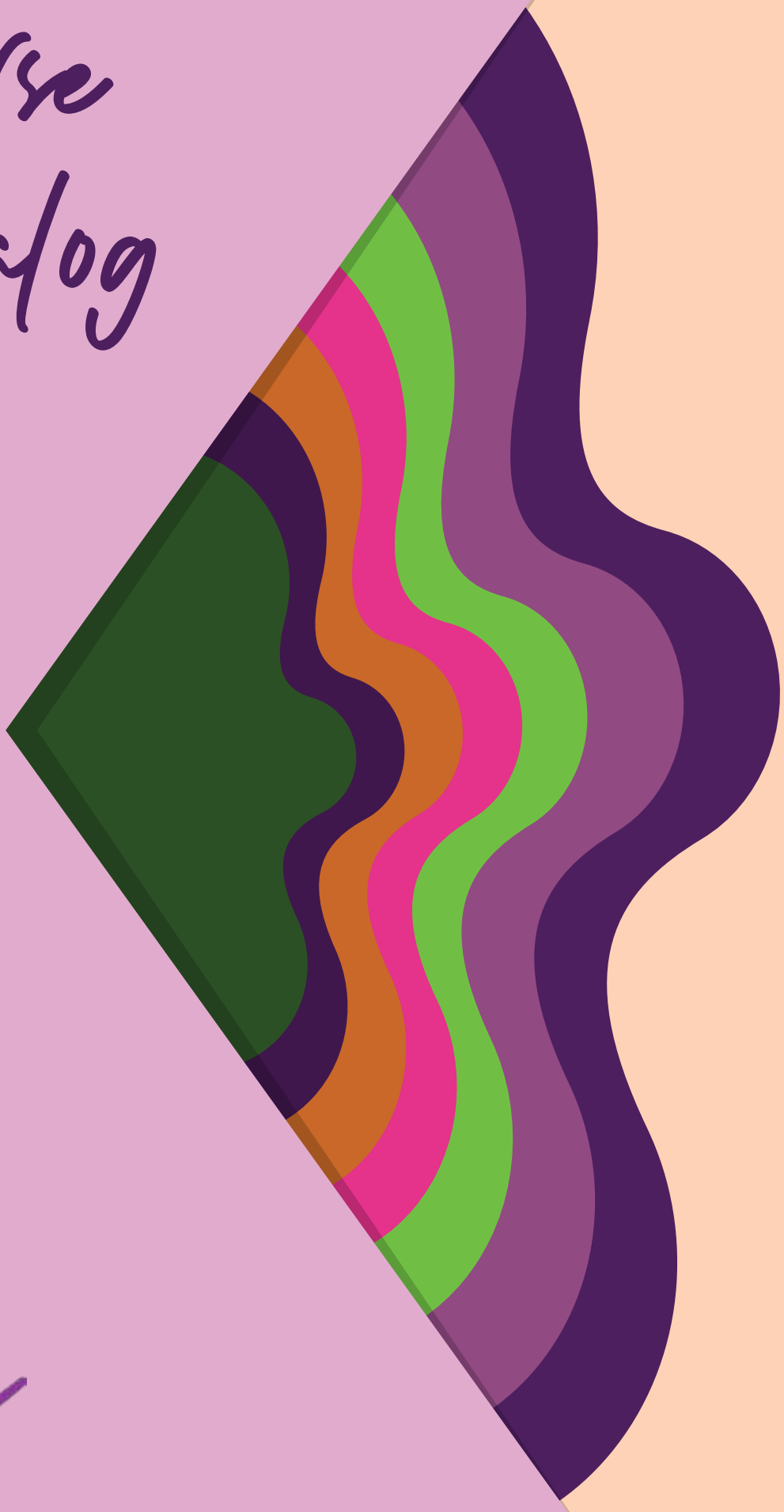
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AI & Modern Microsoft Work

Introduction to Copilot

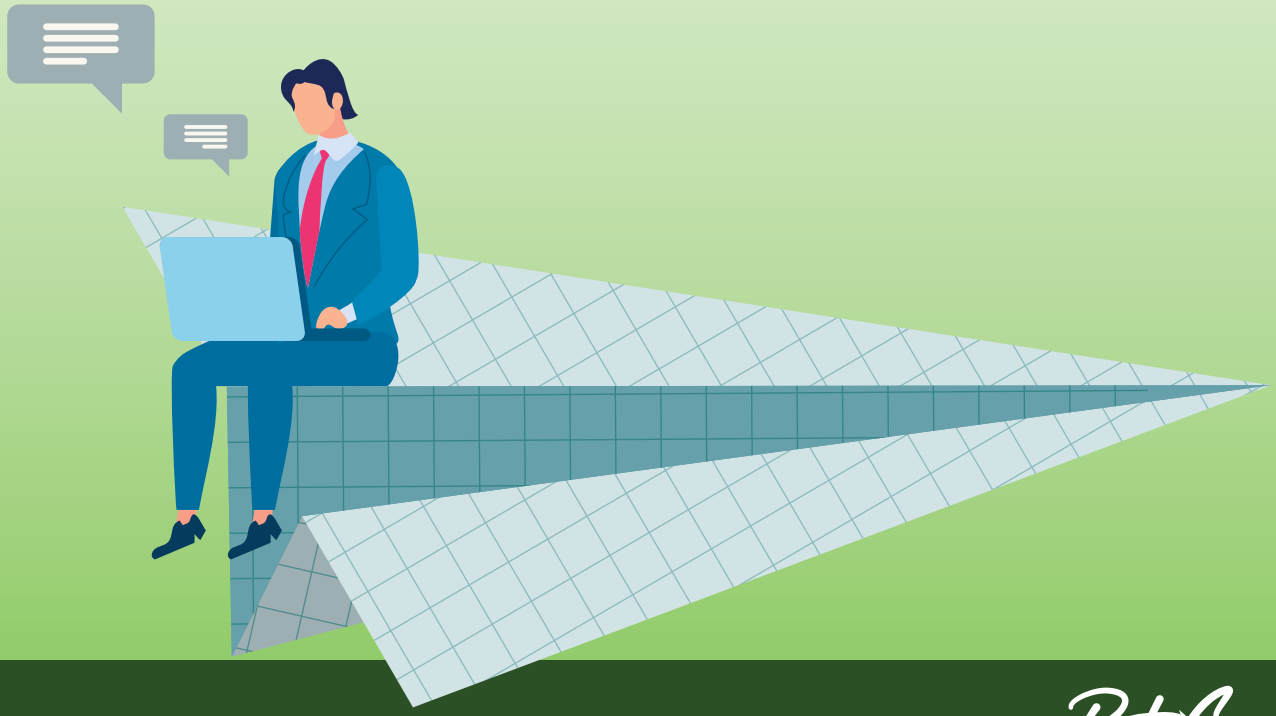
Participants Will Explore:

CoPilot Helps You Work Smarter, Faster, and Stay Organized: CoPilot is an AI assistant integrated into Microsoft 365 that supports everyday work by helping users create content faster, stay organized, and complete tasks more efficiently across applications.

Productivity Improves When Tasks Are Streamlined and Automated: CoPilot reduces time spent on manual work by streamlining tasks, generating ideas quickly, and allowing users to focus on higher-value work instead of repetitive effort.

CoPilot Supports Key Workflows Across Content, Data, and Communication: From content creation and summarization to organizing information and analyzing data, CoPilot helps users manage core responsibilities more effectively and consistently.

CoPilot Is Accessible Across Tools, Devices, and Work Environments: CoPilot can be used across Microsoft applications like Word, Excel, PowerPoint, Outlook, and OneNote, and is available on web, mobile, and desktop. Making it easy to integrate into daily workflows anywhere.



2 Hours

BtoC SOLUTIONS

Microsoft PowerPoint Introduction

Participants Will Explore:

Effective Presentations Start with a Clear Purpose: Strong presentations begin by defining the goal, audience, desired action, and barriers that may prevent the audience from responding. When the purpose is clear, every slide has a reason and every message supports the outcome.

Structure Turns Information into a Clear Message: PowerPoint is most effective when content is organized around the type of presentation being delivered, whether the goal is to report progress, support a decision, make a sales pitch, or teach a skill. A strong structure helps the audience follow the message and understand what to do next.

Visual Design Helps People Understand and Remember: Presentations should use brand elements, simple layouts, and effects sparingly so the visual design supports the message instead of distracting from it. Because people process visuals quickly, strong design choices can make complex information easier to understand.

PowerPoint Tools Improve Delivery, Collaboration, and Engagement: PowerPoint supports stronger presentations through tools for creativity, presenting, collaboration, media, data, and navigation. Features like Presenter View, Smart Lookup, screen recording, video, custom shows, Excel objects, and online collaboration help presenters create more polished and useful presentations.



Full Day or Half Day

BtoC SOLUTIONS

Writing Effective CoPilot Propmts

Participants Will Explore:

Better Prompts Lead to Better Results: A prompt is the instruction that guides CoPilot's response, and the quality of that instruction directly impacts the output. When users provide clear direction, CoPilot can deliver more accurate, relevant, and useful responses.

Clarity and Context Drive More Accurate Outputs: CoPilot performs best when prompts include a clear goal and relevant context. The more detail provided about the task, background, and intent, the more precise and valuable the response becomes.

Structuring Prompts Improves Consistency and Usability: Effective prompts define expectations by specifying format, sources, and desired outcomes. Setting clear instructions such as summaries, bullet points, or detailed explanations. Helps ensure consistent and actionable results.

Strong Prompting Requires Practice and Continuous Refinement: Users improve results by testing, refining, and adjusting prompts over time. Tools like CoPilot Lab and experimenting with variations help build confidence and generate more effective outputs across tasks.



2 Hours

BtoC SOLUTIONS

CoPilot on the Web

Participants Will Explore:

CoPilot on the Web Enables Fast, Chat-Based Interaction: Users can access CoPilot through a browser and start conversations instantly to ask questions, generate ideas, and receive responses in real time, making it ideal for quick, flexible tasks.

Editing and Refining Prompts Improves Results: CoPilot allows users to edit prompts or explore related topics within the same session, helping refine outputs and improve accuracy without starting over.

CoPilot Supports Multiple Use Cases Including Code and Content Creation: On the web, CoPilot can assist with writing scripts, debugging, explaining code, and supporting a wide range of content needs, allowing users to move between tasks efficiently.

Multimodal Features Expand What Users Can Create and Explore: Users can add images to prompts, generate AI-driven visuals, and access CoPilot directly in tools like the Edge sidebar, enabling more dynamic and interactive workflows.



2 Hours

BtoC SOLUTIONS

CoPilot in the App

Participants Will Explore:

CoPilot Mobile Enables Productivity on the Go: The CoPilot mobile app allows users to access AI support anytime by signing in and using chat-based interactions directly from their device, making it easy to stay productive outside the desktop environment.

Conversation-Based Interaction Makes Work Fast and Flexible: Users can chat with CoPilot through text or voice, ask questions, generate content, and quickly get responses. Allowing work to happen naturally in real time wherever they are.

Multimodal Inputs Improve Context and Output Quality: CoPilot supports adding images through the camera or photo library, giving users the ability to provide visual context and receive more relevant, tailored responses.

Copilot Supports Content Creation and Image Generation Anywhere: From writing content to generating images, the mobile app allows users to complete key tasks quickly, extending CoPilot's capabilities into everyday, on-the-go workflows.



2 Hours

BtoC SOLUTIONS

CoPilot in Excel

Participants Will Explore:

CoPilot Simplifies Data Preparation and Organization: CoPilot helps users quickly prepare data by highlighting, sorting, and filtering information, making it easier to clean and organize datasets for analysis.

Visual Formatting Makes Data Easier to Interpret: Using features like conditional formatting, data bars, icon sets, and highlighting top values allows users to quickly identify trends, outliers, and key insights within their data.

Automating Calculations Improves Efficiency and Accuracy: CoPilot supports the creation of formula-based columns, reducing manual work and helping ensure calculations are consistent and reliable across datasets.

CoPilot Helps Users Understand and Analyze Data More Effectively: Beyond formatting and calculations, CoPilot assists in making sense of data by helping users explore patterns and gain insights, turning raw data into actionable information.



Full Day or Half Day

BtoC SOLUTIONS

CoPilot in Outlook

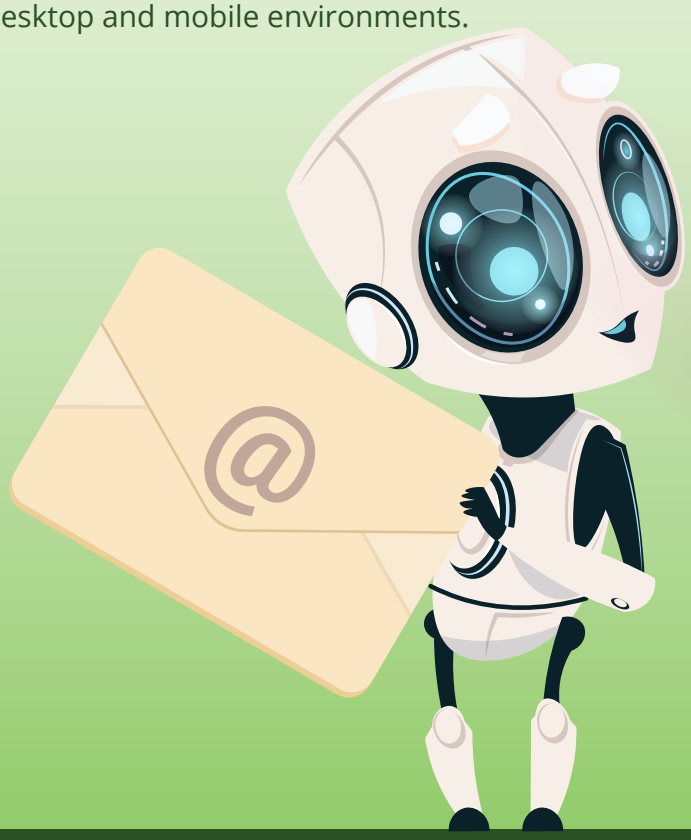
Participants Will Explore:

CoPilot Streamlines Email Creation and Communication: CoPilot helps users draft emails quickly by generating clear and structured messages, reducing the time spent writing and improving overall communication quality.

Faster Responses Improve Productivity and Responsiveness: Users can generate replies to emails with CoPilot, allowing them to respond more efficiently while maintaining clarity and consistency in their communication.

Summarization Helps Manage High Email Volume: CoPilot can summarize email threads, helping users quickly understand key information and decisions without reading through long conversations.

CoPilot Extends Email Productivity Across Devices: With support in the Outlook mobile app, users can draft, review, and summarize emails on the go, ensuring consistent productivity across desktop and mobile environments.



2 Hours

BtoC SOLUTIONS

CoPilot in Word

Participants Will Explore:

CoPilot Accelerates Document Creation from the Start: Users can quickly create document drafts using prompts, allowing them to move from idea to first draft faster while reducing time spent starting from scratch.

CoPilot Enhances and Expands Existing Content: CoPilot can build on existing documents by generating additional ideas and content, helping users expand their work without needing to rewrite or rework entire sections manually.

Rewriting Improves Clarity and Quality of Communication: Users can ask Copilot to rewrite content and generate alternative drafts, making it easier to refine tone, structure, and readability without starting over.

CoPilot Helps Analyze and Transform Content Efficiently: From summarizing documents and answering questions to transforming content into structured formats like tables, CoPilot helps users better understand and present their information.



2 Hours

BtoC SOLUTIONS

CoPilot in PowerPoint

Participants Will Explore:

CoPilot Accelerates Presentation Creation from Multiple Starting Points: Users can create presentations using the Narrative Builder, generate slides from an existing document, or work directly through the CoPilot chat pane. This flexibility allows users to move quickly from idea to structured presentation.

CoPilot Enhances Slide Design and Organization through Prompts: With simple prompts, users can add slides, insert images, apply design changes with Designer, and organize content more effectively. Helping improve both the structure and visual quality of presentations.

CoPilot Helps Transform and Improve Existing Presentations: Users can edit, reorganize, and refine presentations by leveraging CoPilot to restructure slides, adjust layouts, and enhance content, reducing manual editing effort.

CoPilot Supports Understanding and Analysis of Presentation Content: CoPilot can summarize presentations, highlight key information, and answer questions about content, making it easier for users to quickly understand and communicate key messages.



2 Hours

BtoC SOLUTIONS

CoPilot in OneNote

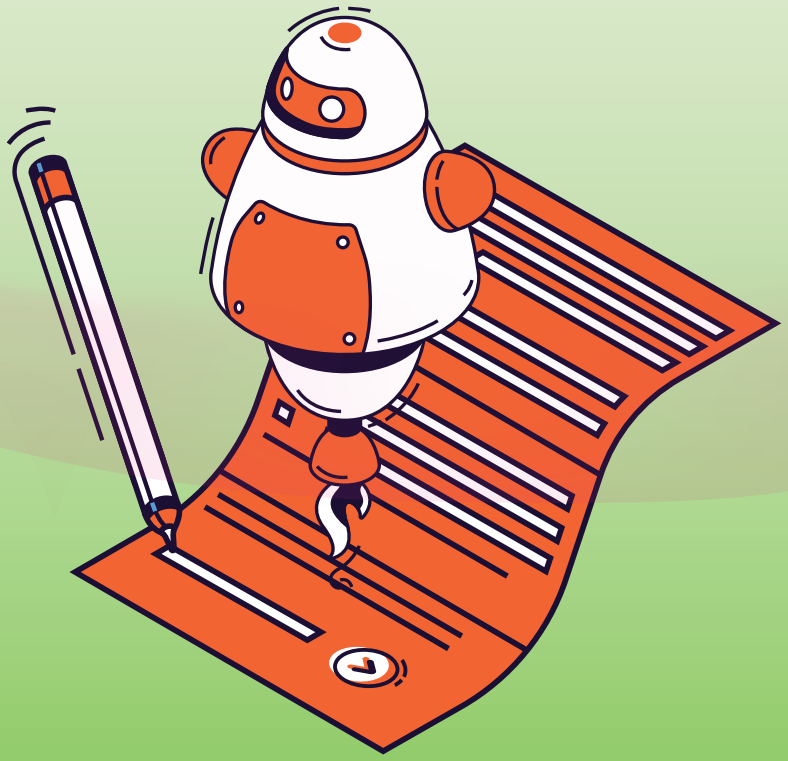
Participants Will Explore:

CoPilot Simplifies Note Creation and Organization: Users can quickly create new notes or pages by using prompts, allowing them to capture ideas and structure information more efficiently from the start.

Continuous Chat Enables Flexible and Ongoing Note Development: CoPilot allows users to continue conversations to expand notes or shift topics, making it easier to build, refine, and organize information dynamically.

Rewriting Improves Clarity and Usability of Notes: Users can rewrite notes using detailed prompts, helping improve structure, clarity, and readability without manually reworking content.

CoPilot Supports Planning, Summarization, and Insight Generation: From creating to-do lists and plans to summarizing notes and generating pros and cons. CoPilot helps users turn information into actionable insights and decisions.



2 Hours

BtoC SOLUTIONS

Outlook Beyond Email & Calendar

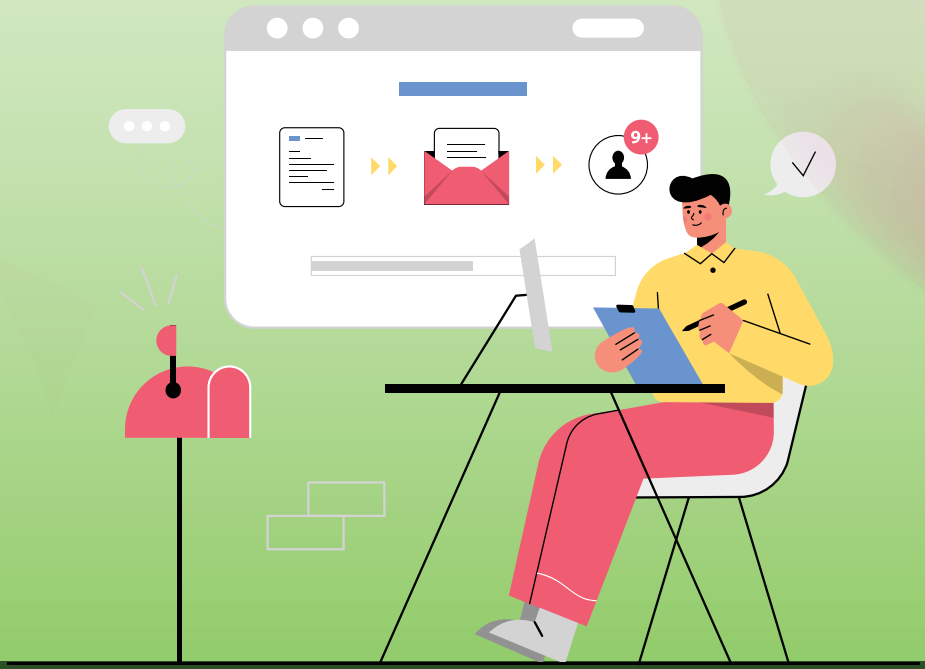
Participants Will Explore:

Outlook Enables Broader Productivity Beyond Basic Email Use: Outlook provides a wide range of tools beyond email and calendar, including environment management, communication features, task tracking, and contact management that support more efficient daily workflows.

Customization Improves Efficiency and User Control: Users can personalize their Outlook environment through settings such as fonts, message handling, calendar preferences, and account options, allowing them to tailor the experience to their working style.

Advanced Email Tools Improve Communication Quality and Organization: Features like Quick Parts, tracking options, delayed delivery, categorization, and rules help users manage high email volume, automate repetitive actions, and communicate more effectively.

Integrated Features Support Planning, Collaboration, and Task Management: Outlook connects email, calendars, contacts, and tasks by enabling scheduling tools, shared calendars, contact management, and task tracking, helping users stay organized and aligned across their work.



3 Hours

BtoC SOLUTIONS

Maximizing Productivity with Microsoft Tams

Participants Will Explore:

Microsoft Teams Centralizes Communication, Collaboration, and Planning: Microsoft Teams serves as a single hub where users can communicate, collaborate on files, and coordinate work, reducing the need to switch between tools and improving overall workflow efficiency.

Structured Teams and Channels Drive Clarity and Organization: Work in Teams is organized through teams, channels, and tabs, allowing users to group content by topic, project, or audience. A clear structure ensures the right people have access to the right information at the right time.

Choosing Between Chat and Channel Posts Improves Communication: Chats are designed for private, real-time conversations, while channel posts act as shared message boards for teams. Using the right communication method ensures messages are visible, organized, and aligned with team goals.

Integrated Tools Support Collaboration, Meetings, and Productivity: Teams combines file sharing, real-time collaboration, meetings, notifications, and apps in one platform, enabling users to manage work, track updates, and stay connected without leaving the environment.



3 Hours

BtoC SOLUTIONS

Getting the Most from Microsoft Word

Participants Will Explore:

Word Provides Powerful Tools for Creating Professional, Consistent Documents: Microsoft Word allows users to control formatting, layout, and structure at both the individual and document level, helping ensure consistency and a polished, professional appearance.

Styles, Themes, and Formatting Features Improve Efficiency and Design: Features like QuickStyles, themes, and formatting tools enable users to quickly apply consistent design elements such as fonts, colors, and spacing across entire documents.

Visual Elements and Layout Tools Enhance Communication Impact: Word supports images, shapes, tables, and embedded Excel data. Allowing users to transform text-heavy documents into clear, visually engaging content that communicates information more effectively.

Automation and Collaboration Features Increase Productivity: Tools such as Find & Replace, Quick Parts, templates, mail merge, and Track Changes help users save time, reduce repetition, and collaborate efficiently while maintaining control over document content and revisions.



Full Day or Half Day

BtoC SOLUTIONS

CoPilot Master Course

Participants Will Explore:

CoPilot Enables Smarter, Faster Work Across Tasks and Use Cases: CoPilot helps users generate content, summarize information, analyze data, and support tasks such as emails, reports, brainstorming, and images. Allowing them to work more efficiently across everyday workflows.

Clear and Structured Prompting Drives Better Results: Effective use of CoPilot starts with defining a goal, providing context, specifying sources, and setting expectations. Ensuring more accurate, relevant, and useful responses.

CoPilot Enhances Productivity across Platforms and Microsoft 365 Apps: Users can interact with CoPilot on the web, mobile app, and across tools like Excel, Outlook, Word, PowerPoint, and OneNote to draft content, analyze data, organize information, create presentations, and manage communication more efficiently.

CoPilot Transforms Information into Actionable Insights and Outputs: Across all use cases, CoPilot helps users move from raw information to structured outputs (summaries, documents, presentations, plans, and insights) supporting better decision-making and execution.



9 Two Hours Sessions

BtoC SOLUTIONS

Outlook Tips, Tricks & Secrets

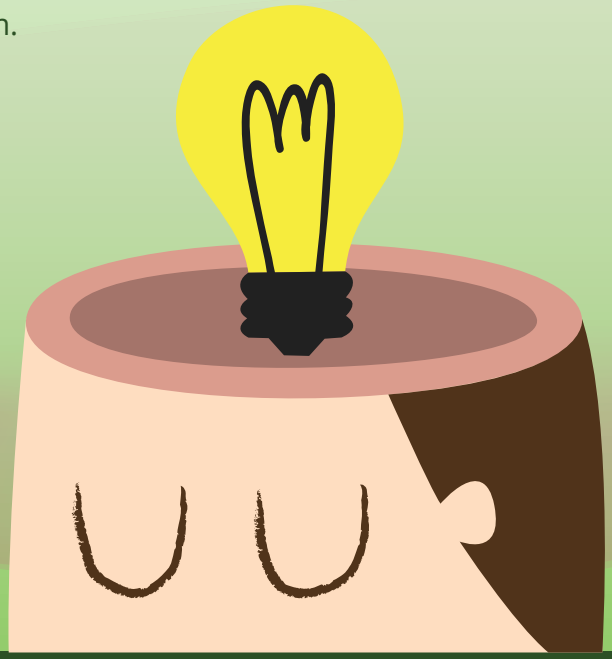
Participants Will Explore:

Outlook Is a Central Hub for Communication, Planning, and Task Management: Outlook combines email communication, meeting management, resource tracking, task management, and information sharing in one platform, helping users manage both individual work and team collaboration more effectively.

Customizing the Outlook Environment Improves Efficiency and Control: Users can configure mailboxes, create signatures, set automatic replies, and personalize settings to match their workflow, ensuring faster access to tools and more consistent communication across tasks.

Effective Email Management Drives Productivity and Communication Quality: Outlook provides tools for creating, organizing, and managing email, including attachments, folders, search, Quick Steps, and message tracking. Helping users reduce clutter, save time, and communicate more clearly.

Integrated Features Support Scheduling, Organization, and Collaboration: Through calendar coordination, contact management, and task tracking, Outlook enables users to schedule meetings, share calendars, manage relationships, and stay on top of priorities in a single connected system.



3 Hours

BtoC SOLUTIONS

AI for Power Excel Users

Participants Will Explore:

AI Enhances Excel by Turning Data into Faster Insights and Decisions: AI tools in Excel help users analyze data, uncover patterns, generate insights, and automate tasks. Allowing them to move from raw data to actionable decisions more efficiently.

Understanding When to Use AI Improves Productivity and Judgment: AI is most effective for repetitive tasks, data analysis, forecasting, and brainstorming, while tasks requiring human judgment, creativity, or relationship-building still rely on traditional approaches.

Excel AI Features Simplify Analysis, Visualization, and Formula Creation: Capabilities such as Flash Fill, Analyze Data, Forecasting, and Formula by Example allow users to recognize patterns, ask questions in natural language, generate formulas, and create visualizations without complex manual steps.

Integrating AI with Excel Expands Problem-Solving and Automation Capabilities: Connecting Excel with tools like ChatGPT and Copilot enables users to generate formulas, analyze data with natural language, automate workflows, and gain deeper insights. Making advanced analytics more accessible to all users.



Full Day or Half Day

BtoC SOLUTIONS



Communication, Presentations & Guest Experience

Presenting with Purpose

Participants Will Explore:

Successful Presentations Begin with a Clear Purpose and Message: Effective presenters define their objective, understand their audience, and organize content around a clear message. Strong presentations are designed to communicate ideas in a way that drives understanding, engagement, and action.

Persuasion Requires More Than Information. It Requires Connection: Persuasive presentations combine logic, credibility, and audience-focused communication to influence decisions. Presenters learn to structure their message around audience needs, communicate with confidence, and create a compelling case for action.

Visual Design and Delivery Techniques Strengthen Audience Engagement: Well-designed visuals, thoughtful slide structure, and effective delivery techniques help audiences absorb and retain information. Strong presenters use visuals to support key messages rather than distract from them, creating a more impactful presentation experience.

Preparation and Practice Build Confidence and Improve Results: Successful presentations are rarely improvised. Through planning, organizing content, managing presentation flow, and practicing delivery, presenters gain the confidence needed to communicate clearly, respond effectively, and leave a lasting impression on their audience.



Full Day or Half Day

Create my PowerPoint℠

The Art of Great Communication

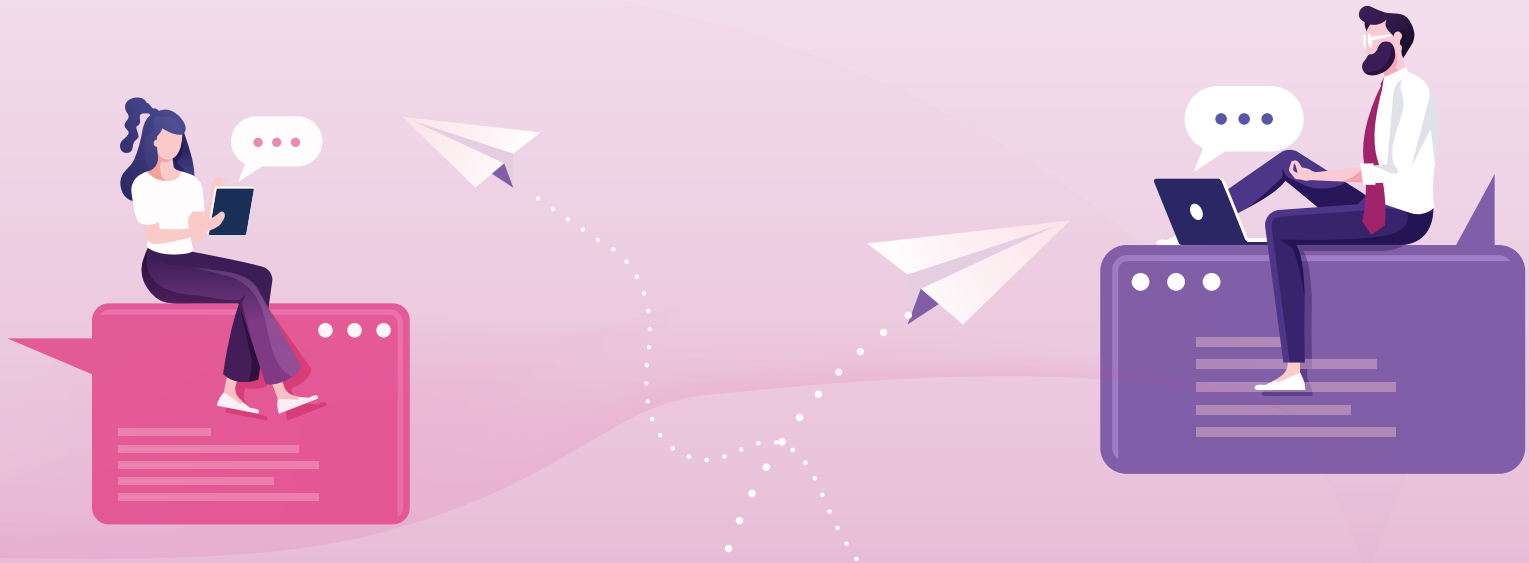
Participants Will Explore:

Great Communication Starts with Strong Interpersonal and Listening Skills: Effective communicators build trust through empathy, respect, authenticity, self-awareness, and active listening. By focusing on others and strengthening key people skills, they create positive interactions and stronger professional relationships.

Communication Improves When You Understand and Adapt to Others: Successful communication requires understanding different perspectives, priorities, communication styles, and personality preferences. Adjusting your approach to match the needs of others helps reduce misunderstandings and build stronger rapport.

Verbal and Nonverbal Communication Work Together to Shape Every Message: Body language, listening, tone, silence, and audience awareness all influence how messages are received. Great communicators intentionally manage both spoken and unspoken signals to improve clarity, credibility, and engagement.

Professional Relationships, Feedback, and Difficult Conversations Drive Long-Term Success: The ability to give and receive feedback, navigate difficult situations, respond constructively to criticism, build trust, and communicate with professionalism helps individuals strengthen relationships, influence others, and advance their careers.



Full Day or Half Day

BtoC SOLUTIONS

Writing & Grammer That Builds Credibility

Participants Will Explore:

Professional Credibility Depends on Clear, Error-Free Communication: Written communication reflects attention to detail, professionalism, and credibility. By strengthening grammar, spelling, punctuation, and proofreading skills, participants learn how to create polished documents that build confidence and leave a positive impression.

Effective Proofreading Requires Accuracy, Discipline, and a Proven Process: Participants learn practical techniques for identifying typographical errors, proofreading numbers and details, improving accuracy, and reviewing their own work more effectively. The course emphasizes systematic approaches that reduce mistakes while improving efficiency.

Strong Grammar and Proper Usage Improve Clarity and Impact: The course explores essential grammar principles including sentence construction, subject-verb agreement, pronoun usage, active voice, capitalization, punctuation, and commonly misused words. These skills help ensure messages are clear, professional, and easy to understand.

Consistent Writing Habits Lead to Long-Term Communication Excellence: Participants develop practical strategies for improving spelling, editing, reviewing documents, and maintaining high standards across all written communications. The result is greater confidence, fewer errors, and stronger business writing skills that can be applied immediately in the workplace.



Full Day or Half Day

BtoC SOLUTIONS

Beyond Bullet Points

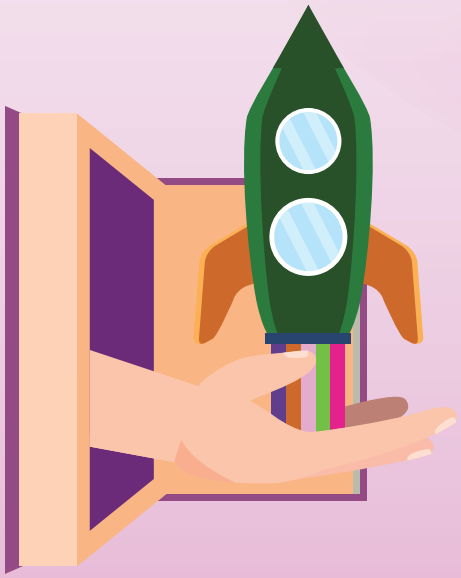
Participants Will Explore:

Great Presentations Tell Stories, Not Just Share Information: Effective presentations are designed to create impact, not simply deliver facts. By organizing content around a compelling story, presenters build emotional connections, capture attention, and make their message more memorable and persuasive.

Visual Storytelling Transforms Complex Ideas into Clear, Engaging Messages: Beyond Bullet Points teaches participants to move beyond text-heavy slides and bullet lists by using visuals, simplicity, and storytelling techniques that improve understanding, retention, and audience engagement. The focus is on one clear idea at a time, supported by purposeful visuals that reinforce the message.

A Structured Story Framework Creates Clarity and Flow: Participants learn how to build presentations using a proven story structure that includes a hook, relevance, challenge, desire, and roadmap. They then organize content through storyboards, anchor points, explanations, and supporting evidence to guide audiences through a logical and persuasive journey.

Successful Delivery Brings the Visual Story to Life: Even the best slides require effective delivery. This course teaches presenters how to rehearse strategically, manage audience attention, eliminate distractions, communicate with authenticity, and confidently deliver presentations that drive action and leave a lasting impression.



11 x 90 min Sessions

BtoC SOLUTIONS

Communicating as a High-Performing Team

Participants Will Explore:

Strong Teams Are Built on Trust, Understanding, and Open Communication: Effective team communication begins with building relationships, understanding different communication styles, addressing concerns openly, and creating an environment of trust and respect. Strong connections among team members reduce misunderstandings and improve collaboration.

Productive Teams Address Conflict, Rumors, and Communication Barriers Directly: High-performing teams confront challenges before they become larger problems. Participants learn practical approaches for resolving conflict, reducing the impact of rumors and gossip, surfacing hidden agendas, and replacing indirect communication with clear and constructive conversations.

Clear Communication Improves Meetings, Decisions, and Accountability: Teams achieve better results when meetings stay focused, responsibilities are clearly defined, decisions are made using effective group techniques, and follow-through expectations are established.
This course provides practical tools for keeping discussions productive and ensuring commitments turn into action.

Effective Communication Extends Beyond the Team to Drive Results and Recognition: Participants learn how to choose the right communication method for different situations, communicate effectively with other teams and stakeholders, manage information flow, and promote team successes in ways that strengthen credibility and organizational impact.



Full Day or Half Day

BtoC SOLUTIONS

The Power of Confident & Clear Communication

Participants Will Explore:

Confident Communication Begins with Self-Awareness and Emotional Intelligence: Great communicators understand their strengths, challenges, emotions, values, and communication habits. By developing emotional intelligence, self-awareness, active listening, empathy, and adaptability, participants learn how to communicate with greater confidence, credibility, and impact.

Confident Leaders Build Trust, Accountability, and Stronger Teams: Effective communication is a critical leadership skill that improves morale, strengthens relationships, increases productivity, supports decision-making, builds trust, and helps managers create high-performing teams. Participants learn how confident communication influences workplace culture and organizational success.

Assertive Communication Creates Clarity, Respect, and Better Outcomes: Participants learn to move beyond passive, aggressive, and passive-aggressive communication styles and develop an assertive approach that balances confidence with empathy. Through managing emotions, focusing on goals, practicing empathy, and avoiding judgmental language, they improve their ability to handle conversations effectively.

Knowledge, Purpose, and Persuasion Strengthen Communication Influence: Confident communication grows through preparation, practice, and purpose. Participants learn how to communicate with clarity, tell compelling stories, adapt to different audiences, and use logos, ethos, and pathos to build trust, gain support, influence decisions, and inspire action.



Full Day or Half Day

BtoC SOLUTIONS

Building Professional Presence through Communication

Participants Will Explore:

Professional Communication Requires Understanding How Messages Are Sent and Received: Effective communication is more than the words we choose. Successful professionals understand how tone, body language, listening, personality differences, and communication barriers influence how messages are interpreted and acted upon.

Strong Communicators Adapt Their Style to Build Better Relationships: Professionals learn to recognize different communication preferences, including how introverts and extroverts process information and participate in conversations. Adapting communication styles helps create stronger relationships, improve collaboration, and increase mutual understanding.

Active Listening and Assertive Communication Strengthen Trust and Influence: The ability to listen with empathy, ask thoughtful questions, communicate with confidence, and express ideas respectfully helps professionals build trust, reduce misunderstandings, and navigate workplace conversations more effectively.

Professional Presence Enhances Credibility in Meetings, Presentations, and Virtual Settings: Participants learn how vocal delivery, body language, feedback conversations, video conferencing etiquette, and presentation techniques shape professional image and influence. Strong communication habits help individuals project confidence, engage others, and communicate their message more effectively.



Full Day or Half Day

BtoC SOLUTIONS

Writing Emails That Get Results

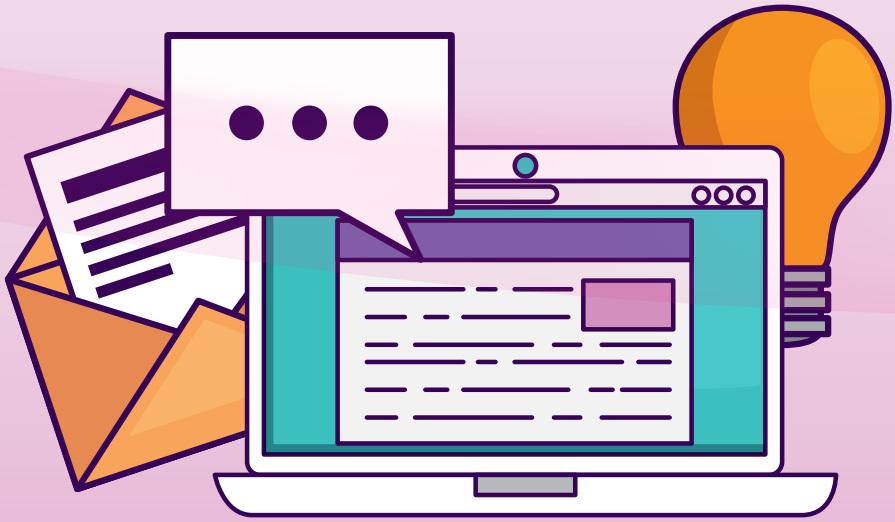
Participants Will Explore:

Professional Emails Drive Credibility, Productivity, and Business Results: Email remains one of the most widely used business communication tools, and the quality of written communication directly impacts credibility, visibility, promotability, and professional relationships. Participants learn how to create messages that are clear, purposeful, and action-oriented.

Effective Emails Start with Audience, Purpose, and Clear Outcomes: Strong email communication begins by understanding the audience, defining the desired result, and organizing information around the actions the recipient needs to take. Participants learn how to write reader-centered messages that improve response rates and reduce misunderstandings.

Structure, Brevity, and Professional Tone Improve Communication Impact: The course teaches practical strategies for writing effective subject lines, improving readability, organizing content, choosing appropriate formatting, and maintaining a professional tone. Participants learn how to make emails easier to read, faster to understand, and more likely to achieve their intended purpose.

Professional Email Habits Reduce Risk and Strengthen Workplace Relationships: Participants learn how to avoid common email mistakes, prevent misinterpretation, manage responses appropriately, use CC and BCC effectively, proofread carefully, protect confidential information, and practice strong email etiquette that builds trust and professionalism.



Full Day or Half Day

BtoC SOLUTIONS

Phone Skills That Build Loyalty

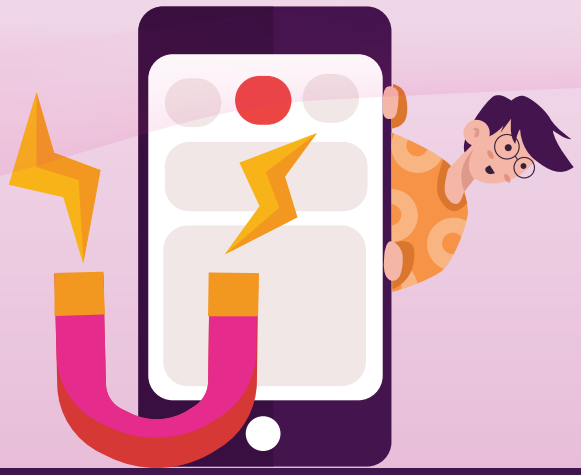
Participants Will Explore:

Every Phone Call Shapes the Customer's Perception of Your Organization: The telephone is often a customer's first interaction with an organization, making every conversation an opportunity to strengthen relationships, build trust, and positively influence the customer experience. Participants learn how their communication directly impacts customer loyalty, retention, and organizational success.

Exceptional Service Begins with Listening, Empathy, and Problem Solving: Participants develop practical techniques for understanding customer needs, gathering information, demonstrating empathy, managing emotions, and confidently guiding conversations toward solutions. The course emphasizes helping customers feel understood before attempting to resolve their concerns.

Different Customer Personalities Require Different Communication Approaches: Not every customer communicates in the same way. Participants learn how to recognize common customer behavior styles, adapt their communication techniques, build rapport more effectively, and successfully handle challenging conversations with confidence and professionalism.

Proactive Service Creates Loyalty and Prevents Customer Dissatisfaction: The course teaches strategies for turning complaints into opportunities, gathering customer feedback, continuously improving service, and creating systems that identify issues before they become problems. Participants learn how proactive communication and customer-focused thinking can transform dissatisfied customers into loyal advocates.



Full Day or Half Day

BtoC SOLUTIONS

Event Planning Essentials

Participants Will Explore:

Successful Workshops Begin with Clear Goals and Thorough Planning: Effective event planning starts with understanding the purpose of the workshop, defining desired outcomes, and aligning logistics to support participant needs. Participants learn how thoughtful planning contributes to a successful attendee experience and a more effective event.

Attention to Logistics Creates a Smooth and Professional Experience: From scheduling and venue considerations to managing resources, communications, and event details, successful workshop planners anticipate challenges and create systems that ensure the event runs efficiently from start to finish.

Engaging Participants Is Essential to Workshop Success: A well-planned workshop goes beyond logistics by creating meaningful engagement opportunities for attendees. Participants learn how to structure activities, maintain participation, encourage interaction, and keep energy levels high throughout the event.

Continuous Evaluation and Improvement Strengthen Future Events: Great event planners gather feedback, evaluate outcomes, identify opportunities for improvement, and apply lessons learned to future workshops. By continuously refining the planning process, organizations can deliver increasingly valuable and impactful events.



Full Day or Half Day

BtoC SOLUTIONS

Building Stronger Workplace Relationships

Participants Will Explore:

Strong Interpersonal Skills Build Trust, Influence, and Professional Success: Effective interpersonal communication strengthens relationships, supports leadership, increases influence, and contributes to career growth. Participants learn how people skills, communication habits, and relationship-building behaviors impact both personal and professional success.

Self-Awareness, Listening, and Adaptability Improve Every Interaction: Participants develop core interpersonal skills including active listening, empathy, respect, clarity, and self-awareness. The course focuses on understanding different perspectives, adapting communication styles, reducing communication barriers, and building stronger connections with others.

Professional Presence and Communication Style Shape First Impressions: The course teaches how body language, tone of voice, listening skills, confidence, and communication style influence perceptions and credibility. Participants learn practical techniques for creating positive first impressions, strengthening rapport, and communicating with greater confidence and professionalism.

Interpersonal Effectiveness Helps Navigate Difficult Situations and Strengthen Relationships: Participants learn strategies for managing conflict, handling feedback, setting boundaries, navigating difficult personalities, building trust, creating psychological safety, and maintaining productive workplace relationships. The course emphasizes practical tools that can be applied immediately to improve communication and collaboration.



Full Day or Half Day

BtoC SOLUTIONS

Writing Effective Policies and Procedures

Participants Will Explore:

Well-Written Policies and Procedures Create Consistency and Accountability: Policies and procedures provide the foundation for consistent decision-making, operational efficiency, compliance, and accountability. Participants learn how clear documentation helps organizations establish expectations, reduce confusion, and support long-term success.

Effective Documents Begin with Clear Purpose, Structure, and Audience Awareness: Strong policies and procedures are designed around the needs of the people who will use them. Participants learn how to organize information logically, define responsibilities, establish standards, and write content that is easy to understand and follow.

Clear, Concise Writing Improves Adoption and Reduces Errors: The course focuses on writing techniques that eliminate ambiguity, simplify complex information, and improve readability. Participants learn how to create documents that communicate requirements clearly and help employees perform tasks correctly and consistently.

Review, Maintenance, and Continuous Improvement Keep Documents Relevant: Policies and procedures must evolve as organizations change. Participants learn best practices for reviewing, updating, communicating, and maintaining documentation so it remains accurate, useful, and aligned with business objectives.



Full Day or Half Day

BtoC SOLUTIONS

Service That Builds Loyalty

Participants Will Explore:

Exceptional Service Begins by Seeing Every Interaction Through the Customer's Eyes: Great service starts with understanding customer expectations, creating positive first impressions, and recognizing that every interaction shapes how customers perceive both the individual and the organization. Participants learn how customer-focused thinking drives loyalty, trust, and long-term business success.

Strong Communication Skills Build Trust and Strengthen Customer Relationships: Exceptional customer service depends on effective verbal and nonverbal communication, active listening, empathy, rapport building, and adapting communication styles to meet customer needs. Participants learn how to reduce misunderstandings, uncover concerns, and create more meaningful customer interactions.

Customer Loyalty Is Earned Through Consistency, Value, and Personalized Service: Building lasting customer relationships requires more than solving problems. Participants learn how to establish trust, make customers feel valued, exceed expectations, create memorable experiences, and deliver service that keeps customers returning and recommending the organization to others.

Handling Complaints Effectively Turns Challenges Into Growth Opportunities: Exceptional service professionals know how to communicate assertively, manage difficult situations, resolve complaints professionally, recover customer trust, and transform feedback into continuous improvement. Participants learn practical techniques for turning service problems into opportunities to strengthen customer relationships.



Full Day or Half Day

BtoC SOLUTIONS

Leading More Productive Meetings

Participants Will Explore:

Productive Meetings Begin with a Clear Purpose and the Right Preparation: Effective meetings are built around a defined objective, a structured agenda, the right participants, and clear expectations. Participants learn how to determine when a meeting is truly necessary, identify who should attend, and create the conditions for productive discussions and decision-making.

Strong Meeting Leadership Keeps Discussions Focused and Moving Forward: Successful meeting leaders manage time effectively, guide participation, keep discussions aligned to the agenda, and create an environment where ideas, problem-solving, and decision-making can occur efficiently. Participants learn practical facilitation techniques that improve engagement and meeting outcomes.

Communication Skills Drive Better Collaboration and Decision-Making: High-quality meetings depend on active listening, effective questioning, constructive discussion, and the ability to encourage participation from all attendees. Participants learn techniques for soliciting ideas, managing different personality types, building consensus, and reducing barriers that limit group effectiveness.

Continuous Evaluation Improves Meeting Effectiveness and Accountability: The most productive organizations treat meetings as an ongoing process of improvement. Participants learn how to document outcomes, capture action items, evaluate meeting performance, manage follow-through, and apply lessons learned to create more efficient and results-oriented meetings



Full Day or Half Day

BtoC SOLUTIONS

Build Rapport & Work Well with Others

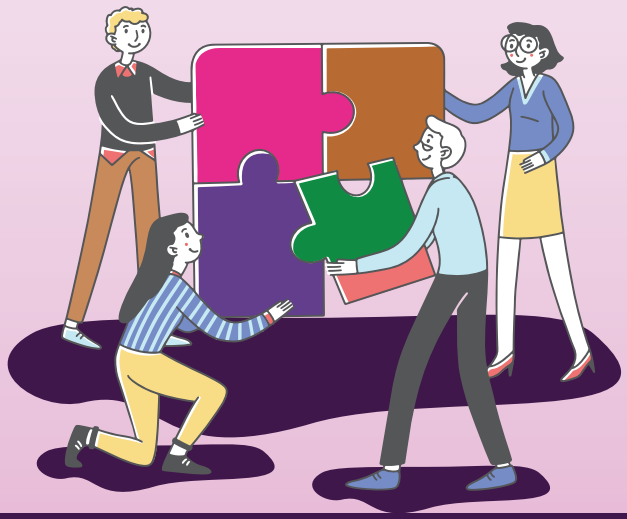
Participants Will Explore:

Strong Relationships Begin with Understanding and Adapting to Different People: Building rapport starts with recognizing that people communicate, make decisions, respond to challenges, and process information differently. Participants learn how to identify behavioral styles, adapt their communication approach, and create stronger connections with a wide variety of personalities.

Assertive Communication Builds Trust, Cooperation, and Respect: The course teaches practical techniques for communicating confidently and tactfully through assertive communication, active listening, "I" language, effective questioning, and professional conversation skills. Participants learn how to express needs clearly while maintaining positive working relationships.

Conflict Resolution and Collaboration Create Better Workplace Outcomes: Participants learn how to prevent unnecessary conflict, navigate difficult situations, understand opposing viewpoints, negotiate win-win solutions, and approach disagreements in ways that strengthen relationships rather than damage them. The focus is on cooperation, problem-solving, and achieving productive outcomes.

Personal Presence and Professional Credibility Enhance Influence: Successful professionals build influence through credibility, emotional intelligence, adaptability, diversity awareness, networking skills, and a strong professional presence. Participants learn practical strategies for creating positive first impressions, strengthening their personal brand, and building confidence in professional interactions.



Full Day or Half Day

BtoC SOLUTIONS

Tactful & Professional Communication Skills

Participants Will Explore:

Effective Communication Starts with Listening, Understanding, and Intentional Dialogue: Strong communicators focus on understanding before responding. Through active listening, thoughtful questioning, open dialogue, and attention to the listener's needs, participants learn how to reduce misunderstandings, improve relationships, and create more meaningful conversations.

Emotional Intelligence Helps Maintain Professionalism in Difficult Situations: Communication is most effective when individuals can manage their own emotions while responding constructively to the emotions of others. Participants learn techniques for maintaining composure, showing empathy, de-escalating conflict, and communicating clearly during challenging conversations.

Clear, Direct, and Respectful Communication Builds Trust and Credibility: The course teaches practical strategies for delivering feedback, addressing difficult situations, communicating with tact, using appropriate body language, writing effective messages, and expressing ideas with professionalism and confidence. Participants learn how to communicate honestly while preserving positive working relationships.

Professional Influence Comes from Adaptability, Respect, and Positive Communication: Participants learn how to work effectively with different personalities, communicate across diverse groups, influence outcomes, gain buy-in, build trust, and frame messages in ways that encourage cooperation and action. The result is stronger workplace relationships and greater communication effectiveness at every level of the organization.



2 Days

BtoC SOLUTIONS

Designing and Delivering Impactful Training

Participants Will Explore:

Great Training Begins with Identifying the Right Need and Defining Clear Objectives: Exceptional trainers understand that training is not always the solution. Participants learn how to conduct needs assessments, identify performance gaps, define measurable learning objectives, and ensure training initiatives are aligned with organizational goals and desired outcomes.

Adult Learners Learn Best When Training Is Relevant, Engaging, and Practical: Successful trainers understand the unique characteristics of adult learners and design experiences that address different learning styles, levels of experience, motivations, and workplace realities. Participants learn techniques for creating learner-centered training that drives retention, engagement, and real-world application.

Professional Trainers Deliver Content with Confidence, Interaction, and Impact: The course provides practical strategies for designing effective course materials, creating engaging learning environments, using visual aids effectively, facilitating participation, building rapport, managing group dynamics, and delivering content with professionalism and credibility.

Training Success Is Measured by Performance Improvement and Lasting Results: Great training extends beyond the classroom. Participants learn how to reinforce learning through follow-up activities, coaching, action plans, evaluation methods, stakeholder engagement, and transfer strategies that help learners apply new skills and improve workplace performance.



Full Day or Half Day

BtoC SOLUTIONS

The Art & Science of Guest Recovery

Participants Will Explore:

A Service Failure Does Not Have to End the Relationship: The way an organization responds after something goes wrong often shapes the guest's lasting impression more than the original problem. Participants learn why speed, fairness, empathy, and a sense of control are central to an effective recovery.

The Art of Recovery Requires Presence, Empathy, and Judgment: No script fits every guest or situation. Employees practice managing their own reactions, acknowledging the guest's experience, adapting their tone, and choosing language that feels sincere while maintaining professionalism and appropriate boundaries.

The Science of Recovery Provides a Reliable Process: Participants learn a practical sequence for stabilizing the interaction, clarifying the issue, identifying an appropriate solution, setting expectations, documenting the outcome, and following through. A consistent process helps employees respond confidently even under pressure.

Strong Recovery Creates Learning as Well as Resolution: Resolving the immediate concern is only part of the work. The workshop shows employees and leaders how to capture recurring issues, communicate across departments, and use guest feedback to reduce future failures while strengthening trust and loyalty.



Half Day

BtoC SOLUTIONS

The Art of Delivering Discretionary Effort

Participants Will Explore:

Discretionary Effort Is the Difference Guests Remember: Standards define the expected level of service, but memorable hospitality is created when employees choose to contribute something more. Participants explore the behaviors that separate simple task completion from genuine care and meaningful guest impact.

Purpose and Empathy Inspire People to Do More: Extra effort cannot be sustained through rules alone. Employees are more willing to act when they understand why the work matters, recognize the effect they can have, and feel a personal connection to the guest's experience.

Empowerment Turns Good Intentions into Action: Employees need confidence, sound judgment, and clear boundaries to act in the moment. Through practical scenarios, participants learn how to anticipate needs, solve small problems, collaborate across departments, and create thoughtful moments without waiting to be told.

Leaders Create the Conditions for Exceptional Effort: Discretionary effort grows in cultures where expectations are clear, initiative is supported, and meaningful contributions are recognized. The workshop connects individual choices with the leadership habits and team environment that make exceptional service repeatable.



Half Day

BtoC SOLUTIONS

The Art of Making Guests Feel Seen, Heard & Valued

Participants Will Explore:

Exceptional Hospitality Begins by Seeing the Individual: Participants learn to recognize the person behind the transaction by using genuine presence, careful observation, and thoughtful personalization. These skills help employees identify both expressed and unspoken needs throughout the guest journey.

Guests Feel Heard When Employees Listen with Intention: Active listening, well-chosen questions, emotional awareness, and clear confirmation help employees understand what matters most. Participants practice conversations that reduce assumptions, build trust, and create confidence that the guest's message will lead to action.

Guests Feel Valued through Ownership and Follow-Through: Respect is demonstrated through reliable action. Employees learn how to protect the guest's time, personalize the response, coordinate effective handoffs, and remain accountable until the request or concern has been fully addressed.

Seen, Heard, and Valued Becomes a Complete Service Mindset: The full-day experience brings the three principles together through discussion, reflection, and hospitality-based scenarios. Participants leave with practical behaviors they can use immediately to strengthen connection, loyalty, service consistency, and the overall guest experience.



Full Day or Half Day

BtoC SOLUTIONS

The Art of Making Hospitality Guests Feel Heard

Participants Will Explore:

Listening Is One of Hospitality's Most Powerful Service Skills: Guests often reveal what they need through both their words and the way they deliver them. Participants learn to slow down, remain present, and listen without interrupting, defending, or rushing toward a solution.

The Right Questions Create Clarity and Confidence: Strong employees do not assume they understand. They use thoughtful questions, confirmation, and paraphrasing to uncover the real need, reduce misunderstandings, and show guests that their concerns and preferences have been taken seriously.

Tone and Emotion Are Part of the Message: What a guest feels may be as important as what the guest says. Participants practice recognizing emotional cues and responding with empathy, composure, and language that validates the experience without making promises they cannot keep.

Closing the Loop Proves That Listening Led to Action: Guests feel heard when communication produces a visible response. The workshop emphasizes accurate handoffs, timely updates, clear expectations, and follow-through so requests do not disappear after the initial conversation.



2 Hours

BtoC SOLUTIONS

The Art of Making Hospitality Guests Feel Seen

Participants Will Explore:

Every Guest Wants to Be Recognized as an Individual: Hospitality becomes personal when employees move beyond transactions and acknowledge the person in front of them. Participants learn how eye contact, a warm welcome, appropriate name use, and genuine presence can quickly communicate that a guest matters.

Observation Reveals What Guests May Never Say: The best service professionals notice body language, pace, tone, special occasions, family dynamics, and other contextual cues. By becoming more observant, employees can anticipate needs and respond in ways that feel thoughtful rather than scripted.

Personalization Turns Ordinary Interactions into Memorable Moments: Small details can transform a routine encounter. Participants practice using available guest information, remembered preferences, and situational awareness to tailor service while remaining natural, respectful, and appropriate.

Feeling Seen Builds Trust, Comfort, and Connection: Guests are more likely to relax, engage, and return when they feel recognized. This workshop gives employees practical ways to create authentic moments of connection across the guest journey, from the first welcome through the final farewell.



2 Hours

BtoC SOLUTIONS

The Art of Making Hospitality Guests Feel Valued

Participants Will Explore:

Guests Feel Valued When Service Communicates Respect: Courtesy is only the beginning. Participants explore how respect for a guest's time, preferences, expectations, and individual circumstances creates a stronger sense of care and reinforces the value of choosing the organization.

Thoughtful Gestures Carry More Weight Than Expensive Ones: Meaningful service often comes from small, well-timed actions. Employees learn to identify simple opportunities to make an interaction easier, more comfortable, or more personal without relying on costly amenities or giveaways.

Ownership Shows Guests That Their Experience Matters: Passing a request along is not the same as taking responsibility for it. Participants practice clear communication, proactive follow-through, and effective handoffs that demonstrate commitment and prevent guests from having to repeat themselves or chase a resolution.

Valued Guests Become Loyal Guests and Advocates: When guests believe their business and their experience genuinely matter, they are more likely to return, recommend the organization, and forgive occasional imperfections. The workshop connects everyday employee behaviors to long-term loyalty and reputation.



2 Hours

BtoC SOLUTIONS



Excel, Data & Financial Skills

Introduction to Microsoft Excel

Participants Will Explore:

Excel Provides a Powerful Foundation for Working with Data: Microsoft Excel is one of the most widely used tools for organizing, managing, analyzing, and sharing information. Participants learn how Excel helps transform raw data into useful business insights while improving productivity and decision-making.

Building Strong Spreadsheet Fundamentals Creates Long-Term Success: This course introduces the core concepts needed to work confidently in Excel, including creating, saving, sharing, and managing worksheets. Participants develop the foundational skills required to build and maintain accurate spreadsheets.

Formulas, Functions, and Formatting Improve Accuracy and Efficiency: Participants learn how to perform common calculations, create basic formulas, use essential functions, apply formatting, and utilize conditional formatting to make data easier to understand and analyze.
These skills help improve both accuracy and effectiveness when working with spreadsheets.

Workbook Management Supports Professional and Productive Workflows: The course covers workbook management techniques including printing, workbook properties, options, and templates. Participants gain practical skills for creating professional spreadsheets that are easy to use, share, and maintain.



2 Days

Create my Excel℠

Microsoft Excel Basics

Participants Will Explore:

Excel Provides the Foundation for Organizing, Managing, and Analyzing Data: Microsoft Excel helps users work more efficiently by organizing information, performing calculations, analyzing data, and creating professional reports. Participants learn how Excel can become a powerful productivity tool for both business and personal use.

Success Starts with Building Well-Designed Worksheets from the Beginning: Effective spreadsheets require thoughtful planning, proper worksheet design, organized data structures, and efficient workbook management. Participants learn proven techniques for creating worksheets that are easy to maintain, update, and use.

Formulas, Functions, and Data Tools Transform Information into Insights: The course introduces the core calculation and analysis features of Excel, including formulas, functions, sorting, filtering, AutoFill, and data organization techniques. Participants learn how to automate common calculations and gain more value from their data.

Professional Formatting, Charts, and Automation Improve Productivity and Communication: Participants learn how to create polished worksheets using formatting tools, charts, printing features, and basic macros. These capabilities help users communicate information more effectively, reduce repetitive work, and produce professional results with greater efficiency.



3 Hours

Create my Excel℠

Microsoft Excel Associate Certification

Participants Will Explore:

Build a Strong Foundation Across the Core Pillars of Excel Competency: This course provides a comprehensive introduction to Microsoft Excel by focusing on the four foundational areas of proficiency: worksheet and workbook formatting, data management, introductory formulas and functions, and data visualization. Participants develop the practical skills needed to use Excel effectively in everyday business environments.

Learn to Organize, Manage, and Analyze Data with Confidence: Participants learn how to navigate and format worksheets, manage and manipulate data, create and use tables, define named ranges, apply sorting and filtering techniques, and visually summarize information to support better decision-making.

Develop Essential Formula, Function, and Reporting Skills: The course introduces foundational Excel calculations, including formulas, descriptive statistical functions, and text functions. Participants gain the skills needed to automate calculations, improve accuracy, and extract meaningful insights from their data.

Prepare for Microsoft Excel Associate Certification and Career Growth: Structured around Microsoft's Excel Associate certification objectives, this program helps participants build the knowledge and confidence needed to pursue certification. Dedicated preparation sessions, practice activities, and certification-focused instruction support success on the certification exam and strengthen workplace credibility.



18 x 90 Minute Sessions + Certification

Create my Excel℠

Microsoft PowerPoint Associate Certification

Participants Will Explore:

Build a Strong Foundation in Professional Presentation Design and Delivery: This course is designed to help participants develop the core skills needed to create, manage, format, and deliver professional PowerPoint presentations. Through hands-on learning, participants build confidence using the tools and techniques commonly required in business, education, and professional environments. Based on the Microsoft Office Specialist PowerPoint Associate certification objectives.

Learn to Create, Organize, and Enhance Presentation Content Effectively: Participants learn how to create presentations, manage slides, apply themes, format content, work with text and graphics, and organize information in ways that improve clarity, visual appeal, and audience understanding. These foundational skills help transform ideas into polished presentations.

Use Visual Elements to Communicate Information with Greater Impact: The course explores how to work with images, SmartArt, charts, tables, diagrams, animations, and multimedia features to create engaging presentations that communicate ideas more effectively and support audience retention.

Prepare for Microsoft PowerPoint Associate Certification and Professional Success: Aligned to Microsoft's certification standards, this course prepares participants to demonstrate competency in PowerPoint while building practical skills that can be applied immediately in the workplace. Certification preparation strengthens confidence, validates expertise, and enhances professional credibility.



18 x 90 Minute Sessions + Certification

Create *my* PowerPoint℠

Microsoft Outlook Associate Certification

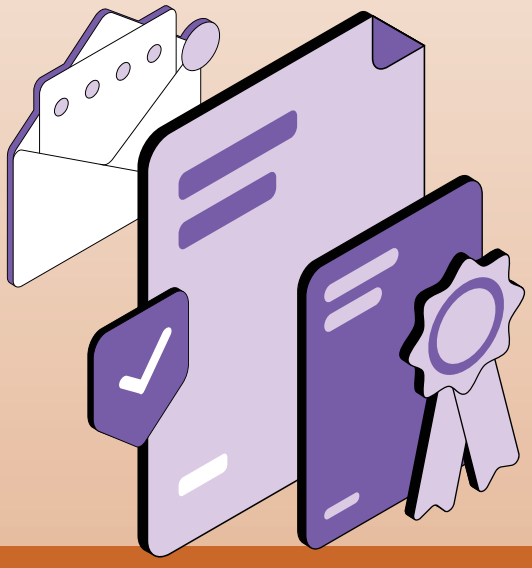
Participants Will Explore:

Build a Strong Foundation in Email, Calendar, and Contact Management: This course helps participants develop the core skills required to use Microsoft Outlook effectively in a professional environment. Learners gain confidence managing email, calendars, contacts, and tasks while improving organization, productivity, and communication efficiency.

Learn to Manage Communications and Information More Efficiently: Participants learn how to organize mailboxes, manage messages, streamline communication workflows, schedule appointments and meetings, and maintain professional correspondence. These skills help users reduce distractions and stay focused on priorities.

Master Outlook Features That Improve Productivity and Collaboration: The course covers key Outlook capabilities including calendar management, task tracking, contact management, categorization, automation tools, and information organization techniques that help users work more effectively with colleagues and clients.

Prepare for Microsoft Outlook Associate Certification and Professional Growth: Aligned with Microsoft Office Specialist certification objectives, this course prepares participants to demonstrate competency in Outlook while building practical workplace skills. Certification validates proficiency, increases confidence, and supports professional development opportunities.



13 x 90 Minute Sessions + Certification

BtoC SOLUTIONS

Microsoft Word Associate Certification

Participants Will Explore:

Build a Strong Foundation in Professional Document Creation and Management: This course develops the core skills required to create, format, organize, and manage professional documents using Microsoft Word. Participants learn how to work confidently with the tools and features most commonly used in business environments while building proficiency aligned to Microsoft Office Specialist certification objectives.

Learn to Create Well-Structured, Consistent, and Professional Documents: Participants learn how to manage document settings, organize information effectively, apply formatting standards, work with styles, and create documents that are visually consistent, easy to navigate, and professional in appearance. These skills help improve both productivity and document quality.

Use Advanced Word Features to Improve Efficiency and Accuracy: The course explores tools for working with tables, lists, references, graphics, collaboration features, and document automation capabilities. Participants learn how to streamline document creation processes while improving accuracy, consistency, and presentation quality.

Prepare for Microsoft Word Associate Certification and Career Advancement: Aligned with Microsoft's Word Associate certification objectives, this course helps participants build the knowledge and confidence needed to pursue certification while strengthening workplace productivity. Certification validates Word proficiency and demonstrates a commitment to professional development and technical excellence.



18 x 90 Minute Sessions + Certification

BtoC SOLUTIONS

Microsoft Excel Expert Certification

Participants Will Explore:

Advanced Excel Skills Improve Efficiency, Accuracy, and Decision-Making: This course is designed for professionals who use Excel regularly and want to deepen their expertise in advanced workbook management, data analysis, formulas, automation, and reporting. Participants develop the advanced skills necessary to solve complex business challenges and work more effectively with data.

Master Advanced Data Management, Analysis, and Automation Techniques: Participants learn advanced workbook options and settings, collaboration features, data validation, conditional formatting, built-in analysis tools, and basic macros that help streamline processes, improve data quality, and increase productivity.

Build Expertise with Advanced Formulas, Functions, and Data Visualization: The course provides comprehensive instruction in logical functions, lookup functions, date and time functions, financial formulas, PivotTables, charts, and advanced reporting techniques. Participants learn how to transform large amounts of data into meaningful insights and actionable information.

Prepare for Microsoft Excel Expert Certification and Demonstrate Professional Competency: Structured around Microsoft's Excel Expert certification objectives, this program prepares participants to validate their advanced Excel skills through certification. Certification preparation, practice activities, and exam-focused learning help strengthen confidence, credibility, and career opportunities.



32 x 90 Minute Sessions + Certification

BtoC SOLUTIONS

Beyond Bullet Points & MOS PowerPoint Certification

Participants Will Explore:

Master PowerPoint While Developing Professional Presentation Expertise: This course combines Microsoft PowerPoint Associate certification preparation with advanced presentation design techniques, helping participants build the technical skills needed to create, manage, and deliver professional presentations with confidence.

Transform Presentations into Persuasive Visual Stories: Beyond mastering PowerPoint features, participants learn how to move beyond traditional bullet-point presentations by applying storytelling principles, audience-centered design, and proven visual communication techniques. These skills help create presentations that are more memorable, engaging, and persuasive.

Build Technical Expertise Across PowerPoint's Most Powerful Features: Participants develop proficiency in managing presentations and slides, formatting text and graphics, working with images, charts, SmartArt, media, transitions, and animations, while learning how to organize and structure content for maximum impact.

Prepare for PowerPoint Associate Certification and Deliver with Confidence: Aligned with Microsoft's PowerPoint Associate certification objectives, the course prepares participants to validate their proficiency through certification while also developing the skills needed to confidently deliver compelling presentations that influence, inform, and inspire audiences.



18 x 2 Hours Sessions

Create *my* PowerPoint℠

Microsoft Excel Data Visualizations

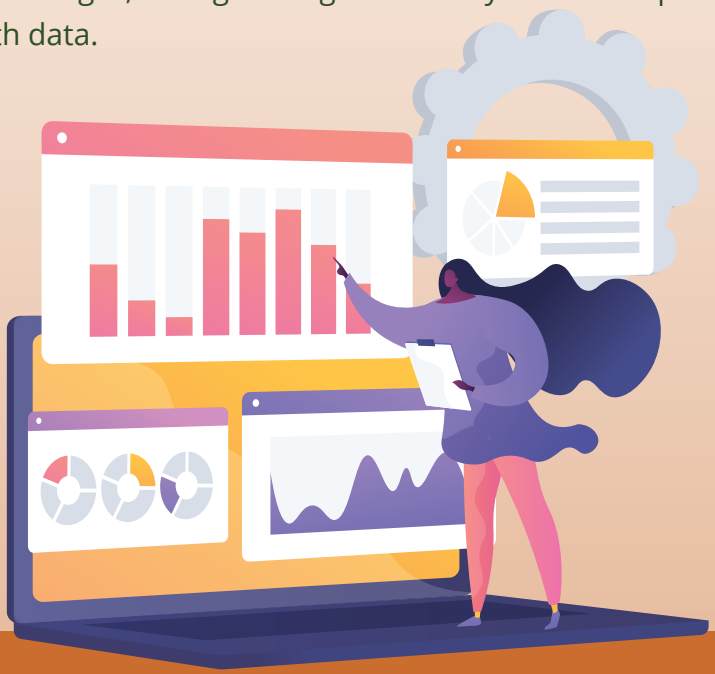
Participants Will Explore:

Effective Data Visualization Transforms Data into Meaningful Stories: Great visualizations do more than display numbers—they help audiences understand trends, patterns, relationships, and opportunities. Participants learn how to use advanced Excel visualization techniques to communicate insights more clearly and support better decision-making.

Advanced Visualization Techniques Create More Impactful Analysis: This course introduces ten advanced data visualization methods designed to elevate reporting and analysis beyond standard charts and graphs. Participants learn how to create visual tools that make complex information easier to understand and more engaging for stakeholders.

Dynamic and Interactive Dashboards Improve Business Intelligence: Participants develop advanced skills using dynamic dashboards, automatic updating charts, scroll and zoom charts, dynamic series selection, and other interactive visualizations that allow users to explore data more effectively and gain deeper insights.

Practical Application Reinforces Long-Term Visualization Success: Through hands-on learning and access to Excel expert office hours, participants apply advanced visualization techniques to real-world business challenges, strengthening their ability to build impactful reports and tell compelling stories with data.



12 x 2 Hours Sessions

BtoC SOLUTIONS

Data Analysis with Excel Pivot Tables

Participants Will Explore:

Pivot Tables Transform Large Data Sets into Meaningful Business Insights: Pivot Tables enable users to quickly summarize, organize, and analyze large amounts of data without complex formulas. Participants learn how to turn raw information into clear insights that support faster and more informed decision-making.

Effective Data Analysis Begins with Proper Data Organization and Structure: Successful Pivot Table reporting depends on clean, organized, and well-structured data. Participants learn best practices for preparing data sources, managing datasets, and creating reliable foundations for accurate analysis and reporting.

Interactive Reporting Helps Users Explore Trends, Patterns, and Performance: The course teaches participants how to build Pivot Tables that filter, group, sort, and summarize information dynamically. These capabilities make it easier to identify trends, compare results, uncover patterns, and answer business questions quickly.

Advanced Pivot Table Features Improve Reporting and Decision-Making: Participants learn how to leverage calculated fields, Pivot Charts, slicers, dashboards, and advanced reporting techniques to create interactive analyses that communicate insights clearly and help stakeholders make better decisions.



2 Days

Create my Excel℠

Creating Dashboards

Participants Will Explore:

Dashboards Turn Data into Clear, Actionable Insights: Effective dashboards transform large volumes of information into visual summaries that help users monitor performance, identify trends, and make better decisions. Participants learn how dashboards provide a single source of truth that makes complex data easier to understand and communicate.

Great Dashboards Begin with Purpose, Audience, and Design: Successful dashboards are built around the needs of the user. Participants learn how to define key metrics, organize information logically, select the right visualizations, and create layouts that focus attention on the most important business insights.

Interactive Visualizations Improve Analysis and Decision-Making: The course teaches participants how to use charts, PivotTables, slicers, filters, and dynamic visual elements to create dashboards that allow users to explore data, identify patterns, and answer business questions quickly and efficiently.

Automation and Dynamic Reporting Increase Efficiency and Accuracy: Participants learn techniques for creating dashboards that update automatically, reduce manual reporting effort, improve consistency, and provide timely information for ongoing performance monitoring and business decision-making.



2 Days

Create my Excel℠

Intermediate Microsoft Excel

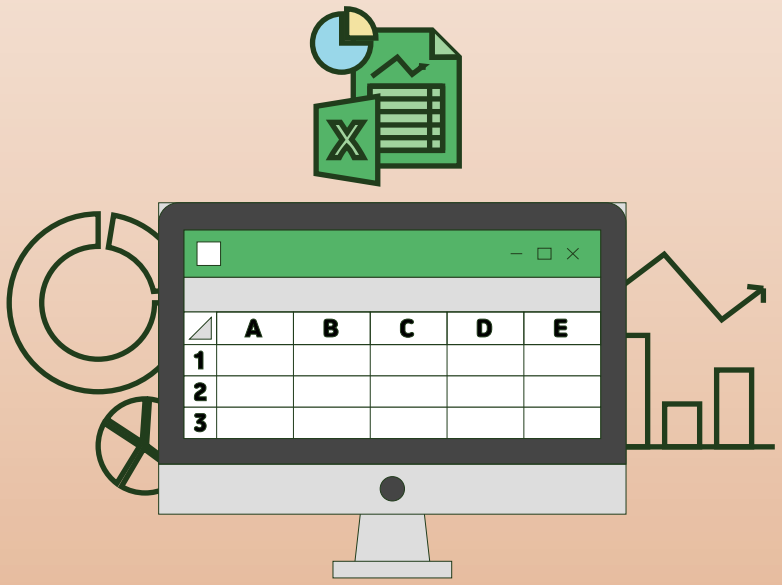
Participants Will Explore:

Advanced Excel Skills Enable Better Analysis and More Informed Decisions: Today's business environment requires professionals to compile, analyze, and present data effectively. This course builds on foundational Excel skills and introduces more advanced tools that help users work with complex data, generate insights, and support data-driven decision-making.

Advanced Functions and Formulas Expand Analytical Capabilities: Participants learn how to use named ranges, logical functions, date functions, and text functions to perform more sophisticated calculations and streamline spreadsheet development. These skills improve accuracy, efficiency, and problem-solving capabilities.

Data Analysis Tools Help Transform Information into Insights: The course teaches participants how to leverage table functions, Quick Analysis tools, custom conditional formatting, and Pivot Tables to organize, summarize, analyze, and interpret large amounts of data more effectively.

Professional Reporting and Visualization Improve Communication Impact: Participants learn how to create and modify charts, build PivotCharts, and present data visually in ways that improve understanding and support decision-making. The result is stronger reporting, clearer communication, and more effective business presentations.



2 Days

Create my Excel℠

How to Plan & Manage a Budget

Participants Will Explore:

Effective Budgeting Aligns Financial Decisions with Organizational Goals: Successful budgets begin with a clear understanding of the organization's mission, objectives, and priorities. Participants learn how budgeting serves as both a planning tool and a management system that helps organizations allocate resources, establish priorities, and achieve desired outcomes.

Strong Budget Development Requires Structure, Forecasting, and Realistic Assumptions: Participants learn a practical budgeting process that includes planning, establishing objectives, building assumptions, forecasting results, preparing projections, and monitoring performance. The course emphasizes creating realistic budgets based on data, trends, and measurable objectives rather than guesswork.

Understanding Costs, Cash Flow, and Financial Performance Improves Decision-Making: The course helps participants understand key budgeting concepts including direct and indirect costs, fixed and variable expenses, cash budgeting, capital expenditures, forecasting, financial analysis, and variance reporting. These tools help managers make better financial decisions and improve resource utilization.

Ongoing Monitoring and Adjustment Keep Budgets Relevant and Effective: Budgeting is not a one-time event but an ongoing management process. Participants learn how to monitor results, analyze variances, adjust plans when conditions change, and use budgeting as a continuous tool for improving performance and organizational success.



Full Day or Half Day

BtoC SOLUTIONS

Data Driven Decision Making

Participants Will Explore:

Better Decisions Begin with Data, Not Assumptions: High-performing organizations use data to reduce uncertainty, identify opportunities, and make more informed decisions. Participants learn how to move beyond intuition by using data to evaluate options, understand trends, and support business recommendations.

Effective Analysis Requires Asking the Right Questions: Successful data-driven decision makers begin by clearly defining objectives, identifying meaningful metrics, and focusing on the information that matters most. Participants learn how to frame business questions that lead to actionable insights rather than simply collecting data.

Data Must Be Organized, Analyzed, and Interpreted to Create Value: Collecting data alone is not enough. Participants learn techniques for analyzing information, identifying patterns, evaluating results, and distinguishing meaningful insights from noise. The course focuses on transforming data into knowledge that supports sound business decisions.

Communicating Insights Drives Action and Organizational Results: The value of data lies in the ability to communicate findings clearly and influence decision-making. Participants learn how to present insights, use visualizations effectively, support recommendations with evidence, and help stakeholders take informed action based on the data.



3 Hours

Create my Excel℠

Easily Master Excel PivotTables

Participants Will Explore:

PivotTables Transform Large Data Sets into Clear, Actionable Insights: Analyzing large amounts of data can be overwhelming, but PivotTables allow users to quickly summarize, organize, and interpret information in meaningful ways. Participants learn how to convert complex spreadsheets into reports that support faster analysis and better decision-making.

Effective Analysis Begins with Well-Prepared Data: A PivotTable is only as effective as its source data. Participants learn best practices for preparing worksheets, organizing data, avoiding common data structure issues, and creating reliable datasets that support accurate reporting and analysis.

Advanced PivotTable Features Reveal Trends, Patterns, and Opportunities: The course teaches participants how to build PivotTables from scratch, group and summarize data, apply calculations, use slicers and timelines, and analyze information from multiple perspectives. These techniques help uncover trends, compare performance, and answer critical business questions.

PivotCharts and Interactive Reporting Improve Data Communication: Participants learn how to create PivotCharts, customize reports, build interactive dashboards with slicers and filters, and present data visually. These capabilities make it easier to communicate findings, share insights, and help stakeholders understand the story behind the data.



3 Hours

Create my Excel℠

Understanding Financial Statements

Participants Will Explore:

Financial Statements Provide the Foundation for Sound Business Decisions: Understanding financial statements begins with learning the language of finance and the role financial information plays in measuring organizational performance. Participants build a strong foundation for interpreting financial data and making more informed business decisions.

The Income Statement and Balance Sheet Reveal Financial Performance and Position: Participants learn how to interpret two of the most important financial documents. The Income Statement and the Balance Sheet. Understanding these reports helps business professionals evaluate profitability, financial health, and operational performance.

Financial Analysis Helps Turn Numbers into Actionable Insights: The course focuses on understanding, analyzing, and using financial statements to identify trends, assess performance, evaluate business conditions, and support strategic decision-making. Participants learn practical techniques for applying financial information to real-world business challenges.

Core Accounting Principles Strengthen Financial Understanding and Business Acumen: Participants gain a working knowledge of Generally Accepted Accounting Principles (GAAP), depreciation, equity, and other key financial concepts. By bringing these elements together, they develop greater confidence in interpreting financial reports and communicating financial information effectively.



Full Day or Half Day

BtoC SOLUTIONS

Powerful Excel Dashboards Primer

Participants Will Explore:

Dashboards Transform Complex Data into Clear, Actionable Insights: A well-designed dashboard provides a one-page visual summary of key metrics and performance indicators, allowing users to quickly monitor results, identify trends, and focus on the information that matters most. Dashboards turn large amounts of data into meaningful business intelligence.

Effective Dashboards Begin with Planning, Purpose, and Audience Focus: Successful dashboards start by determining what information should be displayed and how it should be presented. Participants learn how to identify critical metrics, prioritize information, create layouts, and design dashboards that communicate insights clearly without overwhelming the viewer.

Excel's Visualization Tools Bring Data to Life: The course demonstrates how to combine PivotTables, PivotCharts, sparklines, slicers, conditional formatting, data validation, and dynamic calculations to create interactive dashboards that are visually engaging and easy to use. These tools help users analyze data and explore information from multiple perspectives.

Professional Design Enhances Usability and Decision-Making: Participants learn practical techniques for improving dashboard appearance and functionality through layout design, shapes, color, formatting, hidden support worksheets, dynamic controls, and user-friendly navigation. The result is a polished dashboard that supports better decisions and more effective communication.



3 Hours

Create my Excel℠

Microsoft Excel Beyond the Basics

Participants Will Explore:

Excel Productivity Improves When Users Move Beyond Basic Spreadsheet Skills: This course helps participants work faster and smarter in Excel by strengthening their ability to build, manage, calculate, format, report, protect, and automate workbooks. The materials focus on practical tools that reduce wasted effort and make spreadsheets easier to create, update, and use.

Well-Designed Workbooks Start with Structure, Planning, and Efficient Data Entry: Participants learn how to plan worksheets before building them, use templates, optimize workbook structure, group worksheets, and apply data entry techniques that save time. These skills help users create cleaner workbooks that are easier to manage and less likely to require rework.

Advanced Tools Help Users Analyze, Format, and Report Data More Effectively: The course covers named ranges, subtotals, conditional formatting, formatted tables, text-to-columns, text functions, advanced filters, PivotTables, PivotCharts, chart modifications, and sparklines. These tools help users organize large amounts of information, identify trends, and present data in more useful ways.

Protection, Advanced Functions, and Macros Increase Accuracy and Efficiency: Participants learn how to secure data, apply data validation, use advanced functions such as IF, VLOOKUP, AND, and OR, and automate repetitive tasks with macros. These capabilities help reduce errors, enforce standards, and make recurring Excel work more efficient and reliable.



Full Day or Half Day

Create my Excel℠

Advanced Pivot Table Data Crunching

Participants Will Explore:

Master Advanced Pivot Table Techniques to Unlock Deeper Business Insights: Designed for professionals who regularly work with large datasets, this course takes Pivot Tables beyond the basics by teaching participants how to analyze data more effectively, uncover trends, and generate meaningful insights that support business decision-making.

Build Powerful Analytical Reports Using Advanced Pivot Table Features: Participants learn how to customize Pivot Tables, perform advanced calculations, group and filter data, create Pivot Charts, and analyze information from multiple data sources. These skills help transform raw data into actionable business intelligence.

Leverage Excel's Advanced Data Modeling and Business Intelligence Tools: The course explores Data Models, Power Pivot, cube formulas, Power BI integration, 3D Maps, Power Query, and dashboard sharing techniques. Participants learn how to connect, model, and visualize complex datasets to support more sophisticated analysis and reporting.

Automate, Optimize, and Scale Your Data Analysis Capabilities: Participants advance beyond traditional reporting by learning how Pivot Tables interact with macros, Visual Basic, dynamic arrays, Excel Online, and Power Query. These tools help automate repetitive tasks, improve efficiency, and create scalable reporting solutions for real-world business challenges.



18 x 2 Hours Sessions

Create my Excel℠

Excel Formula & Functions MasterClass

Participants Will Explore:

Advanced Formula Skills Unlock Greater Efficiency and Analytical Power: Designed for daily Excel users, this course helps participants deepen their understanding of advanced formulas and functions to improve productivity, reduce manual work, and generate more meaningful insights from data. Participants learn how to leverage Excel's extensive function library to solve increasingly complex business challenges.

Building Strong Formula Foundations Improves Accuracy and Confidence: Participants learn how to create effective formulas, develop advanced formula structures, troubleshoot errors, and apply best practices that improve spreadsheet reliability and performance. These skills provide a foundation for more sophisticated analysis and modeling.

Advanced Functions Help Transform Data into Actionable Business Insights: The course provides in-depth instruction on text, logical, lookup, informational, math, and date functions. Participants learn how to combine and apply functions effectively to automate calculations, streamline analysis, and answer complex business questions.

Business Modeling Techniques Support Better Decision-Making: Participants learn how to apply formulas and functions to real-world business scenarios including statistical analysis, forecasting, investments, loan calculations, trend analysis, PivotTables, and business modeling tools. These capabilities help transform Excel into a powerful decision-support platform.



25 x 2 Hours Sessions

Create my Excel℠

Next Level Microsoft Excel Power User

Participants Will Explore:

Advanced Excel Skills Help Solve Complex Business Challenges: Designed for experienced Excel users, this course builds on foundational knowledge and introduces advanced tools that help participants solve real-world business problems more efficiently. Participants learn how to leverage Excel's powerful capabilities to improve productivity, accuracy, and decision-making.

Advanced Workbook Management Improves Collaboration and Control: Participants learn how to work with multiple worksheets and workbooks, collaborate more effectively with others, share information securely, and apply workbook and worksheet protection features that improve data integrity and consistency.

Advanced Analysis Tools Improve Data Accuracy and Visibility: The course teaches participants how to use lookup functions, trace precedents and dependents, evaluate formulas, monitor calculations with Watch Windows, and apply data validation techniques to improve spreadsheet reliability and analytical effectiveness.

Automation, Visualization, and Forecasting Drive Better Business Insights: Participants learn how to create macros, visualize information using sparklines and maps, and leverage forecasting tools to identify trends and support forward-looking decision-making. These capabilities help transform spreadsheets into powerful business analysis and reporting tools.



2 Days

Create my Excel℠

Power Excel

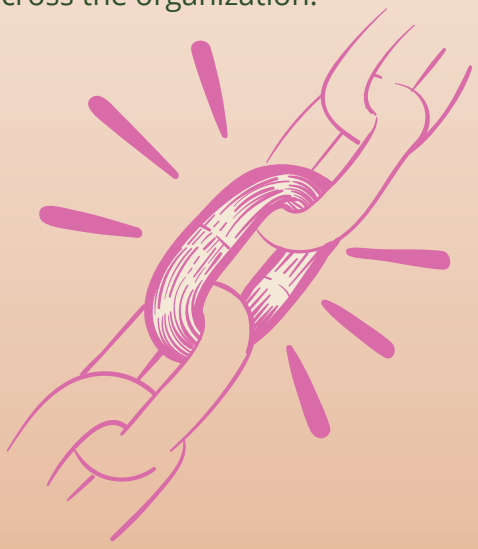
Participants Will Explore:

Move Beyond Standard Spreadsheet Skills to Become an Advanced Excel User: This course is designed for experienced Excel users who want to expand their capabilities and solve more complex business challenges. Participants learn advanced techniques that improve productivity, streamline analysis, automate repetitive tasks, and unlock the full power of Excel's most sophisticated features.

Advanced Formulas, Functions, and Automation Improve Efficiency and Accuracy: Participants learn how to work with advanced calculations, nested functions, lookup functions, data validation, custom functions, macros, and VBA concepts. These tools help automate tasks, reduce errors, and make spreadsheets more dynamic and efficient.

PivotTables and Data Models Transform Data into Actionable Insights: The course teaches advanced PivotTable techniques, data modeling, calculated fields, PivotCharts, and analytical tools that help users summarize large datasets, identify trends, explore relationships, and generate meaningful business intelligence.

Collaboration, Data Sharing, and Reporting Enhance Organizational Impact: Participants learn how to connect to external data sources, collaborate through OneDrive and Excel Web App, share dashboards and reports, and create professional outputs that improve communication and support better decision-making across the organization.



Full Day or Half Day

Create my Excel℠

Advanced Microsoft Excel -Diving Deeper

Participants Will Explore:

Advanced Excel Users Gain More Power Through Automation and VBA: Participants learn how to move beyond recorded macros by exploring the Visual Basic Editor, understanding macro structure, editing VBA code, creating custom macros, using loops and conditional logic, and automating repetitive tasks that increase productivity and efficiency.

Advanced Formulas and Analytical Tools Strengthen Decision-Making: The course teaches participants how to build nested functions, create custom functions, troubleshoot complex formulas, apply advanced data validation, leverage powerful lookup and statistical functions, and use What-If Analysis tools such as Goal Seek, Scenarios, and Solver to evaluate business outcomes.

Advanced PivotTable Techniques Transform Data into Business Intelligence: Participants learn how to work with Excel Data Models, create PivotTables from multiple data sources, drill into summarized information, apply advanced sorting and formatting, create calculated fields and calculated items, and build more meaningful analyses from large datasets.

Data Connectivity, Reporting, and Sharing Expand Excel's Organizational Impact: The course demonstrates how to connect Excel to external data sources, manage data connections, create professional reports, optimize print settings, use custom views, apply security best practices through Trust Center settings, and share information more effectively across the organization.



Full Day or Half Day

Create my Excel℠

Advanced Excel Macros, PivotTables & Charts

Participants Will Explore:

Automation Increases Productivity and Reduces Manual Effort: Participants learn how to use macros to automate repetitive tasks, standardize processes, and improve efficiency across complex spreadsheets. By reducing manual work and minimizing errors, users can focus more time on analysis and decision-making.

Advanced PivotTables Transform Data into Meaningful Business Intelligence: The course teaches participants how to build, customize, and analyze PivotTables that summarize large datasets quickly and effectively. Advanced PivotTable techniques help uncover trends, compare performance, and generate insights that support smarter business decisions.

Powerful Charts Improve Data Visualization and Communication: Participants learn how to create and customize professional charts that communicate data clearly and visually. Through advanced charting techniques, users can highlight key trends, tell a more compelling story with data, and make information easier for stakeholders to understand.

Integrated Reporting Tools Create Dynamic and Actionable Dashboards: By combining macros, PivotTables, and charts, participants develop reporting solutions that are interactive, automated, and easy to maintain. These skills help transform spreadsheets into powerful business tools that support ongoing analysis, monitoring, and decision-making.



Full Day or Half Day

Create my Excel℠



Leadership, Management & Workplace Effectiveness

Leading with Clarity and Confidence

Participants Will Explore:

Assertive Leadership Balances Results with Respect for People: Effective leaders understand that the most productive management style exists between passivity and aggression. Participants learn how to communicate clearly, establish credibility, address challenges directly, and create positive work environments where both performance and relationships can thrive.

Confidence Begins with Self-Awareness, Responsibility, and Personal Accountability: The course explores the foundational principles of assertive leadership, including respect, rights, responsibility, and rational thinking. Participants learn how mindset, beliefs, and personal responsibility influence leadership effectiveness, confidence, decision-making, and professional relationships.

Assertive Communication Improves Collaboration, Trust, and Conflict Resolution: Participants learn practical communication techniques involving words, tone, body language, listening skills, and constructive feedback. These tools help leaders express needs clearly, navigate difficult conversations, handle criticism, manage conflict, and build stronger working relationships while maintaining professionalism and mutual respect.

Practical Leadership Skills Increase Influence and Workplace Effectiveness: The course provides actionable strategies for setting limits, saying no when appropriate, giving and receiving feedback, communicating expectations, recognizing positive performance, and addressing difficult workplace situations. Participants leave with tools they can apply immediately to improve leadership effectiveness and confidence.



Full Day or Half Day

BtoC SOLUTIONS

Ethics, Trust, and Accountability

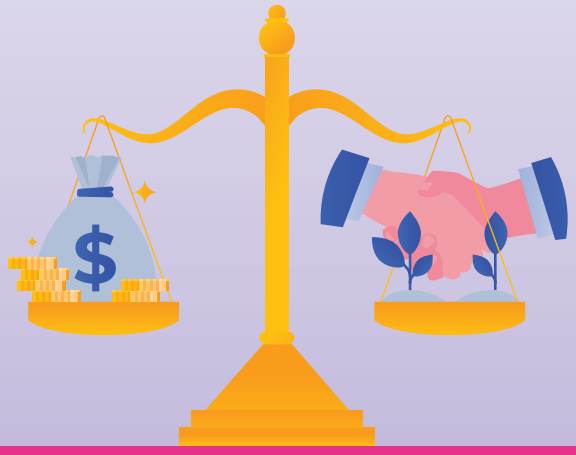
Participants Will Explore:

Ethics Go Beyond Compliance and Shape Every Business Decision: Successful organizations understand that ethical behavior extends beyond simply following laws and regulations. Participants learn the difference between legal and ethical conduct while exploring how values, integrity, and sound judgment guide decision-making throughout the organization.

Creating an Ethical Culture Requires Leadership, Communication, and Accountability: A responsible workforce develops when ethical expectations are clearly communicated, reinforced, and modeled by leaders. Participants learn practical strategies for establishing ethical standards, hiring ethical employees, encouraging open discussion, reinforcing positive behaviors, and creating workplace systems that support responsible decision-making.

Responsible Organizations Build Trust Through Transparency and Ethical Relationships: The course explores ethical responsibilities to employees, customers, shareholders, business partners, government agencies, and the broader community. Participants learn how transparency, fairness, accountability, and corporate social responsibility strengthen trust, protect reputations, and support long-term organizational success.

Ethical Decision-Making Creates Better Outcomes for People and Organizations: Participants learn practical frameworks for evaluating ethical dilemmas, addressing misconduct, resolving conflicts, and making decisions that align with organizational values. Through real-world examples, case studies, and decision-making models, participants develop the confidence to navigate complex situations while maintaining integrity and professionalism.



Full Day or Half Day

BtoC SOLUTIONS

Leading Through Change

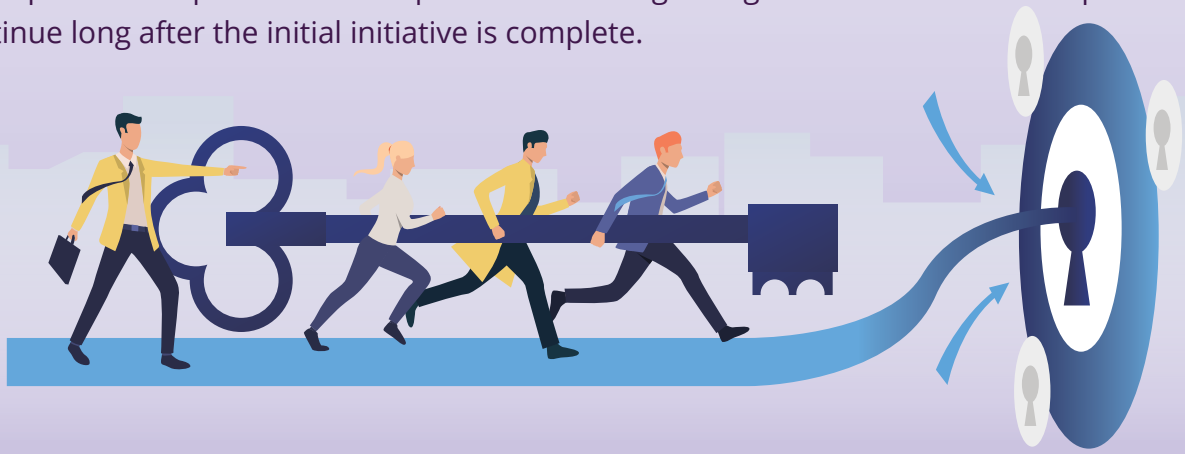
Participants Will Explore:

Successful Change Begins with Creating a Clear Case for Why Change Is Necessary: Organizations experience constant change driven by factors such as competition, technology, market trends, and evolving business needs. Participants learn how to build a sense of urgency, communicate the reasons for change, and help employees understand why change is essential for future success.

People Change One Person at a Time Through Understanding, Inclusion, and Communication: The course emphasizes that change succeeds when leaders understand how individuals respond to change and address fundamental human needs for community, influence, and understanding. Participants learn how to recognize resistance, build commitment, and tailor communication strategies to help employees navigate uncertainty more effectively.

Change Becomes Sustainable When Vision, Performance, and Action Are Aligned: Participants learn how to connect organizational goals to team and individual responsibilities, establish meaningful performance expectations, develop actionable plans, and guide employees from their current state to desired future outcomes. This alignment helps transform change initiatives into measurable results.

Effective Leaders Reinforce Change Through Coaching, Evaluation, and Culture Building: Lasting change requires leaders to serve as both role models and sponsors while continuously evaluating progress, coaching employees, celebrating successes, and reinforcing new behaviors. Participants learn practical techniques for anchoring change into the culture so improvements continue long after the initial initiative is complete.



Full Day or Half Day

BtoC SOLUTIONS

Shifting Mindsets & Developing Team Members

Participants Will Explore:

Effective Leadership Starts with Emotional Intelligence and Self-Awareness: Managing difficult employees begins with understanding how a leader's communication, behavior, and emotional intelligence influence workplace culture. Participants learn how self-awareness, empathy, communication skills, and relationship-building techniques help address negative behaviors before they affect morale and productivity.

Open Communication and Positive Intervention Prevent Problems from Escalating: The course teaches practical techniques for motivational communication, coaching, counseling, active listening, effective questioning, and constructive feedback. Participants learn how to address concerns early, encourage accountability, and create an environment where employees are more motivated to take ownership of their behavior and performance.

Recognizing Negative Behaviors Early Leads to Better Outcomes: Participants learn how to identify warning signs, understand the causes of negativity, assess the severity of workplace issues, and effectively manage common difficult employee behaviors. The course focuses on addressing problems objectively, reducing workplace tension, and minimizing the impact negative attitudes can have on team performance and morale.

Consistent Coaching, Discipline, and Accountability Drive Lasting Improvement: When performance or behavior concerns persist, managers learn how to apply constructive feedback, positive discipline, documentation, performance improvement planning, and progressive discipline techniques fairly and consistently. The goal is to help employees improve whenever possible while protecting workplace standards and organizational effectiveness.



Full Day or Half Day

BtoC SOLUTIONS

Leading Without Doing It All

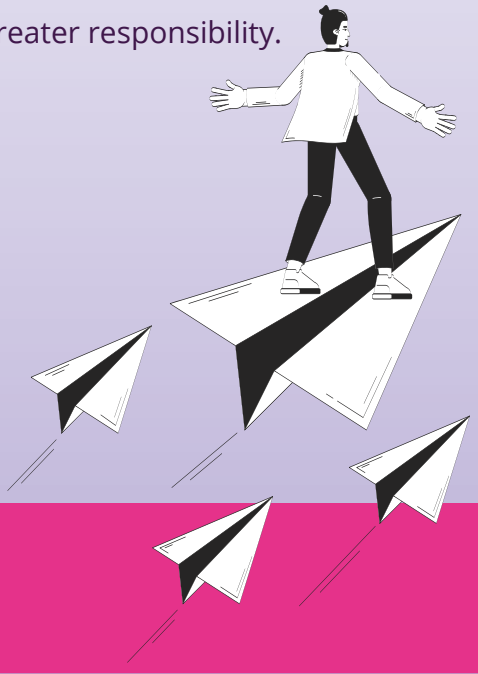
Participants Will Explore:

Effective Delegation Develops Both Results and People: Successful managers understand that leadership is about getting work accomplished through others while helping employees grow in the process. Participants learn how delegation creates accountability, develops employee capabilities, strengthens teams, and increases overall organizational effectiveness.

Strategic Delegation Improves Productivity, Time Management, and Performance: The course teaches participants how to analyze workload, identify tasks that can be delegated, assess employee capabilities, and allocate responsibilities more effectively. By leveraging the strengths of their team, managers can focus on higher-value activities while improving efficiency and reducing unnecessary workload pressures.

Clear Expectations, Communication, and Planning Increase Delegation Success: Participants learn a structured approach to delegation that includes defining goals, communicating expectations, assigning appropriate levels of authority, establishing accountability, setting priorities, providing support, and creating effective feedback systems. These skills help ensure delegated assignments are completed successfully and confidently.

Coaching, Monitoring, and Feedback Strengthen Employee Development: Delegation is more than assigning tasks—it is a powerful development tool. Participants learn how to motivate employees, provide constructive feedback, monitor progress appropriately, avoid reverse delegation, and build initiative and confidence in team members. The result is a stronger workforce that is more capable, engaged, and prepared for greater responsibility.



Full Day or Half Day

BtoC SOLUTIONS

Every Leader Casts a Shadow

Participants Will Explore:

Great Managers Create Engaged Employees Who Perform, Grow, and Stay: The quality of the relationship between employees and their manager is one of the strongest influences on engagement, productivity, retention, and workplace satisfaction. Participants learn what drives employee engagement and how effective leadership creates an environment where employees are motivated to contribute their best work.

Successful Leaders Adapt Their Style to Bring Out the Best in Others: The course helps participants identify and refine their leadership approach while learning how different personality types, motivations, communication styles, and work preferences influence team performance. Participants develop the skills needed to motivate individuals and teams more effectively.

Clear Expectations, Feedback, and Development Drive Performance: High-performing teams are built on role clarity, attainable performance standards, ongoing coaching, meaningful feedback, employee development, and accountability. Participants learn practical techniques for helping employees grow, overcome challenges, improve performance, and contribute more fully to organizational success.

Recognition, Trust, and Accountability Build Strong Workplace Cultures: Employees are more likely to stay committed when they feel valued, recognized, developed, and supported. The course teaches managers how to build trust, delegate effectively, recognize contributions, reinforce accountability, and create a culture where employees feel empowered to take ownership of results and future growth.



Full Day or Half Day

BtoC SOLUTIONS

The Supervisor's Playbook

Participants Will Explore:

Successful Supervision Begins with Clear Expectations and Accountability: Effective supervisors establish professional boundaries, communicate expectations clearly, treat employees fairly, and create an environment where accountability and performance standards are understood from the start.

Communication, Planning, and Delegation Drive Team Success: Participants learn practical strategies for setting goals, assigning work, delegating effectively, communicating clearly, and using active listening skills to improve productivity, teamwork, and results.

Positive Work Environments Increase Engagement and Performance: The course explores how supervisors can motivate employees, support career development, recognize contributions, build inclusive teams, and help employees see greater meaning in their work.

Coaching, Feedback, and Discipline Improve Employee Performance: Participants learn how to provide constructive feedback, coach employees for improvement, address performance concerns, manage difficult situations, and apply positive discipline techniques that encourage accountability and growth.



Full Day or Half Day

BtoC SOLUTIONS

Leadership That Develops People

Participants Will Explore:

Great Leaders Build Teams Around Strengths, Accountability, and Shared Goals: Successful leaders understand that strong teams are built by aligning individual strengths with team objectives, establishing clear expectations, and creating an environment where people contribute to a common purpose. Leaders learn how to position employees for success and bring out the best in every team member.

Communication and Coaching Drive Employee Growth and Team Performance: The course teaches practical leadership skills such as active listening, effective communication, timely decision-making, and the EX-DEM-PRA coaching model. Participants learn how to communicate expectations clearly, develop employee skills, provide feedback, and create a culture of continuous improvement.

Engaged Teams Thrive on Trust, Recognition, and Shared Leadership: High-performing teams are created when employees feel valued, involved, and connected to the bigger picture. Participants learn how to increase motivation, build loyalty, improve morale, recognize contributions, and create opportunities for employees to take ownership of results.

Coaching, Mentoring, and Empowerment Create Future Leaders: Great managers do more than solve problems—they develop people. Participants learn how to coach performance, mentor high-potential employees, address challenging behaviors, and progressively empower team members to take greater responsibility, build confidence, and contribute at higher levels.



Full Day or Half Day

BtoC SOLUTIONS

Accountability Conversations That Work

Participants Will Explore:

Effective Leaders Address Performance Problems Early and Objectively: Successful managers learn how to identify, assess, and define performance, behavior, and attitude issues before they become larger problems. Participants explore the root causes of poor performance and learn how early intervention helps improve results, maintain standards, and prevent problems from spreading.

Strong Supervisors Focus on Causes, Not Just Symptoms: The course helps managers distinguish between employees who don't know, can't do, aren't allowed to do, or won't do the job. Participants learn how supervision, communication, motivation, training, and workplace systems influence performance and how to address the true source of problems.

Clear Standards, Coaching, and Documentation Improve Accountability: Participants learn how to establish quality and performance standards, provide constructive feedback, coach employees for improvement, document performance issues appropriately, and develop action plans that encourage meaningful and measurable change.

Progressive Discipline Creates Fair, Consistent, and Defensible Outcomes: The course provides a practical framework for progressive discipline, including verbal reminders, written warnings, decision-making leave, and termination when necessary. Participants learn how to apply discipline fairly, maintain consistency, reduce grievances, and protect both employees and the organization throughout the process.



Full Day or Half Day

BtoC SOLUTIONS

The New Leader Experience

Participants Will Explore:

Successful New Leaders Build Credibility Through Listening, Learning, and Relationship Building: New supervisors often face pressure to prove themselves immediately, but long-term success comes from understanding the organization, building trust, learning from experienced colleagues, and developing strong relationships with direct reports, peers, and supervisors. Participants learn practical strategies for earning respect and making a positive first impression.

Effective Managers Adapt Their Leadership Style to Support Team Success: The course teaches participants how to assess employees as individuals, evaluate team dynamics, and adjust leadership approaches based on employee experience, team maturity, and workplace conditions. Participants learn how to become coaches, communicators, people developers, and problem solvers who bring out the best in their teams.

Delegation, Motivation, and Communication Drive Employee Performance: Participants learn how to hire and retain strong employees, delegate effectively, motivate individuals, provide meaningful feedback, and communicate with confidence and professionalism. The course focuses on practical tools that improve engagement, accountability, productivity, and employee development.

Strong Supervisors Address Challenges with Confidence, Accountability, and a Positive Attitude: The course provides practical strategies for managing change, resolving performance issues, administering discipline fairly, maintaining a positive workplace culture, and leading with integrity. Participants leave with the skills and mindset needed to successfully transition from individual contributor to effective supervisor or manager.



Full Day or Half Day

B to C SOLUTIONS

Building Value Through Negotiation

Participants Will Explore:

Successful Negotiations Balance Business Results and Strong Relationships: Effective negotiators understand that the best outcomes come from balancing the need to achieve favorable business terms while maintaining productive supplier relationships. Participants learn how to navigate different negotiation approaches and apply the right strategy based on the situation.

Preparation, Planning, and Alternatives Create Negotiating Power: Strong negotiators enter discussions with a clear strategy, understand their BATNA (Best Alternative to a Negotiated Agreement), evaluate sourcing options, and prepare pricing and bargaining positions in advance. The course emphasizes that negotiation is a process, not a single event.

Effective Communication Strengthens Influence and Improves Outcomes: Participants learn practical skills in probing, listening, persuasion, rapport building, assertive communication, and understanding different bargaining personalities. These techniques help uncover information, build credibility, and create more productive discussions with vendors and suppliers.

Great Negotiators Look Beyond Price to Create Greater Value: When price becomes difficult to move, skilled negotiators focus on quality, service, delivery, warranties, responsiveness, training, payment terms, and other factors that increase value. Participants learn how to identify creative solutions, break deadlocks, and structure agreements that benefit both parties.



Full Day or Half Day

BtoC SOLUTIONS

Thriving Under Pressure

Participants Will Explore:

Understanding Stress Is the First Step Toward Managing It Effectively: Participants learn what stress is, how stressors trigger physical and psychological responses, and how personal beliefs influence reactions to challenging situations. The course helps individuals recognize stress before it becomes overwhelming and identify their own sources of stress.

Self-Awareness and Mindset Influence How We Respond to Pressure: The course explores techniques for managing self-talk, overcoming perfectionism, reducing self-induced stress, and developing a more resilient outlook. Participants learn practical strategies for replacing negative thought patterns with healthier, more productive responses.

Time Management, Problem Solving, and Healthy Boundaries Reduce Everyday Stress: Participants learn how to prioritize responsibilities, overcome the "do-it-all" syndrome, delegate effectively, manage conflict, solve problems constructively, and say "no" diplomatically. These practical tools help reduce workplace and personal stress while improving productivity and balance.

Long-Term Stress Management Requires Healthy Habits and Recovery Practices: The course emphasizes the importance of exercise, nutrition, sleep, relaxation techniques, supportive relationships, recreation, and personal reflection. Participants learn the Six Rs for Stress Management and develop a personal action plan to maintain resilience, energy, and overall well-being.



Full Day or Half Day

BtoC SOLUTIONS

Creating a Culture of Ownership

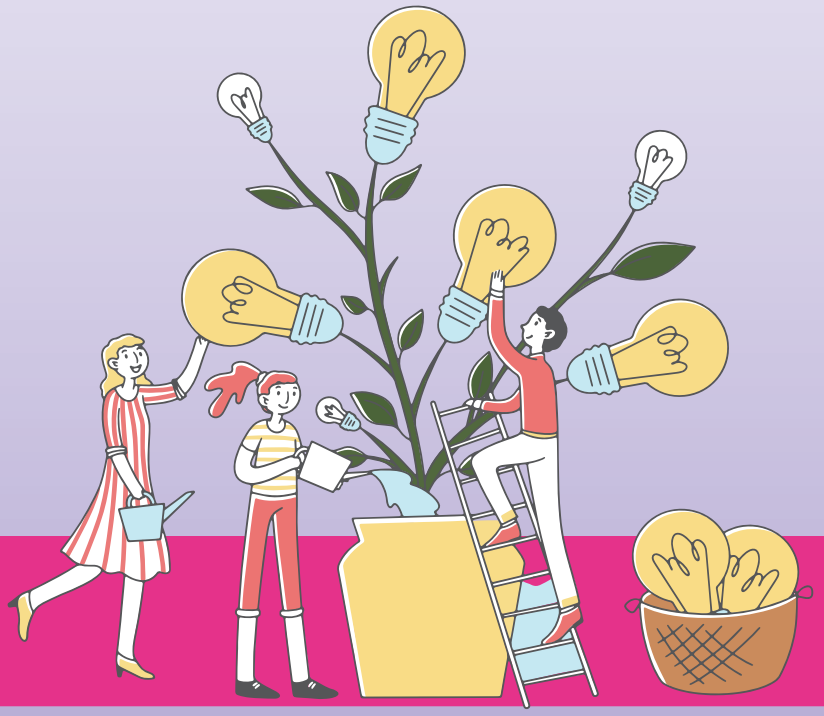
Participants Will Explore:

Accountability Starts with Clear Ownership and Defined Expectations: Employees are more likely to take ownership when responsibilities, performance standards, and expectations are clearly defined. Participants learn how to establish accountability by connecting individual responsibilities to organizational goals and creating a culture where outcomes are measurable and understood.

Strong Accountability Cultures Are Built on Consistency, Standards, and Trust: The course teaches managers how to establish clear performance expectations, create accountability systems, communicate standards consistently, and build an environment where employees understand what success looks like and why it matters.

Communication, Motivation, and Buy-In Improve Employee Commitment: Participants learn practical techniques for motivating employees, using positive language, gaining commitment, and communicating expectations effectively. When employees understand the purpose behind their work and feel connected to outcomes, accountability naturally increases.

Recognition, Coaching, and Follow-Through Sustain Long-Term Accountability: Lasting accountability requires more than setting expectations. Participants learn how to coach performance, address obstacles, recognize strong contributors, provide meaningful feedback, and reinforce accountable behaviors that improve engagement, productivity, and results.



Full Day or Half Day

BtoC SOLUTIONS

The Proactive Leader

Participants Will Explore:

Effective Leaders Anticipate Change Instead of Reacting to It: Organizations operate in constantly changing environments where success depends on adapting to future challenges before they become problems. Participants learn how to recognize emerging issues, understand the impact of change, and develop a proactive mindset that focuses on preparation, adaptability, and long-term success.

Clear Goals, Structured Thinking, and Measurable Outcomes Drive Better Results: The course teaches participants how to define desired outcomes, use SMART goals, evaluate available resources, and create sustainable solutions. These practical tools help individuals and teams make better decisions while maintaining focus on meaningful and measurable results.

Forward Thinking Replaces Problem-Focused Feedback with Solution-Focused Action: Participants explore the difference between traditional feedback and feed-forward approaches that anticipate challenges before they occur. By focusing on future opportunities rather than past mistakes, leaders can improve communication, encourage accountability, and create more productive coaching conversations.

Coaching and Collaboration Help Build Better Solutions Faster: The course introduces practical tools such as the NARRATE Model and pre-coaching techniques that help individuals gather ideas, evaluate alternatives, and develop action plans before challenges become major obstacles. Participants learn how to strengthen problem-solving skills, increase self-responsibility, and improve coaching effectiveness throughout the organization.



Full Day or Half Day

BtoC SOLUTIONS

Building a High Performance Mindset

Participants Will Explore:

Optimism Creates the Foundation for Greater Performance and Personal Success: Participants learn how optimism influences achievement, resilience, and the ability to navigate change. The course explores the connection between positive thinking and peak performance while demonstrating how practical optimism helps individuals recognize opportunities, overcome setbacks, and achieve meaningful goals.

Changing Thought Patterns Creates New Possibilities for Success: The course introduces practical tools such as the RENEW model, helping participants identify negative thinking patterns, challenge limiting beliefs, overcome self-sabotage, and replace unproductive reactions with more constructive and empowering responses.

Optimistic People Build Confidence Through Vision, Action, and Continuous Growth: Participants learn how belief, goal setting, visualization, risk-taking, personal accountability, and ongoing development contribute to higher levels of motivation and achievement. The course emphasizes turning aspirations into action through consistent effort and practical habits.

Positive Relationships and Supportive Communities Sustain Long-Term Success: Peak performance is strengthened through appreciation, teamwork, open communication, support networks, and meaningful relationships. Participants learn how to create positive workplace environments, build stronger connections with others, and develop support systems that encourage growth and resilience.



Full Day or Half Day

BtoC SOLUTIONS

Time Management & Prioritization

Participants Will Explore:

Effective Time Management Starts with Understanding How You Work Best: Participants assess their personal work habits, identify common productivity challenges, and recognize how their natural task management style influences priorities, decision-making, and daily effectiveness. Understanding these patterns creates the foundation for lasting improvement.

Prioritization and Planning Help Turn Busy Days into Productive Days: The course teaches practical techniques for setting priorities, creating daily plans, managing controllable time, and focusing on high-value activities. Participants learn how to organize workloads, align tasks with goals, and spend more time on the activities that produce the greatest results.

Managing Interruptions, Meetings, and Delegation Protects Valuable Time: Participants learn strategies for reducing interruptions, conducting more efficient meetings, delegating appropriately, and working more effectively with others. These skills help minimize common time wasters while increasing focus, productivity, and collaboration.

Strong Habits and Goal Setting Create Long-Term Performance Improvements: The course explores goal setting, prioritization, habit formation, overcoming procrastination, and maintaining productive routines. Participants leave with practical tools for building sustainable habits that improve performance, reduce stress, and help them achieve important personal and professional goals.



Full Day or Half Day

BtoC SOLUTIONS



Lean, Continuous Improvement & Behavioral Insight

Behavior Change

Participants Will Explore:

Lasting Change Requires More Than Motivation Alone: Successful behavior change occurs when organizations address both motivation and ability. Participants learn why good intentions alone are rarely enough and why sustainable change requires a combination of personal, social, and structural influences working together.

The Influencer Model Provides a Framework for Driving Meaningful Change: The course introduces the Influencer Model, which focuses on making desirable behaviors easier to adopt by increasing motivation, building capability, leveraging social support, creating accountability, and removing barriers to success. Participants learn how multiple influence strategies work together to produce lasting results.

Culture, Accountability, and Environment Shape Workplace Behaviors: Participants learn how leadership modeling, peer accountability, performance alignment, rewards, and workplace systems influence employee behavior. The course emphasizes creating environments where desired behaviors become easier, more visible, and more sustainable over time.

AI Can Help Support, Reinforce, and Sustain Behavior Change Efforts: The course explores practical ways AI can be used to support behavior change initiatives, including improving process adoption, identifying barriers to employee buy-in, strengthening SOPs through observable behaviors, creating audit plans, and helping leaders navigate change conversations more effectively.



4 Hours

Daily Management System

Participants Will Explore:

Daily Management Creates Visibility Into Performance and Priorities: A successful Daily Management System helps teams understand whether they are winning or losing by making performance visible through scoreboards, key metrics, and daily reviews. Participants learn how visual management improves awareness, focus, and accountability across the organization.

Scoreboards Turn Data Into Actionable Team Conversations: The course teaches how to build balanced department scoreboards that track quality, customer satisfaction, safety, process flow, engagement, productivity, delivery, financial performance, and overall impact. Participants learn how visual metrics help teams identify challenges, monitor trends, and improve results.

Daily Huddles Improve Communication, Alignment, and Problem Solving: Participants learn how to conduct short, focused daily huddles that keep teams informed, review performance, identify barriers, celebrate successes, and establish priorities for the day. These meetings help surface issues early and prevent small problems from becoming larger challenges.

Tiered Huddles Accelerate Escalation and Continuous Improvement: The course explores how tiered huddles connect frontline employees, managers, and executives through a structured process that quickly escalates issues and supports continuous improvement efforts. Participants learn practical methods for improving communication flow, accountability, engagement, and responsiveness throughout the organization.



4 Hours

BPI BtoC SOLUTIONS

DiSC Agile EQ

Participants Will Explore:

Emotional Intelligence Is the Agility to Respond Effectively in Different Situations: Participants learn that emotional intelligence is not a fixed trait but the ability to recognize the emotional and interpersonal needs of a situation and respond accordingly. The course introduces practical strategies for becoming more adaptable, effective, and responsive in a variety of workplace interactions.

Understanding Your Natural EQ Strengths Builds Greater Self-Awareness: Using the DiSC framework, participants identify the mindsets that come most naturally to them and explore how those strengths influence communication, decision-making, relationships, and workplace effectiveness. The course helps individuals recognize and leverage their natural emotional intelligence strengths.

Expanding Beyond Your Comfort Zone Increases Flexibility and Influence: Participants learn about the eight Agile EQ mindsets and discover when different situations call for different responses. By understanding the benefits of stretching beyond preferred behaviors, they gain practical tools for adapting their approach, improving collaboration, and handling challenges more effectively.

Developing New Mindsets Creates Lasting Personal and Professional Growth: The course provides a structured approach for building emotional agility through practice, reflection, and action planning. Participants learn how to develop new habits, strengthen emotional intelligence over time, and improve relationships, decision-making, communication, and overall performance.



3 x 2 Hour Sessions

Authorized Partner EVERYTHING DiSC A Wiley Brand

BtoC SOLUTIONS

DiSC in Management

Participants Will Explore:

Great Managers Understand Themselves Before Leading Others: Effective leadership begins with self-awareness. Participants learn how their natural DiSC style influences communication, decision-making, delegation, motivation, and management effectiveness. understanding their own strengths and challenges, managers can lead with greater confidence and adaptability.

Understanding Different Work Styles Improves Relationships and Results: The course helps participants recognize and understand the unique DiSC styles of others. Managers learn practical techniques for adapting their approach to different personalities, improving communication, strengthening relationships, and building more productive teams.

Effective Managers Adapt How They Direct, Delegate, and Motivate: Participants explore how different employees prefer to receive direction, feedback, support, and motivation. The course provides practical strategies for delegating effectively, creating motivating work environments, and helping employees perform at their highest levels.

Developing People and Managing Up Strengthens Leadership Impact: Successful managers invest in employee growth while building strong relationships with organizational leaders. Participants learn how to develop talent based on individual strengths, influence effectively, gain buy-in, and build productive partnerships throughout the organization.



3 x 2 Hour Sessions

Authorized Partner EVERYTHING DiSC A Wiley Brand

BtoC SOLUTIONS

How to Handle Emotionally Charged Situations

Participants Will Explore:

Emotional Intelligence Begins with Taking Responsibility for Your Responses: Participants learn how attitudes, perceptions, self-talk, and emotional triggers influence behavior during difficult situations. The course focuses on developing self-awareness, emotional control, and constructive responses that improve outcomes during conflict and confrontation.

Managing Emotions and Stress Creates Better Decisions Under Pressure: The course provides practical techniques for recognizing the warning signs of stress and anger, reframing perceptions, managing emotional reactions, and developing healthier patterns of behavior. Participants learn strategies that help them remain calm, focused, and professional when emotions run high.

Constructive Communication Reduces Conflict and Builds Understanding: Participants learn how to listen actively, communicate assertively, avoid blaming, focus on facts rather than emotions, and respond effectively to negativity in others. These skills help create more productive conversations and reduce the likelihood of conflicts escalating into confrontations.

Conflict Resolution Skills Strengthen Relationships and Workplace Effectiveness: The course teaches practical frameworks for managing criticism, resolving disagreements, finding common ground, creating win-win outcomes, and maintaining positive relationships. Participants learn how to handle difficult conversations with confidence while preserving trust, respect, and long-term collaboration.



Full Day or Half Day

BtoC SOLUTIONS

Lean Overview

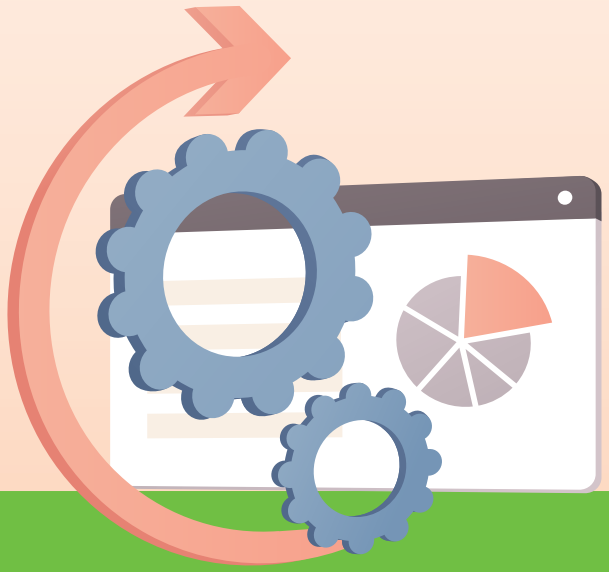
Participants Will Explore:

Lean Focuses on Creating More Value with Less Waste: Lean is based on the principles of the Toyota Production System and helps organizations improve performance by identifying customer value, eliminating waste, improving processes, and continuously enhancing the way work gets done. The goal is to create better outcomes for customers, employees, and the organization.

Continuous Improvement and Respect for People Are the Foundation of Lean: Successful Lean organizations combine a commitment to ongoing improvement with a deep respect for employees. Participants learn how engaging frontline employees, understanding processes firsthand, asking better questions, and developing people contribute to sustainable improvement and better business results.

Lean Provides Practical Tools to Solve Problems and Improve Processes: The course introduces key Lean concepts including the 5 Lean Principles, DOWNTIME waste reduction, value stream mapping, flow, pull systems, standard work, PDCA, A3 problem solving, and Kaizen. Participants gain practical tools they can apply immediately to improve quality, efficiency, customer satisfaction, and workplace effectiveness.

Small, Consistent Improvements Drive Long-Term Organizational Success: Lean is built on the belief that every process can be improved. Participants learn how to identify opportunities for improvement, collect meaningful data, involve others in problem solving, implement changes, and establish standards that sustain gains over time.



4 Hours

BPI BtoC SOLUTIONS

A3 & PDCA

Participants Will Explore:

Structured Problem Solving Delivers Better Results Than Jumping to Conclusions: Participants learn how the Plan-Do-Check-Act (PDCA) cycle applies the scientific method to workplace challenges. Rather than rushing to solutions, PDCA provides a disciplined, iterative process for understanding problems, testing ideas, evaluating results, and implementing sustainable improvements.

Effective Improvement Starts with Defining Problems Clearly and Finding Root Causes: The course teaches participants how to write objective problem statements, establish SMART goals, collect meaningful data, identify performance gaps, and use tools such as Fishbone Diagrams and the 5 Whys to uncover root causes rather than treating symptoms.

A3 Creates a Clear, Visual Story of Improvement Efforts: Participants learn how to use the A3 framework to communicate problems, analysis, countermeasures, implementation plans, and results on a single page. The A3 process helps teams organize thinking, align stakeholders, encourage collaboration, and document learning in a concise and effective format.

Coaching and Continuous Improvement Build Better Problem Solvers: The course emphasizes a leadership approach that develops people through questioning, coaching, and critical thinking rather than simply providing answers. Participants learn how PDCA and A3 work together to create a culture of continuous improvement, stronger problem-solving capabilities, and more effective leadership.



4 Hours

BtoC SOLUTIONS

Kaizen Events 101

Participants Will Explore:

Small Improvements Made Every Day Create Extraordinary Results Over Time: Kaizen is built on the belief that employees closest to the work often have the best ideas for improving it. Participants learn how engaging employees in continuous improvement creates greater ownership, stronger problem-solving capabilities, higher engagement, and more sustainable results.

Successful Kaizen Events Focus on Action, Learning, and Rapid Improvement: The course explores how Kaizen events bring together employees, leaders, and support teams to identify opportunities, test ideas, implement solutions, and achieve measurable improvements within compressed timeframes. Participants learn the difference between daily improvements, Point Kaizen, Kaizen Mapping, and larger Kaizen Burst events.

Structured Planning and Collaboration Increase the Likelihood of Success: Participants learn how to prepare for Kaizen events through effective planning, team selection, data gathering, event logistics, goal setting, and stakeholder engagement. The course emphasizes the importance of involving the right people, working close to the process, and creating an environment where all ideas are valued.

Measurement, Follow-Up, and Sustainment Turn Improvements into Lasting Results: The course teaches practical methods for measuring success, tracking improvements, sustaining gains, and sharing learning across the organization. Participants learn how time-based and count-based metrics help demonstrate impact while follow-up activities ensure improvements remain in place long after the event ends.



4 Hours

BtoC SOLUTIONS

Capacity Analysis 101

Participants Will Explore:

Capacity Analysis Helps Organizations Match Resources to Demand: Participants learn how capacity is defined, measured, and managed to ensure organizations have the right people, equipment, space, tools, and supplies needed to meet customer demand. The course explores the difference between potential capacity and actual capacity while helping participants understand the factors that influence performance.

Identifying Constraints Is the First Step to Improving Throughput: The course examines the common causes of capacity constraints, including staffing shortages, equipment performance, process variation, supplier limitations, regulations, waste, and space restrictions. Participants learn how bottlenecks limit overall performance and how to identify the factors that have the greatest impact on results.

OEE Provides a Powerful Framework for Measuring Equipment Performance: Participants learn how Overall Equipment Effectiveness (OEE) measures capacity through three critical factors: Availability, Performance, and Quality. The course introduces practical methods for calculating OEE, tracking equipment losses, evaluating performance, and identifying opportunities for improvement.

Theory of Constraints and TPM Help Remove Bottlenecks and Improve Flow: The course introduces Theory of Constraints (TOC) and Total Productive Maintenance (TPM) as practical approaches for increasing throughput, reducing downtime, eliminating waste, improving reliability, and supporting continuous improvement. Participants learn how to focus improvement efforts where they will create the greatest impact on organizational performance.



4 Hours

BtoC SOLUTIONS

Setup Reduction 101

Participants Will Explore:

Reducing Setup Time Increases Capacity Without Adding Resources: Participants learn the principles of Single Minute Exchange of Dies (SMED), also known as rapid changeover. The course explores setup time as the period between completing one task and producing the next good output, helping organizations reduce downtime and increase productive capacity.

Faster Setups Improve Customer Service, Productivity, and Financial Results: The course demonstrates how reducing setup times decreases customer wait times, speeds up service delivery, reduces labor requirements, minimizes inventory and backlogs, and improves overall business performance. Participants learn why setup reduction is a powerful leverage point for operational improvement.

Separating Internal and External Activities Is the Foundation of SMED: Participants learn how to analyze setup processes by identifying internal activities that require the process to stop and external activities that can be completed while the process is running. The course teaches practical methods for converting internal activities to external activities to shorten downtime significantly.

Observation, Standardization, and Continuous Improvement Drive Sustainable Results: The course provides a structured approach that includes observing the process, mapping workflows, capturing setup times, engaging workers, eliminating waste, applying 5S principles, and standardizing best practices. Participants learn practical techniques for reducing setup time while improving consistency, quality, and efficiency.



4 Hours

BtoC SOLUTIONS

Error Proofing & Standard Work 101

Participants Will Explore:

High-Performing Processes Are Designed to Prevent Errors Before They Occur: Participants learn the principles of error proofing (Poka-Yoke), a practical approach for preventing mistakes or detecting them immediately when they occur. The course emphasizes simple, low-cost solutions that improve quality, reduce defects, and create more reliable processes.

Understanding Human Error Is Essential for Building Better Systems: The course explores common causes of mistakes, including forgetfulness, misunderstanding, lack of experience, distractions, unclear standards, and rushing. Participants learn that human error will always exist and that effective processes are designed to anticipate and reduce its impact.

Standard Work Creates Consistency, Reliability, and Continuous Improvement: Participants learn how Standard Operating Procedures (SOPs), work standards, checklists, training systems, cross-training matrices, and leader standard work create consistency across teams. Standard work provides clear expectations, reduces variation, improves training, and establishes a foundation for ongoing improvement.

Preventing Errors Early Reduces Cost and Improves Customer Satisfaction: The course demonstrates how the cost of mistakes increases dramatically the later they are discovered. Participants learn practical methods for identifying root causes, implementing preventive controls, simplifying processes, and creating systems that catch problems before they reach customers.



4 Hours

BtoC SOLUTIONS

Continuous Flow 101

Participants Will Explore:

Continuous Flow Improves Speed, Quality, and Customer Responsiveness: Continuous Flow focuses on moving work smoothly through a process with minimal waiting, batching, rework, or delays. Participants learn how one-piece flow, standardized work, and process design help reduce waste, improve cycle times, and create more value for customers.

Standardized Work Creates the Foundation for Sustainable Flow: The course introduces the key elements of standardized work, including takt time, level loading, standard work-in-process (WIP), and work sequence. Participants learn how these tools help align work with customer demand, create consistency, identify bottlenecks, and improve overall process performance.

Level Loading and Cellular Layout Reduce Delays and Improve Efficiency: Participants learn practical techniques for balancing workloads, minimizing waiting, reducing transportation waste, and designing work around products and services rather than departments. The course explores concepts such as Heijunka, cellular layouts, and single-stall production to improve flow and shorten lead times.

Theory of Constraints Helps Identify and Eliminate Bottlenecks: The course teaches participants how to identify system constraints, reduce bottlenecks, improve throughput, and focus improvement efforts where they will have the greatest impact. Participants learn the practical application of the Theory of Constraints to increase flow, reduce inventory, and drive continuous improvement.



4 Hours

BtoC SOLUTIONS

Pull & Kanban 101

Participants Will Explore:

Pull Systems Produce Work Based on Actual Demand, Not Forecasts: Participants learn the difference between push and pull systems and how pull-based processes improve flow by responding to real customer demand rather than predictions. The course demonstrates how producing only what is needed helps reduce inventory, eliminate waste, and improve responsiveness.

Kanban Provides a Simple Visual System for Managing Work and Inventory: The course introduces Kanban as a practical method for implementing pull systems using visual signals such as cards, boards, containers, flags, stickers, or other triggers. Participants learn how Kanban authorizes work based on actual demand and creates greater visibility throughout the process.

Effective Kanban Systems Improve Flow While Reducing Waste: Participants learn how Kanban helps reduce inventory, prevent overproduction, improve process flow, increase responsiveness to changing demand, and create visual scheduling systems that place greater control at the operational level. These benefits help organizations become more agile, efficient, and customer-focused.

Simple Replenishment Systems Create Reliable and Sustainable Operations: The course explores practical applications of Kanban including office supply management, supermarkets, manufacturing environments, two-bin replenishment systems, personal task management, and supply chain operations. Participants learn how simple signals and replenishment methods ensure resources are available when needed without excessive inventory.



4 Hours

BtoC SOLUTIONS

DiSC Fundamentals

Participants Will Explore:

Self-Awareness Is the Foundation of Strong Workplace Relationships: DiSC Fundamentals introduces participants to the DiSC model and helps them better understand their own workplace preferences, behaviors, and communication styles. Through personalized insights and practical reflection, participants gain greater self-awareness and develop a stronger understanding of how they impact others.

Understanding the Four DiSC Styles Creates a Common Language for Collaboration: Participants learn the characteristics of the Dominance (D), Influence (i), Steadiness (S), and Conscientiousness (C) styles and discover how differences in approach, communication, and decision-making influence workplace relationships. The course reinforces that all styles are valuable and that everyone represents a blend of multiple styles.

Personalized Insights Help Participants Leverage Strengths and Stretch Beyond Comfort Zones: Using the Everything DiSC® on Catalyst™ platform, participants explore their style story, identify their natural strengths, understand their workplace tendencies, and recognize areas that may require additional effort or flexibility. The course encourages growth through greater awareness and intentional adaptation.

Better Understanding of Colleagues Strengthens Communication and Team Effectiveness: Participants learn how to use DiSC to better understand coworkers, identify similarities and differences, improve collaboration, and build stronger working relationships. Through practical discussions and interactive activities, they develop strategies for communicating more effectively and working successfully with a variety of personality styles.



2 Hours

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BtoC SOLUTIONS

Understanding Value & Waste

Participants Will Explore:

Lean Improvement Begins with Understanding What Creates Value: Participants learn how to evaluate work from the customer's perspective and determine whether an activity truly adds value. The course introduces the three characteristics of value: the customer is willing to pay for it, it transforms the product or service, and it is done right the first time.

Most Processes Contain More Non-Value-Added Work Than Organizations Realize: The course explores the difference between Value-Added (VA), Non-Value-Added (NVA), and Non-Value-Added but Required (NVAR) activities. Participants learn how to identify pure waste, challenge unnecessary work, and focus improvement efforts where they will have the greatest impact.

The Eight Wastes Provide a Practical Framework for Identifying Improvement Opportunities: Participants learn the DOWNTIME model of waste: Defects, Overproduction, Waiting, Non-Utilized Talent, Transportation, Inventory, Motion, and Extra Processing. Through real-world examples, they develop the ability to recognize waste in everyday work processes and understand how waste affects quality, productivity, cost, and customer satisfaction.

Reducing Waste Improves Efficiency, Sustainability, and Organizational Performance: The course demonstrates how eliminating waste reduces unnecessary costs, minimizes environmental impact, improves resource utilization, and creates more value for customers. Participants learn practical techniques for observing processes, identifying opportunities, and applying continuous improvement thinking in their own work environments.



4 Hours

BPI BtoC SOLUTIONS

5S & Visual Controls

Participants Will Explore:

5S Creates an Organized Workplace Where Everything Has a Place: Participants learn how 5S provides a structured approach to workplace organization by ensuring everything has a place, is in its place, and is ready for use. More than housekeeping, 5S reduces stress, improves productivity, and establishes a strong foundation for Lean improvement efforts.

The Five Elements of 5S Improve Efficiency and Reduce Waste: The course introduces the five pillars of 5S: Sort, Set in Order, Shine, Standardize, and Sustain. Participants learn practical methods for removing unnecessary items, organizing workspaces, maintaining cleanliness, establishing standards, and creating habits that support long-term operational excellence.

Visual Controls Communicate Information Quickly and Make Problems Visible: Participants learn how visual management tools such as color coding, signage, floor markings, shadow boards, Kanban boards, standard work instructions, communication boards, and Andon systems reduce confusion, improve communication, and help teams identify abnormalities before they become larger problems.

Sustaining Improvement Requires Standards, Accountability, and Employee Involvement: The course emphasizes the importance of maintaining gains through clear responsibilities, audits, visual standards, continuous improvement, and active employee participation. Participants learn practical strategies for building a culture where workplace organization and visual management become part of everyday work.



4 Hours

Gemba Walks

Participants Will Explore:

Better Decisions Are Made Where the Work Actually Happens: Participants learn the concept of Gemba, a Japanese term meaning "the real place," where value is created and work is performed. The course emphasizes observing processes firsthand, involving employees in problem-solving, and making decisions based on direct observation rather than assumptions or secondhand information.

Gemba Walks Improve Problem Solving Through Observation and Inquiry: The course teaches a structured approach in which leaders observe workflows, ask open-ended questions, listen carefully to employees, reflect on insights, and identify opportunities for improvement. Participants learn how these interactions uncover root causes and lead to more effective solutions.

Respect for People Is Essential to Continuous Improvement: Successful Gemba Walks are built on the principles of "Go See, Ask Why, Show Respect." Participants learn how engaging employees in discussions about their work demonstrates respect, builds trust, increases involvement, and encourages employees to contribute ideas for improving performance.

Regular Gemba Walks Strengthen Communication, Engagement, and Continuous Improvement: The course highlights how consistent workplace observation helps leaders communicate vision, empower employees, identify improvement opportunities, and better understand operational challenges. Participants learn how disciplined Gemba Walks support a culture of continuous improvement while maintaining focus on sustainable change.



4 Hours

BPI BtoC SOLUTIONS

Voice of the Customer & Data Collection

Participants Will Explore:

Understanding Customer Needs Is the Starting Point for Meaningful Improvement: Participants learn how to capture the Voice of the Customer (VOC) through surveys, conversations, reviews, social media, customer retention trends, response times, and direct feedback. The course emphasizes that organizations should not guess what customers want—they should ask and listen.

Customer Feedback Must Be Measured to Drive Better Decisions: The course explores practical ways to evaluate customer satisfaction using metrics such as survey scores, repeat business, loyalty data, response times, occupancy rates, sales trends, and Net Promoter Score (NPS). Participants learn how meaningful measurements help organizations understand performance and identify opportunities for improvement.

Effective Data Collection Provides Insight, Reduces Assumptions, and Supports Improvement: Participants learn why data matters and how different types of data—including quantitative, count, qualitative, and locational data—help organizations understand problems, identify patterns, and make informed decisions. The course introduces practical tools such as check sheets, data collection forms, surveys, interviews, focus groups, and defect concentration charts.

Collecting the Right Data Is Just as Important as Collecting Enough Data: The course teaches participants how to structure data effectively, select appropriate sampling methods, and avoid common mistakes that can lead to misleading conclusions. Participants learn practical guidelines for gathering reliable information that supports sound decision-making and continuous improvement efforts.



4 Hours

BPI BtoC SOLUTIONS

Process Mapping & Value Stream Mapping

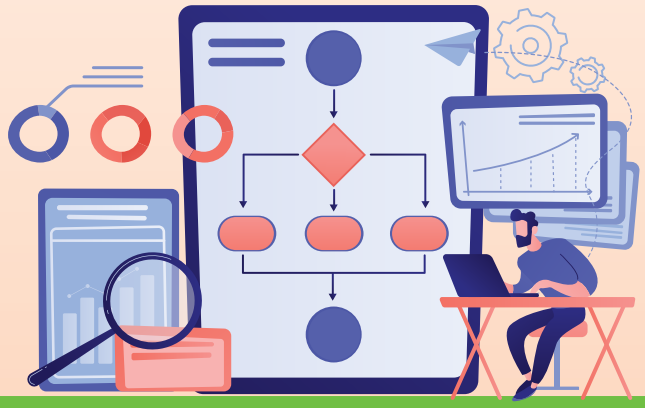
Participants Will Explore:

Visualizing Work Creates Clarity and Reveals Improvement Opportunities: Participants learn how process maps provide a visual representation of work that is easier to understand than written procedures. The course demonstrates how mapping validates the actual process, engages employees, supports training, and helps identify gaps, redundancies, delays, and waste that may otherwise go unnoticed.

Process Mapping Helps Teams Understand How Work Flows Across People and Functions: The course introduces process flow diagrams, swimlane maps, and varying levels of process detail, from high-level overviews to detailed workflows. Participants learn how to document processes, define boundaries, use common mapping symbols, clarify responsibilities, and improve communication between departments and functional areas.

Value Stream Mapping Exposes Delays, Constraints, and Non-Value-Added Activities: Participants learn how Value Stream Mapping (VSM) captures both material and information flow from customer request through delivery. The course teaches how to analyze cycle time, lead time, value-added work, inventory, handoffs, and bottlenecks to identify opportunities for improving flow, reducing waste, and increasing responsiveness to customer needs.

Future-State Thinking Drives Continuous Improvement and Better Business Results: The course guides participants through the process of creating current-state and future-state maps, developing action plans, prioritizing improvement opportunities, and implementing sustainable changes. Participants learn practical methods for increasing process efficiency, improving customer response times, reducing delays, and strengthening overall organizational performance.



4 Hours

BPI BtoC SOLUTIONS

Lean Fundamentals Learning Experience

Participants Will Explore:

Lean Creates More Value by Eliminating Waste and Improving Flow: Participants gain a comprehensive understanding of Lean principles and learn how organizations improve quality, efficiency, customer satisfaction, and performance by focusing on value creation, waste reduction, continuous improvement, and respect for people. The course introduces the foundational concepts that drive successful Lean cultures and sustainable operational excellence.

Understanding Processes and Customer Needs Drives Meaningful Improvement: The course teaches participants how to evaluate work from the customer's perspective, identify value-added and non-value-added activities, collect meaningful data, conduct Gemba Walks, and use process mapping and Value Stream Mapping to understand workflows, identify bottlenecks, and uncover opportunities for improvement.

Practical Lean Tools Help Solve Problems and Improve Performance: Participants learn a broad range of Lean tools including 5S, Visual Controls, PDCA, A3 Problem Solving, Kaizen Events, Capacity Analysis, Setup Reduction (SMED), Error Proofing, Standard Work, Continuous Flow, Pull Systems, and Kanban. These tools provide practical methods for improving productivity, quality, safety, responsiveness, and overall operational effectiveness.

Sustaining Improvement Requires Daily Management, Accountability, and Behavior Change: Successful Lean organizations create cultures where improvement becomes part of everyday work. Participants learn how Daily Management Systems, visual performance tracking, accountability, coaching, employee involvement, and behavior change strategies help sustain gains, improve engagement, and build long-term continuous improvement capabilities throughout the organization.



8 Days

BPI BtoC SOLUTIONS

DiSC Workplace

Participants Will Explore:

Self-Awareness Creates the Foundation for Workplace Success: Participants gain a deeper understanding of their DiSC style, workplace priorities, motivators, and stressors. Through personalized insights, they learn how their natural tendencies influence communication, decision-making, collaboration, and overall effectiveness at work.

Understanding Different Styles Improves Communication and Teamwork: The course explores the unique characteristics, priorities, and workplace preferences of the four DiSC styles. Participants learn how different personalities approach work, relationships, and challenges, helping them communicate more effectively and collaborate with greater confidence.

Strong Relationships Are Built Through Adaptability and Understanding: Participants discover practical strategies for recognizing the needs, motivations, and perspectives of others. By adapting their approach to different work styles, they can build trust, reduce misunderstandings, strengthen teamwork, and improve workplace interactions.

Practical Action Plans Turn Insight Into Lasting Results: The course moves beyond awareness by helping participants develop personal action plans focused on improving communication, effectiveness, and workplace relationships. Participants leave with tools and strategies they can apply immediately to create a more productive and positive work environment.



3 x 2 Hours Sessions

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BtoC SOLUTIONS



Hospitality Revenue Management

Introduction to Revenue Management

Participants Will Explore:

Revenue Management Is about Creating Value, Not Just Increasing Revenue: Organizations succeed when customers see value in what they buy. Effective revenue management focuses on creating that value through thoughtful pricing, strong customer understanding, and better business decisions.

Customer Perception Should Drive Pricing Decisions: Revenue managers recognize that customers place different levels of value on the same product or service. Understanding will ingness to pay helps organizations align pricing with customer needs rather than relying solely on costs or traditional pricing formulas.

Data and Insight Improve Revenue Performance: Strong revenue decisions require more than reports and metrics. Leaders must combine data, forecasting, experience, and market awareness to make decisions that improve both customer outcomes and business results.

Long-Term Success Comes from Balancing Customer Value and Business Goals: Organizations that focus only on short-term profits often miss opportunities for sustainable growth. Effective revenue management optimizes revenue by creating positive outcomes for customers while improving profitability, loyalty, and long-term performance.



4 hours

BtoC SOLUTIONS

Strategic Pricing

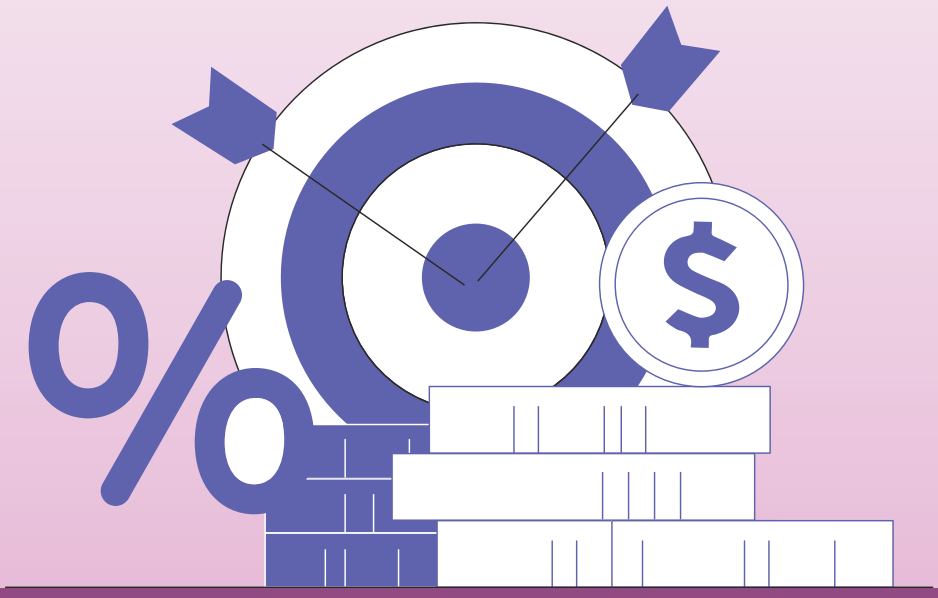
Participants Will Explore:

Price Should Reflect Customer Value, Not Just Costs: Effective pricing starts with understanding what customers value and what they are willing to pay. While costs matter, pricing decisions should be driven by customer perceptions of value rather than a formula built solely around expenses.

Strategic Pricing Requires Understanding Both the Buyer and the Seller: Successful revenue managers recognize that every transaction must work for both parties. Customers evaluate whether the benefits they receive justify the price, while businesses must ensure prices support long-term profitability and growth.

Price Is One of the Most Powerful Business Tools: Among the elements of the marketing mix, price is often the most visible and influential factor affecting customer decisions. Thoughtful pricing helps communicate value, attract the right customers, and position products and services effectively in the marketplace.

Revenue Growth Comes from Strategy, Not Simple Pricing Formulas: Strong pricing decisions consider customer behavior, market conditions, value perception, and business objectives. Leaders who rely only on supply and demand models or cost-based formulas often miss opportunities to optimize revenue, profitability, and customer loyalty.



4 hours

BtoC SOLUTIONS

Value

Participants Will Explore:

Value Is Determined by the Customer, Not the Seller: Customers decide whether a purchase is worthwhile based on the benefits they believe they will receive compared to the price they pay. Organizations create success when they understand those perceptions and align their products, services, and pricing accordingly.

Quality, Service, and Price Work Together to Create Value: Customers evaluate value through a combination of product quality, service experience, and price. Improving quality or service can increase value, but only when the customer believes the added benefit justifies the price they are asked to pay.

Different Customers Perceive Value Differently: What represents excellent value to one customer may not appeal to another. Buying decisions are influenced by individual needs, expectations, willingness to pay, and the alternatives available, making customer understanding essential to revenue success.

Successful Pricing Requires Both Data and Judgment: Strong revenue decisions are built on more than formulas and reports. Effective leaders combine data, experience, and insight to understand customer behavior and price products and services in ways that maximize both customer value and business performance.



4 hours

BtoC SOLUTIONS

Differential Pricing

Participants Will Explore:

Different Customers Place Different Values on the Same Product: Effective revenue managers recognize that not every customer is willing to pay the same price for the same product or service. Differential pricing aligns prices with customer value perceptions, allowing organizations to serve more customers while improving revenue and profitability.

Strategic Pricing Captures Value without Sacrificing Demand: A single price often leaves revenue on the table from customers willing to pay more while excluding customers willing to pay slightly less. Differential pricing helps organizations balance both opportunities by matching prices to customer willingness to buy.

Price Differences Should Be Based on Clear Customer Behaviors and Needs: Revenue leaders use factors such as customer characteristics, purchase timing, quantity purchased, distribution channel, product version, bundled offers, and payment terms to create pricing options that make sense to buyers and support business goals.

The Goal Is Revenue Optimization, Not Simply More Sales: Successful pricing strategies focus on improving profitability, not just increasing volume. By combining data, customer insight, and thoughtful pricing decisions, organizations can generate stronger financial results while delivering value to the customers they serve.



4 hours

BtoC SOLUTIONS

The Revenue Manager

Participants Will Explore:

Revenue Managers Balance Demand, Pricing, and Profitability: Effective revenue managers do far more than adjust prices. They use data, forecasting, and business insight to make decisions that optimize revenue while supporting long-term profitability and customer value.

Successful Revenue Management Requires Both Analysis and Action: Revenue managers continuously establish prices, forecast demand, manage inventory, oversee distribution channels, and evaluate results. These activities help organizations make informed decisions that improve financial performance and competitive positioning.

Revenue Managers Must Balance Business Goals with Fairness and Ethics: Strong revenue decisions are not based solely on maximizing revenue. Revenue managers must consider legal requirements, ethical pricing practices, customer perceptions of value, and long-term relationships when making pricing and inventory decisions.

Revenue Management Is a Team Effort: Revenue managers work closely with leaders in sales, marketing, operations, finance, and customer service. By aligning pricing strategies with organizational goals and customer needs, they help create stronger business results across the entire operation.



4 hours

BtoC SOLUTIONS

Forecasting Demand

Participants Will Explore:

Accurate Forecasts Drive Better Business Decisions: Revenue managers use historical data, current business trends, and future market factors to predict demand. Strong forecasts help organizations make smarter decisions about staffing, inventory, pricing, and resource allocation before demand actually occurs.

Effective Forecasting Helps Balance Customer Service and Performance: When demand is accurately predicted, teams can prepare the right people, products, and services at the right time. This improves the customer experience while helping the business operate more efficiently and profitably.

Demand Forecasting Requires More Than Looking at Past Results: Successful revenue managers monitor reservations, booking pace, market conditions, local events, competitor activity, and emerging trends. Combining data with business insight creates forecasts that are more accurate and actionable.

Strong Forecasts Lead to Better Pricing Decisions: Forecasting helps leaders identify periods of high and low demand so they can manage pricing strategically. Rather than reacting to market conditions, effective organizations use forecasts to make proactive decisions that optimize revenue, improve performance, and support long-term growth.



4 hours

BtoC SOLUTIONS

Inventory & Price Management

Participants Will Explore:

Revenue Growth Comes from Managing Availability and Pricing Together: Successful revenue managers don't rely on pricing alone. They make deliberate decisions about which room types to sell, when to sell them, and at what price, ensuring inventory is aligned with demand and customer value.

The Right Inventory Should Be Available to the Right Customer: Different guests value different room features, locations, bed types, and packages. Effective inventory management matches these preferences with available room products, helping maximize both guest satisfaction and revenue performance.

Pricing Strategies Should Support Value, Not Just Occupancy: Strong revenue managers strive to sell as many rooms as possible at full value while using discounts strategically when needed. The goal is not simply to fill rooms, but to optimize revenue through thoughtful pricing decisions and clear value propositions.

Forecasting and Discipline Drive Better Revenue Results: Effective inventory and price management require accurate forecasting, smart use of room restrictions, proactive upselling, and careful monitoring of demand. Organizations that manage these factors consistently improve revenue, profitability, and long-term business performance.



4 hours

BtoC SOLUTIONS

Distribution & Channel Management

Participants Will Explore:

The Right Distribution Channel Helps Deliver the Right Customer: Revenue managers use a variety of channels to connect products, pricing, and customer segments. Effective channel management ensures the right offer reaches the right customer while supporting revenue growth and long-term business goals.

Not All Revenue Is Created Equal: A room sold through different distribution channels may generate very different financial results. Strong revenue managers evaluate channel performance based on both revenue generated and the costs required to acquire that business, focusing on maximizing net revenue rather than volume alone.

Direct Relationships Create Stronger Long-Term Value: Direct bookings, repeat guests, group sales, and other low-cost channels help organizations build stronger customer relationships while reducing distribution expenses. These channels often provide greater control over pricing, communication, and the overall customer experience.

Successful Revenue Managers Balance Reach, Cost, and Customer Experience: Distribution channels should expand market reach without sacrificing profitability or customer loyalty. Effective leaders continuously evaluate channel performance, manage inventory strategically, and ensure distribution decisions support both customer value and long-term business performance.



4 hours

BtoC SOLUTIONS

Data Analysis & Revenue Management

Participants Will Explore:

Data Helps Revenue Managers Make Better Decisions: Strong revenue management starts with using the right information at the right time. Revenue managers collect, organize, analyze, and apply data so pricing, inventory, staffing, and customer decisions are based on facts instead of guesswork.

Useful Data Comes from Multiple Sources: Effective analysis includes information from the property, third-party partners, and customers. This may include sales history, booking pace, financial results, market reports, online reviews, and customer feedback that help leaders understand both business performance and customer experience.

Technology Should Make Revenue Decisions Clearer, Not More Complicated: New tools can help automate tasks, improve analysis, and support better decision-making, but technology only adds value when it produces insights leaders can understand and use. Strong revenue managers choose tools that improve accuracy, save time, and support practical business action.

Data Must Be Managed Responsibly: Revenue managers must protect customer information, maintain accurate records, and monitor how customers talk about the business online. When data is secure, reliable, and connected to real customer needs, it becomes a powerful tool for improving revenue, service, and long-term performance.



4 hours

BtoC SOLUTIONS

Evaluation of Revenue Management Efforts in Lodging

Participants Will Explore:

Successful Revenue Management Is Measured by Profit, Not Just Revenue: Strong revenue managers look beyond occupancy and room rates alone. Effective evaluation requires balancing occupancy, ADR, revenue, distribution costs, and profitability to ensure pricing decisions contribute to long-term business performance rather than simply filling rooms.

The Best Revenue Decisions Balance Occupancy and Rate: High occupancy does not automatically mean success, and high room rates do not guarantee strong performance. Revenue managers must evaluate both together, using metrics such as RevPAR, NRevPAR, RevPOR, GOPPAR, and Flow-Through to understand the true impact of their decisions.

Performance Should Be Measured Against the Competition: Evaluating results in isolation can be misleading. Effective revenue managers compare occupancy, ADR, RevPAR, and market share performance against their competitive set to determine whether they are capturing their fair share of available business.

Revenue Optimization Requires Continuous Evaluation and Adjustment: Successful organizations regularly assess customer segments, distribution channels, online reputation, and profitability trends. Leaders who use this information to refine pricing, improve value, and strengthen customer loyalty are best positioned to improve both revenue performance and long-term profitability.



4 hours

Revenue Management for Food & Beverage Service

Participants Will Explore:

Successful Foodservice Pricing Should Focus on Value, Not Just Cost: Traditional pricing methods often begin with food costs and work upward, but effective revenue management starts with the value guests perceive. Customers do not pay for an operation's costs—they pay for the experience, convenience, service, and value they receive.

Revenue Growth Depends on Both Price and Sales Volume: Foodservice revenue is driven by the relationship between menu prices and the number of items sold. Raising prices without increasing perceived value can reduce demand, while strategic pricing decisions can improve both revenue and profitability.

Differential Pricing Creates Opportunities to Optimize Revenue: Just as hotels adjust pricing based on demand, foodservice operators can use factors such as time of day, customer type, service level, bundling, menu variations, and seating capacity to better align prices with customer value perceptions and willingness to pay.

Customer Value Is Influenced by More Than the Food Itself: Service quality, ambiance, portion size, product presentation, convenience, location, and overall experience all shape a guest's perception of value. Revenue managers who understand these factors can create pricing strategies that strengthen guest satisfaction while improving long-term profitability.



4 hours

BtoC SOLUTIONS

Evaluation of Revenue Management in Food & Beverage

Participants Will Explore:

Effective Revenue Management Measures More Than Menu Sales: Successful revenue managers look beyond individual menu items and evaluate where revenue comes from, how it changes over time, and how efficiently the operation generates sales. This broader view helps leaders make better decisions about pricing, staffing, promotions, and resource allocation.

Revenue Growth Should Be Evaluated Carefully: Increases and decreases in revenue should be analyzed alongside guest counts, check averages, operating days, and pricing changes. Strong revenue managers focus on identifying true business growth rather than relying solely on higher sales dollars that may be driven by price increases alone.

Understanding Revenue Sources Improves Decision-Making: Successful operators regularly evaluate revenue by revenue center, day part, and service style. By understanding which areas generate the most income, leaders can identify opportunities to improve performance, increase customer value, and strengthen profitability.

Revenue Efficiency Is Just as Important as Revenue Generation: High-performing organizations monitor key measures such as Revenue per Square Foot, Revenue per Labor Hour, and Revenue per Available Seat Hour (RevPASH). These metrics help leaders maximize facility usage, improve labor productivity, increase seat utilization, and generate stronger long-term financial results.



4 hours

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Specialized Applications of Revenue Management

Participants Will Explore:

Revenue Management Works Best When Supply Is Limited and Demand Varies: Organizations can apply revenue management most effectively when they have constrained capacity, high fixed costs, predictable demand patterns, and inventory that cannot be stored or recovered once unused. Understanding these conditions helps leaders identify opportunities to improve both customer value and business performance.

Revenue Optimization Is about Matching Value with Customer Needs: Effective revenue managers use product versions, pricing options, packages, and distribution channels to serve different customer segments. The goal is not simply to charge more, but to align pricing, availability, and value with what different customers need and are willing to pay.

Successful Revenue Strategies Must Be Simple and Easy to Communicate: Even the best pricing strategy will fail if employees cannot explain it or customers do not understand it. Strong revenue managers create pricing programs that are logical, transparent, and easy to communicate, helping customers recognize the value they receive.

Revenue Management Extends Beyond Individual Properties: Revenue professionals may support multiple locations, franchise systems, brand partners, or destination marketing organizations. In these roles, they help drive performance through forecasting, pricing strategy, training, partnership management, and collaboration across the broader organization.



4 hours

BtoC SOLUTIONS

Building Better Business

Participants Will Explore:

Revenue Growth Starts with Creating Better Business, Not Just More Business: Effective revenue managers focus on the quality of revenue they generate, not simply the quantity. Strong decisions balance revenue, profitability, customer value, and the long-term reputation of the organization.

Pricing Is One of the Most Powerful Tools for Improving Performance: Strategic pricing influences customer perceptions, strengthens profitability, improves forecasting accuracy, and supports better business decisions. Organizations that understand customer value and price accordingly are better positioned for long-term success.

Every Department Plays a Role in Revenue Success: Revenue optimization is most effective when sales, marketing, operations, accounting, distribution, and revenue management work toward the same goals. Clearly defined responsibilities help create a consistent customer experience and stronger business results.

Sustainable Growth Requires Honest Evaluation and Continuous Improvement: Successful organizations regularly assess their products, services, pricing strategies, market conditions, and employee capabilities. Leaders who invest in training, understand their competitive position, and adapt to changing market conditions are best equipped to build stronger businesses in both good times and challenging times.



4 hours

BtoC SOLUTIONS

Hospitality Revenue Management Master Class

Participants Will Explore:

Revenue Management Creates Value, Not Just Revenue: Successful hospitality leaders understand how customer value, pricing, forecasting, demand management, and customer behavior work together to drive profitability. The foundation of revenue management is matching the right product, to the right customer, at the right price, at the right time while creating value for both the guest and the organization.

Strategic Pricing and Revenue Optimization Drive Business Performance: Effective revenue managers use value-based pricing, differential pricing, inventory management, demand forecasting, distribution channel management, and data analysis to maximize revenue and profitability. Rather than relying on discounts or guesswork, they make informed decisions that improve financial results while protecting the guest experience.

Data, Forecasting, and Performance Measurement Improve Decision-Making: Strong revenue leaders analyze market conditions, customer behavior, competitive performance, lodging and food & beverage metrics, and operational results to make better decisions. By measuring outcomes and continuously evaluating results, they identify opportunities to improve revenue, profitability, efficiency, and customer satisfaction.

Building Better Business Requires Leadership and Organizational Alignment: Sustainable success comes when sales, marketing, operations, finance, and revenue management work toward common goals. Leaders who focus on customer value, employee development, strategic pricing, continuous improvement, and long-term profitability create stronger organizations that perform successfully in both strong and challenging market conditions.



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***Accelerate** Your Success.*

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