing with objections, splitting the difference, concessions, "fait accompli", power
- How to express disagreement with confidence
- Steps to ensure good deals and avoid deadlocks
- How to exit gracefully when required

8. Case Studies and Practical Exercises

9. Putting It All Together

- Preparing cautiously for managerial responsibility
- Final tips on leadership for administrative staff

10. Synthesis & Conclusion

Advanced Workshop for New Managers & Team Leaders

Focusing on Strength Deployment, Leadership Opportunities, and Career Growth
Ottawa-Gatineau: August 30-31, 2012



WORKSHOP OBJECTIVES

This intensive 2-day program takes you beyond the skills acquired in the first session, with further tools, solid techniques and practical knowledge to make sound decisions, unleash your potential and accelerate your progress toward greater success. The objective is to fully utilize your potential, to excel as a coach and competent manager for individual and team success, and in the interest of your organization. By applying the newly acquired skills, you will be able to improve your performance, identify new strengths, prepare for the unexpected, take reasonable risks, gain more professional freedom, and systematically chart your future, using a proven Gestalt approach. You will also learn to get the information and intelligence you need to make important decisions quickly and in a fraction of the time it takes with widely used search techniques.

This 2-day workshop and its 3-day prerequisite (New Manager & Team Leader Workshop, on page 1) provide, in five intensive days, the skills that require years of experience by learning management on the job.

Important

This program is in high demand. Please register early.

Location: PDI Conference Center in Ottawa-Gatineau, National Capital Region. **Free parking.**

Tuition: Regular fees: \$995; Govt: \$945; Group of 3 or more: \$895 each. Complete 5-day fees on Page 1.

DETAILED OUTLINE - 2 DAYS - 1.5 CEU

- 1. How to Create Better Value and Prompt Decisions**
 - How to get the external information you need faster
 - Three instruments to successfully manage change
 - Application to personal growth
- 2. Advanced Session on Strength Deployment**
 - How to find and capitalize on your competencies both in normal and under-crisis situations
 - Strength deployment exercise; instructor feedback
- 3. Sharing Experience from the First Seminar**
 - Participants will discuss experience in teams: managing difficult people, team building, conflict resolution, motivation, and delegation
- 4. Effective Coaching for Peak Performance**
 - Critical success factors for managers & team leaders
 - How to coach your team to get exceptional results
 - Teamwork on coaching
- 5. Practical Lessons from Exemplary Leaders**
 - Hewlett-Packard's Fiorina: From clerk to president
 - How a front-line manager turned diversity from a perceived threat into a success story
 - Issues facing women and minorities
- 6. Road Map to Take Full Control of Your Career**
 - How to set and validate your mission, vision, and a balanced portfolio of goals and priorities
 - Life and career planning: A step-by-step road map

Seminar Registration Form

Seminar _____ Date _____ Location: _____
Surname _____ First Name _____ Title _____
Organization _____ Division _____ Room _____ Floor _____
Address _____ City _____
Prov. _____ P. Code _____ **Business** _____ **Home** _____
Fax _____ E-mail _____ **Approved by** _____

How to Register: Register by phone or fax. Payable in advance by cheque or credit card. Send your cheque payable to: *The Professional Development Institute PDI Inc.* Fees exclude meals and hotel accommodation. Clients registering as a group must send substitutes in lieu of cancelling. For other clients, cancellations are accepted if made at least 10 working days prior to the course, and are subject to a \$100 service charge per person. Full fees are payable by anyone who fails to attend or cancels less than 10 working days prior to a course. One substitution or transfer to a later course of the same duration is accepted. Tuition fees subject to change. Please call us or visit www.executive.org for current fees and dates.



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