



2025 ENVISION GROUP TRAINING PROGRAM OVERVIEW



January 2025

Subject: 2025 Envision Group Training Program Overview

I am pleased to present Envision's 2025 Training Program Overview. This overview includes detail on five (5) existing Envision leader & team development programs that have been delivered to Energy industry association members for the past 25 years. This overview also includes two (2) updated ESG training programs, and seven (7) newly innovated leader & team development titles that have been requested by industry leaders for your consideration.

As a leading professional training and development solutions provider, our Envision team is committed to delivering high-quality training programs that empower individuals, teams, and organizations to enhance the skills needed to achieve goals in today's complex marketplace.

Executive Summary: Envision Group International is a leading training workshop provider committed to delivering high-quality professional development solutions to individuals and organizations. With over 25+ years of training experience in various industries including the Energy Industry, we have successfully facilitated numerous workshops across various sectors, empowering participants to enhance skills, knowledge, and most important, results.

Our training workshops are carefully designed to with feedback from industry leaders to address the evolving needs of professionals in today's competitive landscape. We offer various topics and modules catering to different industries and job functions, ensuring participants receive relevant and practical training. Our workshops combine interactive learning methodologies, engaging activities, real-world case studies, together with seasoned, expert facilitation to create a dynamic and impactful learning experience.

Key Features of Our Training Workshops:

- **Expert Facilitators:** Our experienced trainers bring industry knowledge and expertise to each workshop. They are skilled in creating a supportive and engaging learning environment, fostering active participation and knowledge exchange among participants.
- **Customization:** We understand that every organization has unique training requirements. Therefore, we offer the flexibility to tailor our workshops to meet specific needs, incorporating industry-specific examples, case studies, and challenges. This ensures that participants gain practical skills and insights that can be directly applied to their roles.

Key Features of Our Training Workshops - Continued:

- **Practical Approach:** Our workshops focus on practical application, providing participants with strategies they can implement immediately. Through hands-on exercises, group discussions, and interactive simulations, we enable participants to practice new skills and reinforce their learning.
- **Current and Relevant Content:** We stay abreast of industry trends and best practices to ensure our workshop content is up-to-date and relevant. We continually refine our materials to reflect emerging challenges and opportunities, equipping participants with the knowledge and skills to stay ahead in their fields.
- **Comprehensive Support:** Our commitment to participant success extends beyond the workshop itself. We provide comprehensive post-workshop support, including access to resources, follow-up consultations, and ongoing learning opportunities to help participants sustain their growth and development.

Clients engaged in our training workshops have reported tangible benefits, including improved job performance, enhanced team collaboration, increased productivity, and greater confidence in handling complex tasks. We have successfully partnered with companies of all sizes, ranging from startups to Fortune 100 companies, across diverse industries, cultures & countries.

Training Methodology: when delivering an engaging and effective learning experience, it is important to utilize a variety of training methodologies and instructional strategies. Here is an outline of some commonly used approaches:

- **Interactive Presentations:** Combining informative content with engaging visuals, multimedia elements, and storytelling techniques to capture participants' attention and facilitate understanding.
- **Case Studies:** Presenting real or hypothetical scenarios that require participants to analyze, problem-solve, and apply their knowledge and skills to practical situations.
- **Group Discussions:** Encouraging participants to actively participate in group discussions, sharing their perspectives, experiences, and insights. These discussions produce meaningful dialogue and promote critical thinking.
- **Role-Playing and Simulations:** Using role-playing activities or simulations to create realistic workplace scenarios. This allows participants to practice skills, decision-making, and problem-solving in a controlled and supportive environment.
- **Experiential Learning:** Providing hands-on experiences that allow participants to learn by doing. This can include workshops, demonstrations, guided exercises, or on-the-job training involving participants in the learning process.
- **Action Planning:** Guiding participants in developing action plans that outline how they will apply the knowledge and skills learned in training to their work environment. This fosters accountability and ensures a transfer of learning.
- **Technology-Enabled Learning:** Utilizing technology tools such as learning management systems, virtual classrooms, online modules, or mobile applications to deliver content, facilitate interactions, and provide resources for self-paced learning.

- **Feedback and Professional Coaching:** Incorporating feedback mechanisms from trainers and peers to provide participants with constructive feedback on their progress and performance. Offer coaching or mentoring opportunities to support individual growth and development.

Training Logistics: The Client is responsible for covering the workshop room set-up with the configuration required as 3-5 participants per workshop table in a suitable workshop meeting room. Round tables are preferred.

- Audio-visual equipment -- includes laptop projector, projection screen, sound system, and meeting room internet access, and 1 x papered flipchart.

Training Investment & Fee Structure:

Two (2) Day Program Investment

- \$2,900 USD per participant per **2-day workshop**.
- All program workbooks are \$299 USD per participant workbook.
- Includes one (1) complimentary Executive/Leadership coaching sessions per attendee post-workshop (value of \$950 USD per coaching session).

Three (3) Day Program Investment

- \$3900 per participant per **3-day workshop**.
- All program workbooks are \$399 USD per participant workbook.
- Includes three (1) complimentary Executive/Leadership coaching sessions per attendee post-workshop (value of \$950 USD per coaching session).

Client Responsibilities: All fees noted above are quoted in US Dollars. When delivered in-person, room set up, air travel (bus. class), accommodation, transfers, room rental fees, food & beverage, AV rental, material shipping, laptop projector, screen and one (1) papered flip chart expenses for 1 Envision facilitator are the responsibility of the client.

Additional Client expenses may include:

- Workshop materials (lanyard name tags, place cards, sign-in sheet).
- Meals, coffee, meeting-style beverages, and incidentals.

Terms and Conditions: Cancellation of any course/event will be advised by Client at least two weeks before the scheduled date in writing.

- Each program will be invoiced at 50% of proposed program and workbook fees based on number of planned participants and is payable before scheduled program delivery dates. The final 50% of program and workbook fees will be invoiced after program delivery together with all Envision expenses and is due 30 days from the final day of program delivery.
- Non-attendance ("no-show") will be invoiced as confirmed registrants. In the case of "no-show participants, a similar "per participant credit" will be given for future program attendees from the Client company.

Conclusion:

We at Envision believe our on-going history of partnerships success within the Energy Industry, and our expertise and commitment to excellence industry validated training makes us the ideal training partner. We are confident that our mix training program and post workshop coaching will deliver the tools and accountability needed to enable long-term, tangible, and lasting value to each participant who contributes to the growth and success of your organization.

Please do not hesitate to contact us with any questions or to discuss this proposal further. We appreciate the opportunity to be considered for this training program/workshop and look forward to working together.

Thank you for your time and consideration.

Sincerely,
Envision Group International.

A handwritten signature in black ink, appearing to read "Pat Lipovski". The signature is fluid and cursive, with a large initial "P" and "L".

Mr. Patrick (Pat) Lipovski, Founder & CEO

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Existing 2025 Training Programs

200 Level – Engaging & Influential Leader is our most popular program, and a comprehensive course designed to equip participants with the fundamental knowledge, skills, and strategies required to excel as effective leaders & mentors in diverse professional settings. This 3-day course empowers individuals to confidently lead and create positive feedback, develop coaching/mentoring skills, and enhancing influence and impact within their teams. Participants will explore various topics from understanding how to deliver feedback while excelling as a developmental leader, coaching principles and mastering the art of influence.

Training Agenda:

Day 1&2:

Module 1: What is Leadership

Module 2: When Generations Collide

- Introducing the Generations.
- Motivating Workers by Generation.
- Tips For Leading a Multigenerational Group.

Module 3: Understanding Your Leadership Style (part 1)

- Leadership Style Assessment.
- Effective vs. Ineffective Leaders.
- Turning Coaching into Engaging Conversations.

Module 4: Understanding Your Leadership Style (part 2) - Continued

- Pros and Cons of Problem-Solving Leaders.
- Six Philosophies of Engagement.
- The Power of Why (linking Simon Sinek's golden circle to engagement).

Module 5: Engaging with Vision

- Step One: "Visualize" where they want to be and WHY.
- Step Two: "Identify" where they are now.
- Step Three: "Seek" Options.
- Step Four: "Inspire" a Plan.
- Step Five: Overcoming "Obstacles" & Objections.
- Step Six: "Next" Steps.

Day 2& 3:

Module 6: Goal Setting Using ISMART

- Goal Setting and Accountability.
- Use the iSMART Technique.

Module 7: Listening with Intention

- The Process of Communication.
- Types of Listening.
- Six Steps to Active Listening.
- Barriers to Listening and Strategies to Overcome Them.
- Strategies For Effective Listening.

Module 8: Feedback In the Workplace (part 1)

- Giving and Receiving Feedback. – Review 3 Types of Feedback
- Employee Feedback Statistics.

Module 9: Mastering Feedback In the Workplace (part 2)

- Using the Envision Feedback Model – Role play & practice.

Module 8: The Art of Influence

- Influence Style Assessment.
- Influence, trust, and planning Conversations.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

This course suits individuals new to senior management roles, or for aspiring to become managers and experienced managers who want to enhance their leadership skills and knowledge to become effective executives.

Facilitator Skills:

- Strong facilitation and training delivery skills, engaging participants and creating a positive learning environment.
- Excellent verbal and written communication skills, with the ability to explain complex concepts clearly and concisely.
- Skilled in coaching and providing feedback to individuals and teams.

Approach:

- Takes a learner-centered approach, focusing on participant engagement, interaction, and practical application of concepts.
- Creates a safe and inclusive learning environment where participants feel comfortable sharing ideas and asking questions.
- Incorporates a variety of training methods, such as group activities, case studies, and simulations, to cater to different learning styles.
- Emphasizes the importance of real-world application and provides participants with tools and resources to implement their learning in their work environments.
- Encourages continuous improvement and supports participants beyond the training program through post-training resources and follow-up sessions.

Training Outcomes:

Upon completing this 2-day course on **Engaging & Influential Leader** participants will be able to:

- Define and articulate the concept of leadership in various contexts.
- Recognize and understand the impact of generational differences in the workplace and employ strategies to bridge the generational gap.
- Identify their leadership style and leverage their strengths as a leader.
- Evaluate the characteristics of effective leaders and avoid common pitfalls of ineffective leadership.
- Develop a personal coaching philosophy and apply coaching techniques in leadership scenarios.
- Uncover their purpose and vision, align it with organizational goals, and inspire others through a compelling vision.
- Utilize the coaching process of visualizing success, setting goals, generating options, overcoming obstacles, and defining the next steps.
- Set SMART goals for themselves and their teams, monitor progress, and hold themselves and others accountable.
- Communicate effectively as a leader, including active listening, adapting communication styles, and navigating difficult conversations.
- Provide positive, developmental and corrective feedback to enhance performance, deliver feedback effectively, and create a culture of continuous feedback and growth.
- Employ techniques for influencing and persuading others, negotiation skills, and managing conflicts and difficult conversations.
- Build strong relationships and networks to enhance leadership effectiveness.

Through interactive exercises, case studies, and discussions, participants will gain practical skills and knowledge that can be immediately applied in their leadership roles. They will leave the course equipped with the tools and insights needed to navigate generational differences, unlock their coaching potential, and excel as influential leaders in their respective fields.

Program: Engaging & Influential Leader 2-Day Training

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by Diversified Operations Corp, which holds the copyright under the name "**Engaging and Influential Leader.**"

- The Client agrees to respect the copyright ownership of all training content.
- Envision, and the Client agrees not to disclose any item discussed and shared during workshop sessions and agree to comply with all relevant privacy laws.

100 Level - Management & Leadership Essentials 2-Day Training

This 2-day course focuses on behavioral styles and their impact on leadership, different leadership styles and their appropriate applications, effective people development, delivering feedback, conflict resolution, mastering change, goal setting, and organizational communication. Participants will develop the necessary skills and knowledge to enhance their new and emerging leadership capabilities and their methods and drive for organizational success.

Training Agenda:

Day 1: Morning

Module 1: Trust – Your Competitive Advantage

Module 2: The Basics of Leadership

- Leadership Skills for the 21st Century.
- Leadership Styles.

Module 3: Understanding Behavioral Styles and Their Impact on Effective Leadership

- Introduction to Behavioral Styles Assessment Tools.
- Analyzing Different Behavioral Styles and Their Strengths.
- Adapting Leadership Approaches to Different Styles.
- Effective People Development through Feedback.

Day 1: Afternoon

Module 4: Effective People Development

- **Effective People Engagement.**
- Four Leadership Styles.

Module 5: Mastering Change

- What Is Change Management?
- Benefits of Change Management.
- What Drives Organizational Change?
- 3 Types of Organizational Change.
- Key Benefits of Adhering to Best Practices in Change Management.
- Understanding the Basics of Change Management Models.
- What Is a Change Management Model?
- Five Fundamental Change Management Models.

Day 2: Morning

Module 6: Feedback

- Importance of continuous feedback in employee growth.
- Giving and receiving constructive feedback.
- Developing coaching skills to support employee development.

Module 7: Conflict Resolution

- Understanding the sources and types of workplace conflicts.
- Strategies for constructively resolving conflicts.
- Mediation techniques and fostering collaboration.

Module 8: Goal Setting

- Setting SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals.
- Aligning individual and team goals with organizational objectives.
- Monitoring progress and providing support for goal attainment.

Day 2: Afternoon

Module 9: Strategies for Effective Communication

- Enhancing communication skills for effective leadership.
- Active listening and empathy-building techniques.
- Managing difficult conversations and communicating with impact.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

This course suits individuals new to management roles or aspiring to become managers and experienced managers who want to enhance their leadership skills and knowledge.

Training Outcomes:

Upon completion of the Management & Leadership Essentials 2-day training program, participants will be able to:

- **Understand Behavioral Styles and their Impact on Effective Leadership:**
 - Assess and recognize different behavioral styles in themselves and others.
 - Adapt leadership approaches and communication styles to engage and motivate individuals with different behavioral preferences effectively.
 - Foster a positive and inclusive work environment by leveraging the strengths of diverse behavioral styles.

- **Apply Different Leadership Styles in Relevant Situations:**
 - Identify and understand various leadership styles (e.g., Democratic, Coercive, Authoritative, Affiliative, Pacesetter, and Coaching) and their advantages and limitations.
 - Determine the appropriate leadership style to apply in different situations and team dynamics.
 - Effectively lead teams and individuals by adapting leadership styles to support their growth and performance.
- **Foster Effective People Development through Feedback:**
 - Provide constructive feedback to individuals to support their professional growth and development.
 - Create a culture of continuous feedback and coaching within the organization.
 - Utilize coaching techniques to empower and develop employees, enhancing their skills and performance.
- **Resolve Conflicts Constructively:**
 - Identify the sources and types of conflicts that arise in the workplace.
 - Apply conflict resolution strategies to resolve conflicts fairly and constructively.
 - Facilitate open communication and collaboration among team members to prevent and manage conflicts effectively.
- **Master Change Management:**
 - Understand the stages of the change process and the challenges associated with organizational change.
 - Develop effective change management strategies to minimize resistance and foster a smooth transition.
 - Lead and inspire teams through change by effectively communicating the vision and benefits of the change initiative.
- **Set and Achieve Goals:**
 - Set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals that align with organizational objectives.
 - Monitor progress towards goals and provide necessary support and resources to ensure successful goal attainment.
 - Enable individuals and teams to take ownership of their goals and track their progress effectively.
- **Enhance Communication Skills:**
 - Improve communication skills, including active listening, empathy, and non-verbal communication.
 - Effectively manage difficult conversations and resolve conflicts through clear and concise communication.
 - Communicate with impact to inspire and motivate teams, ensuring a shared understanding of goals and expectations.

Program: 100 Level - Management & Leadership Essentials 2 Day Training

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Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name "**Management & Leadership Essentials.**"

- The Client agrees to respect the copyright ownership of all training content.
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300 Level - Envision Strategic & Branded Leader/Executive 3-Day Training: This dynamic course combines the essential elements of strategic planning, the path to market leadership, and the development of executive presence. Participants will explore the foundations of strategic planning, gain insights into effective strategies for achieving market leadership and learn how to cultivate a strong executive presence that commands respect and influence. By integrating these critical areas, this course equips participants with a comprehensive skill set to lead their organizations to success in a competitive business landscape.

Training Agenda:

Day 1 & 2: Strategic Planning

Module 1: Introduction to Strategic Planning

- Statistics-Why Corporate Strategy Breaks Down.
- Path to Market Leadership:
 - Operational Excellence.
 - Customer Intimacy.
 - Product Leadership.

Module 2: Initial Assessment

- Common Planning Mistakes.
- Review a Previous Plan and Start the Initial Assessment.
- Mission/Purpose.
- Vision.
- Values.

Module 3: Situation Analysis

- Introduction to Situation Analysis.
- External Environment Analysis.
- Internal Environment Analysis.
- Understanding PEST or P.E.S.T.E.L. Analysis.
- SWOT Analysis.

Module 4: Strategy Formulation

- Pillars (Strategic Priorities), Objectives, and Goals.
- Objectives.
- Goals.
- Best Practice for Goals.
- Structuring the Plan.
- What is a Balanced Scorecard, and How Does it Work?
- Benefits of Using a Balanced Scorecard.
- Building Your Balanced Scorecard.
- Strategy Map.

Day 3: Executive Branding

Module 1: What is a Personal Brand?

- **Think of Yourself as A Product.**
- **Identify and Strengthen your Current Brand.**
- **Brand Mantra.**
- **Steps to Develop Your Brand Mantra.**

Module 2: How Do You Strengthen Your Brand?

- **Connecting with Influence - Building Your Physical Presence.**
- **Introduction to Influence Mapping.**
- **Plan your Influence Strategy.**
- **Influencing Styles.**
- **What is your Influencing Style?**
- **Persuasive Reasoning.**

Module 3: Planning Your Conversations

Creating a Conversation Planner.

Module 4: Building Your Virtual Executive Presence (social media)

Your Path to Social Leadership: Personal Branding.

LinkedIn - Express Your Brand.

Twitter (X): Why and how to use

Tips to Remember When Developing Your Social Media Pages.

Module 5: My Bigger Future Plan

- **My Leadership Template.**
- **My Executive Presence Branding Focus.**
- **You Have 7 Seconds to Make a First Impression.**

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

- **Business Leaders and Executives:** Senior-level executives, C.E.O.s, and business leaders who want to enhance their strategic planning skills, gain insights into achieving market leadership, and develop a strong executive presence to lead their organizations effectively.

- **Aspiring Leaders:** Individuals aspiring to leadership roles or seeking to enhance their leadership abilities. This course can provide them with the knowledge and skills necessary to excel in strategic planning, understand the path to market leadership, and develop a commanding executive presence.
- **Entrepreneurs and Small Business Owners:** Those who own or manage small businesses and startups can benefit from understanding strategic planning principles and the strategies required to achieve market leadership. The course can help them make informed decisions, position their businesses for growth, and develop their executive presence for effective leadership.
- **Middle Managers and Team Leaders:** Individuals in middle management or team leadership positions who want to enhance their strategic thinking, decision-making, and leadership skills. The course can give them the tools to contribute to their organization's strategic planning process and develop their executive presence to inspire and motivate their teams.
- **Professionals in Strategy and Planning Roles:** Those working in strategy, planning, or business development roles within organizations can deepen their understanding of strategic planning and gain insights into the path to market leadership. The course can help them contribute effectively to strategic initiatives and enhance their executive presence for greater influence and impact.

Training Outcomes:

Upon completion of this course, participants will achieve the following training outcomes:

- **Comprehensive Understanding of Strategic Planning:** Participants will develop a thorough understanding of strategic planning concepts, frameworks, and best practices. They can analyze the internal and external environment, set organizational goals and objectives, formulate effective strategies, and translate them into actionable plans.
- **Strategic Decision-Making and Execution:** Participants will acquire the skills to make informed strategic decisions based on data and insights. They will learn to evaluate risks and opportunities, create actionable strategic plans, allocate resources efficiently, and overcome obstacles to execute their strategies effectively.
- **Enhanced Executive Presence:** Participants will learn how to cultivate a strong executive presence that commands respect, influences others, and inspires confidence. They will develop effective communication and interpersonal skills, improve their self-awareness and personal brand as leaders, and learn strategies to build trust and credibility with stakeholders.
- **Networking and Stakeholder Engagement:** Participants will develop the skills to build effective professional networks and engage key stakeholders. They will learn strategies for leveraging networks to form strategic alliances and partnerships, influence and negotiate across diverse groups, and create a networked organization for increased collaboration and innovation.

By achieving these outcomes, participants will have the knowledge, skills, and mindset necessary to lead their organizations to market leadership, make strategic decisions, and cultivate an executive presence that influences and inspires others.

Program: Envision Strategic and Branded Leader/Executive

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Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name "Envision Strategic & Branded Leader/Executive" or "Envision Your Professional Brand."

- The Client agrees to respect the copyright ownership of all training content.
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Finance for Non-Financial Professionals 2-Day Training. This comprehensive course provides non-financial professionals with a solid financial principles and concepts foundation. Participants will gain the knowledge and skills to understand and analyze financial information, make informed business decisions, and effectively communicate with financial stakeholders. From understanding financial statements to evaluating investment opportunities, this course will empower participants to navigate the financial aspects of their roles confidently and contribute to their organization's financial success.

Training Agenda:

Day 1: Morning

Introduction to Accounting & Finance

- **Understanding the Basics of Finance.**
- **Relationship Between Accounting and Finance.**

Module 1: Introduction to Balance Sheets

- **The Balance Sheet - What is it?**
- **Balance Sheet Components.**

Day 1: Afternoon

Module 3: Cashflow Statements

- **Why Understanding Cashflow is Important for Non-Financial Managers.**
- **Key Terms and Concepts to Know.**
- **Summing Up the Statements.**

Module 4: Using Statements to Measure Financial Health

- **Why is Understanding Ratios Important?**
- **Financial Ratios – The Benefits.**
- **Financial Ratios – The Limitations.**
 - What is a Balanced Scorecard, and How Does it Work?
 - Benefits of Using a Balanced Scorecard.
 - Building Your Balanced Scorecard.

Day 2: Morning

Module 5: Working Capital Management

- **Why Is Working Capital Management Crucial?**

Module 6: Budgeting

- **Essentials of a Good Budget.**
- **Types of Budgets.**

- **The Budgeting Process.**
- **6 Easy Steps to Create a Business Budget.**
- Day 2: Afternoon

Module 7: Break-Even Analysis for Key Financial Decisions

- **Cost Behavior - Variable and Fixed Costs.**
- **Terms and Methodologies Used in Capex Evaluation – Cash Flow.**

Module 8: Types of Financing

- **Your Business Finance Options.**
- **Types of Lenders.**

Module 9: Auditing

- **What is Auditing?**
- **Audit Process.**
- **Levels of Audit Engagement.**

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The target audience for the course includes:

- **Non-Financial Managers and Leaders:** Managers and leaders from various functional areas, such as operations, marketing, human resources, and technology, do not have a finance background but need to understand financial concepts to make informed business decisions and effectively manage their departments.
- **Entrepreneurs and Small Business Owners:** Individuals who are starting or managing their businesses and need to grasp finance fundamentals to effectively manage their company's finances, analyze financial statements, create budgets, and make strategic financial decisions.
- **Professionals in Non-Finance Roles:** Professionals working in non-finance roles, such as project managers, consultants, engineers, and analysts, need to enhance their financial literacy to collaborate effectively with finance professionals, understand the financial implications of their projects or initiatives, and contribute to financial planning and decision-making.
- **Cross-Functional Team Members:** Individuals who work as part of cross-functional teams or have regular interactions with finance professionals, such as sales representatives, product managers, and procurement officers, and want to understand financial language, concepts, and analysis to improve communication, align objectives, and contribute to financial discussions.

- **Aspiring Professionals: Individuals seeking to transition into finance-related roles, such as financial analysts, financial consultants, or finance managers. This course can provide them with a solid foundation in finance fundamentals and serve as a stepping stone for further education or career development.**

It's important to note that this course assumes no prior knowledge of finance and is designed to cater to individuals who have limited experience with financial concepts. The course content and examples will be presented in a way that is accessible and relevant to professionals from various industries and backgrounds.

Training Outcomes:

Upon completion of this course, participants can expect to achieve the following training outcomes:

- **Financial Literacy: Participants will develop a solid understanding of finance principles, concepts, and terminology. They will gain the knowledge necessary to speak the language of finance and understand financial discussions and reports.**
- **Financial Statement Analysis: Participants will acquire the skills to analyze financial statements and understand the financial health of an organization. They can interpret financial ratios, identify trends and patterns, and assess a company's financial performance and stability.**
- **Budgeting and Forecasting: Participants will learn how to develop budgets, create financial forecasts, and analyze variances. They will understand the importance of budgeting in financial planning and be able to use budgeting and forecasting information to make informed decisions and evaluate performance.**
- **Financial Planning and Decision Making: Participants will learn to integrate financial considerations into decision-making. They will understand the role of financial planning in setting goals and objectives, forecasting future financial performance, and aligning financial decisions with strategic objectives.**
- **Financial Communication: Participants will develop communication skills to convey financial information to non-financial stakeholders. They will learn how to present financial data clearly and concisely, translate complex financial concepts into understandable terms, and effectively communicate the financial implications of business decisions.**

By achieving these outcomes, participants will be equipped with the necessary knowledge and skills to navigate financial aspects within their roles, contribute to the financial success of their organizations, and make informed business decisions based on financial analysis and insights.

Program: Finance for Non-Financial Professionals

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name "**FNFP-Finance for Non-Financial Professionals.**"

- The Client agrees to respect the copyright ownership of all training content.
- Envision, and the Client agrees not to disclose any item discussed and shared during workshop sessions and agree to comply with all relevant privacy laws.

Advanced Business Development and Sales. This course is designed to equip sales professionals with the necessary skills and strategies to excel in professional sales. Participants will learn effective techniques to identify and target ideal customers, establish meaningful connections, clarify customer needs and motivations, compel clients to take action, confirm client engagement, and nurture long-term relationships. The course emphasizes the importance of becoming a trusted customer advisor, resulting in loyal clients championing their brand.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Professional Sales

Module 2: Understanding Yourself And Others

- What kind of business development or salesperson are you?
- Understanding personality profiles for business development and selling.
- Introduction to understanding yourself and others with DISC.
- Guide to effectively reading people using DISC.
- Adapting your approach.
- Body language.

Module 3: Introduction To The 7Cs Of Business Development And Sales

- Understanding the 7Cs of business development and sales success.

Module 4: The 1st C – Choose

- Create a clear ideal customer profile.
- Strategies to choose & find customers.

Day 1: Afternoon

Module 5: The 2nd C - Connect

- Creating your professional positioning statement (P.P.S.).
- Building & managing relationships.
- Emotional intelligence - what is it?
- Research client opportunities.
- Managing your professional brand online and in real-time.
- Building your virtual executive presence (social media).
- Professional relationship grid.
- Setting your client's "sales" strategy.
- Components of a sales funnel.

Day 2: Morning

Module 6: The 3rd C – Clarify The What And The Why

- Assist trainees in confirming their reason why and their emotional purpose.
- Active listening.
- Listening barriers.

Module 7: The 4th C - Compel

- Benefits of having a sales funnel.
- Ten steps to cleaning up and reigniting your sales funnel.
- Business development & sales - consultative to insightful.
- Putting insight into B.D. and sales.
- Collaboration.
- Developing an influential strategy.
- Introduction to influence mapping.
- Strategies to establish an agreement to proceed.
- Presentations.
- Proposals.

Module 8: THE 5TH C – Confirm (part 1)

- Client Opportunity Assessment and Strategy Development.
- Understanding Organizational Structure & the Planning Process.
- Assessing the Previous Year's Business and Establishing an Agreement to Proceed.
- S.W.O.T.
- Analyzing Your Competition & Setting a Clear Marketing Strategy.
- Setting A Clear Market Strategy.
- Developing and Communicating Clear Positioning using the Power/Interest Grid.
- Turning Obstacles into Opportunity.
- The Two Types of Objections.
- Living Above the Line.
- Client On-Boarding That Drives Clarity, Alignment, and Loyalty.
- Turning Suspects into Trusted Strategic Partners.

Day 2: Afternoon

Module 8: The 5th C – Confirm (part 2) - Continued

- Sales Negotiation Fundamentals.
- Why is negotiation so important in sales?
- The Negotiation Process.
- Differentiators.
- What is B.A.T.N.A.?
- What is ZOPA?
- Using an Issue Matrix.
- Illustration of B.A.T.N.A.
- Example of B.A.T.N.A.

- Identifying Your B.A.T.N.A.
- Analyzing the Other Side's B.A.T.N.A.

Module 9: The 6th C – Continue

- Goal Setting.
- Set Goals, not Limits.
- Introducing iSMART Goal Setting.
- Time Management.
- Return on Time Invested (R.O.T.I.).
- Which Customers Give You the Best R.O.T.I.?
- Keeping and Expanding Market Share.
- Managing Key Accounts.

Module 10: The 7th C – Champion

- Learn From Your Losses & Celebrate Your Wins.
- Customer Engagement Strategy.
- Create an Influential Conversation Planner.
- Reassessing the 7 C's. Where are you now?

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

This course suits individuals new to management roles or aspiring to become managers and experienced managers who want to enhance their leadership skills and knowledge.

Training Outcomes:

Upon completion of this course, participants will be able to:

- Understand the fundamentals of professional sales and apply key elements of successful sales strategies.
- Identify and adapt to different personality styles in sales, build rapport, and establish client trust.
- Develop an ideal customer profile (I.C.P.) and effectively target clients who will be most successful, deliver maximum return on investment (R.O.I.), and reduce churn.
- Analyze industry, size, location, budget, revenue, number of employees, potential users, and complementary solutions of long-time clients who have succeeded with their solutions and have seen growth.
- Utilize various strategies to connect with clients, including leveraging customer referrals, engaging with professional associations and groups, collaborating with industry influencers and guests, and networking with alums, teams, or other clubs.
- Understand and clarify customer needs, uncovering the "what" and "why" behind their decisions and establishing emotional purposes.
- Compel clients to act using one-word associations and compelling questions that trigger engagement and create a sense of urgency.

- Recognize buying signals from clients, overcome objections, and establish agreements to proceed with the client.
- Nurture and expand client relationships by maintaining exceptional communication, a positive attitude, and exceeding expectations.
- Act as a trusted advisor to clients, building trust and cultivating client loyalty and advocacy.

By achieving these outcomes, participants will be equipped with advanced sales techniques and strategies to enhance their sales performance, build strong client relationships, and achieve long-term success in their professional sales careers.

Program: Advanced Business Development and Sales

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name "**Advanced Business Development and Sales: Using the 7 Cs.**"

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- Envision, and the Client agrees not to disclose any item discussed and shared during workshop sessions and agree to comply with all relevant privacy laws.

Updated 2025 Programs (ESG) - Course Duration: 2 Day Training Programs

100 Level - Sustainable Future: ESG Training Program. The Sustainable Future: ESG Training Program is a comprehensive training program designed to help individuals and organizations understand and integrate Environmental, Social, and Governance (ESG) principles into their business practices. By adopting ESG principles, businesses can collectively drive positive change, improve long-term sustainability, and enhance stakeholder value. This program aims to provide participants with the knowledge, skills, and tools necessary to navigate the complex landscape of ESG and leverage it for success.

Training Agenda:

Day 1: Morning

Module 1: Introduction to ESG

- Understanding the concept of ESG.
- The importance of ESG in the modern business landscape.
- The link between ESG and financial performance.
- Exploring the global ESG frameworks and standards (e.g., UN Sustainable Development Goals, Global Reporting Initiative, SASB, TCFD, etc.).
- Case studies showcasing successful ESG implementation.

Module 2: Environmental (E) Factors

- Identifying and managing environmental risks and opportunities.
- Climate change and its impact on businesses.
- Sustainable resource management.
- Energy efficiency and renewable energy solutions.
- Waste reduction and circular economy practices.

Day 1: Afternoon

Module 3: Leadership and Management Development

Module 4: Social (S) Factors

- Stakeholder engagement and community involvement.
- Human rights, labor practices, and fair employment.
- Diversity, equity, and inclusion (DEI) in the workplace.
- Supply chain management and responsible sourcing.
- Philanthropy and social impact initiatives.

Module 5: Governance (G) Factors

- Corporate governance best practices.
- Board composition, independence, and diversity.
- Transparency and accountability in decision-making.
- Anti-corruption measures and ethical business conduct.
- Investor relations and shareholder engagement.

Day 2: Morning

Module 6: Industry-Based Sustainability Disclosure Standards

- Understanding the structure, content, and applicability of each standard.
- Sustainability Accounting Standards Board (SASB) – Now IFRS Sustainability.
- Global Reporting Initiative (GRI).
- Task Force on Climate-related Financial Disclosures (TCFD).
- Carbon Disclosure Project (CDP).

Module 7: ESG Reporting and Metrics

- Understanding ESG reporting frameworks and disclosure requirements.
- Developing ESG metrics and key performance indicators (KPIs).
- Tools and software for ESG data collection, analysis, and reporting.
- Communicating ESG performance to stakeholders.
- External assurance and audit processes for ESG reporting.

Day 2: Afternoon

Module 8: Integrating ESG into Business Strategy

- Incorporating ESG considerations into strategic planning.
- ESG integration across different departments and functions.
- Embedding ESG principles into risk management and decision-making processes.
- Creating an ESG roadmap and implementation plan.
- Aligning ESG goals with sustainable development objectives.

Module 9: Engaging Stakeholders and Investor Relations

- Developing an effective stakeholder engagement strategy.
- Engaging with investors and responding to their ESG expectations.
- Building trust and credibility through transparent communication.
- ESG ratings, indices, and benchmarks.
- Capitalizing on ESG-related investment opportunities.

Module 10: Measuring the Impact of ESG

- Evaluating the impact of ESG initiatives.
- Assessing the financial implications of ESG integration.
- Identifying and addressing challenges and barriers to implementation.
- Continuous improvement and adaptive management in ESG practices.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The "Sustainable Future: ESG Training Program" is designed for individuals and organizations interested in understanding and implementing Environmental, Social, and Governance (ESG) principles. The program caters to both professionals and decision-makers across various sectors, including:

- **Business Leaders and Executives:**
 - CEOs, CFOs, and other C-suite executives seeking to integrate ESG principles into their organization's strategic decision-making processes.
 - Business owners and entrepreneurs looking to build sustainable business models from the ground up.
 - Corporate sustainability and responsibility professionals in control of driving ESG initiatives within their organizations.
- **Sustainability and CSR Practitioners:**
 - Sustainability managers and consultants responsible for implementing ESG practices and reporting within organizations.
 - CSR professionals aim to enhance their understanding of ESG frameworks and standards to improve sustainability reporting and stakeholder engagement.
 - Professionals involved in social impact investing and sustainable finance initiatives.
- **Nonprofit and Civil Society Organizations:**
 - Sustainability officers and leaders within nonprofit organizations looking to align their practices with ESG principles.
 - Advocacy groups and civil society organizations interested in understanding ESG frameworks to engage with businesses and promote responsible practices.
 - Foundations and grant-makers interested in integrating ESG considerations into their grant-making strategies.

This training program aims to provide valuable insights and tools for individuals and organizations across sectors, empowering them to navigate the ESG landscape, drive positive change, and contribute to building a sustainable future.

Training Outcomes:

By completing the " Sustainable Future: ESG Training Program," participants will be able to:

- Understand the concept of ESG and its significance in the modern business landscape.
- Identify and evaluate the environmental, social, and governance factors relevant to their organization or industry.
- Recognize the link between ESG performance and financial value creation.
- Familiarize themselves with global ESG frameworks and standards, such as GRI, SASB, TCFD, and UN SDGs.
- Integrate ESG considerations into strategic decision-making processes and business models.
- Apply ESG metrics and key performance indicators (KPIs) to measure and track sustainability performance.
- Develop an understanding of ESG reporting requirements and frameworks and effectively disclose ESG information.
- Engage with stakeholders and communicate ESG initiatives transparently and effectively.
- Assess and manage environmental risks, including climate change and resource management.

- Address social factors such as labor practices, human rights, diversity, equity, and inclusion.
- Implement effective corporate governance practices that align with ESG principles.
- Understand the role of sustainable finance and ESG investing in driving positive change.
- Evaluate the impact of ESG initiatives and measure progress towards sustainability goals.
- Identify and address challenges and barriers to implementing ESG practices.
- Develop a roadmap and implementation plan for integrating ESG principles into organizational strategies.
- Stay current with emerging trends and developments in ESG and sustainability reporting.

By achieving these learning outcomes, participants will have the knowledge, skills, and tools to navigate the complex ESG landscape, drive positive change within their organizations, and contribute to building a sustainable future.

Program: 100 Level - Sustainable Future: ESG Training Program 2-Day Training

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat. lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name " **Sustainable Future: ESG Training Program.**"

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200 Level - Sustainable Pathways: ESG Implementation Program is a comprehensive framework designed to help organizations integrate Environmental, Social, and Governance (ESG) practices into their core business operations. This program aims to promote sustainable development, drive positive social impact, and enhance long-term value creation for all stakeholders. By adopting the Sustainable Pathways framework, companies can align their strategies, policies, and practices with sustainability principles, contributing to a more equitable and resilient future.

Training Agenda:

Day 1: Morning

Module 1: Assessing the Current State

- Conduct an in-depth assessment of the organization's ESG performance, policies, and disclosure practices.
- Identify gaps and areas for improvement through a materiality analysis, benchmarking against industry peers, and stakeholder engagement.

Module 2: Establishing Governance Structures

- Formulate a dedicated ESG governance structure integrating ESG considerations into the organization's decision-making processes.
- Appoint a cross-functional ESG task force or committee overseeing the implementation program and monitoring progress.

Day 1: Afternoon

Module 3: Developing a Clear ESG Strategy

- Define a comprehensive ESG strategy that aligns with the organization's mission, values, and long-term goals.
- Identify key ESG priorities and set ambitious yet achievable targets for each focus area (environmental, social, and governance).

Module 4: Embedding ESG into Operations

- Integrate ESG considerations into core business functions, such as procurement, supply chain management, product development, and risk management.
- Develop and implement ESG-related policies, guidelines, and performance metrics to ensure consistent implementation and monitoring.

Day 2: Morning

Module 5: Enhancing Stakeholder Engagement

- Identify and engage with key stakeholders, including investors, customers, employees, local communities, NGOs, and regulators.
- Establish ongoing dialogue, feedback, and collaboration mechanisms to understand stakeholder expectations and address their concerns.

Module 6: Strengthening ESG Reporting and Transparency

- Enhance the organization's ESG reporting practices, following internationally recognized frameworks (e.g., Global Reporting Initiative, SASB, TCFD).
- Ensure accurate, reliable, and timely reporting of ESG metrics and progress towards goals, providing transparency to stakeholders.

Day 2: Afternoon

Module 7: Building Capacity and Awareness

- Provide comprehensive ESG training and education programs for employees at all levels, fostering a culture of sustainability and responsibility.
- Raise awareness among employees about the organization's ESG commitments and encourage their active participation in ESG initiatives.

Module 8: Monitoring, Evaluation, and Improvement

- Establish a robust monitoring and evaluation system to track the organization's ESG performance and progress toward targets.
- Regularly review and refine the ESG strategy, policies, and practices based on emerging trends, new regulations, and stakeholder feedback.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The audience for the "**Building a Sustainable Future: ESG Training Program**" can include professionals and organizations from various backgrounds, including:

- **Business Executives and Leaders:**
 - CEOs, CFOs, and other C-suite executives.
 - Business owners and entrepreneurs.
 - Sustainability and corporate responsibility professionals.
- **Sustainability and CSR Practitioners:**
 - Sustainability managers and consultants.
 - CSR professionals.
 - Social impact investing professionals.

The program caters to individuals and organizations across sectors who are interested in understanding and integrating ESG principles into their operations, decision-making processes, and reporting. The audience may vary in their current knowledge and experience with ESG, ranging from beginners seeking foundational knowledge to experienced professionals looking to enhance their expertise.

Training Outcomes:

Upon completion of the "**Building a Sustainable Future: ESG Training Program**," participants will be able to:

- Understand the key concepts and principles of ESG (Environmental, Social, and Governance) and their importance in driving sustainability and responsible business practices.
- Identify and assess the relevant ESG factors and their impacts within their industry or organization.
- Recognize the link between ESG performance and long-term value creation, including financial, reputational, and operational aspects.
- Comprehend global ESG frameworks and standards, such as GRI, SASB, TCFD, and UN SDGs, and understand their application to various sectors.
- Develop the skills to integrate ESG considerations into strategic decision-making, risk management, and business operations.
- Implement effective ESG measurement and reporting practices, including identifying and tracking ESG performance indicators and targets.
- Engage with stakeholders, including investors, customers, employees, and communities, to effectively communicate ESG initiatives and address their expectations and concerns.
- Assess and manage environmental risks and opportunities, such as climate change, resource efficiency, and pollution prevention.
- Address social factors within their organization and supply chain, including labor practices, human rights, diversity, equity, and inclusion.
- Understand the importance of strong corporate governance and ethics in ESG integration and develop strategies for enhancing governance practices.
- Explore and leverage sustainable finance and responsible investment strategies to drive positive ESG outcomes.
- Analyze and interpret ESG data and reports to evaluate the performance and progress of their organization's sustainability initiatives.
- Identify and overcome challenges and barriers to ESG integration, such as resistance to change, resource constraints, and lack of awareness.
- Develop an action plan for implementing and continuously improving ESG practices within their organization, aligned with their specific goals and priorities.
- Stay informed about emerging trends, regulations, and best practices in the ESG landscape, and adapt strategies accordingly.

By achieving these learning outcomes, participants will have the knowledge and skills to effectively incorporate ESG considerations into their organization's operations, strategy, and reporting, contributing to sustainable and responsible business practices.

Program: 200 Level - Sustainable Pathways: ESG Implementation Program

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name " **Sustainable Pathways: ESG Implementation Program.**"

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Proposed New 2-Day Programs for 2025

Accelerate Team Excellence: Building a High-Performing Team. The "Accelerate Team Excellence" program is a comprehensive team development initiative designed to foster collaboration, enhance communication, and unleash the full potential of teams. This program aims to create a high-performing team that consistently delivers exceptional results.

Training Agenda:

Day 1: Morning

Module 1: Establishing a Shared Team Vision

- Defining the team's purpose, mission, and values.
- Create a compelling team vision.
- Aligning individual goals with the team vision.

Module 2: Effective Communication and Active Listening

- Enhancing verbal and non-verbal communication skills.
- Practicing active listening techniques.
- Improving clarity and transparency in team communication.

Day 1: Afternoon

Module 3: Building Trust and Psychological Safety

- Understanding the importance of trust in team dynamics.
- Building trust through vulnerability and authenticity.
- Creating a psychologically safe environment for open communication and risk-taking.

Module 4: Collaboration and Teamwork

- Promoting collaboration and cooperation among team members.
- Leveraging individual strengths for collective success.
- Developing effective team decision-making processes.

Day 2: Morning

Module 5: Accountability and Performance Management

- Establishing clear roles, responsibilities, and performance expectations.
- Implementing performance measurement and feedback mechanisms.
- Encouraging personal ownership and accountability within the team.

Module 6: Problem-Solving and Decision-Making

- Introducing problem-solving frameworks and methodologies.
- Enhancing critical thinking and analytical skills.
- Facilitating group decision-making processes.

Module 7: Diversity and Inclusion in Team Settings

- Understanding the value of diversity and inclusion.

- Addressing unconscious bias and fostering inclusivity.
- Leveraging diverse perspectives for innovation and creativity.

Day 2: Afternoon

Module 8: Conflict Resolution and Constructive Feedback

- Recognizing and managing conflicts within the team.
- Developing effective conflict resolution strategies.
- Providing and receiving constructive feedback for growth and improvement.

Module 9: Evaluation and Program Sustainability

- Assessing team progress and measuring program effectiveness.
- Gathering feedback for program improvement.
- Creating a plan for sustaining team development efforts.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The target audience for the "Accelerate Team Excellence" program can vary depending on the specific organization and its needs. However, the program is generally beneficial for teams across industries and sectors, including:

- **Corporate Teams:** This includes cross-functional teams within large corporations, departments, project teams, or executive teams aiming to enhance collaboration, communication, and performance.
- **Startups and Entrepreneurial Teams:** Founders, co-founders, and early-stage teams seeking to establish a strong foundation for growth, effective communication, and teamwork.
- **Nonprofit Organizations:** Teams within nonprofit organizations working towards a shared mission, including program teams, fundraising teams, and volunteer coordination teams.
- **Small and Medium-sized Enterprises (SMEs):** Teams within small and medium-sized businesses seeking to improve teamwork, communication, and productivity.
- **Virtual or Remote Teams:** Distributed teams that work remotely or across different geographical locations, aiming to strengthen collaboration, trust, and communication in a virtual environment.
- **Project Teams:** Cross-functional teams working on specific projects with defined deliverables, looking to optimize their teamwork and achieve project success.
- **Educational Institutions:** Faculty teams, administrative teams, or student teams within educational institutions interested in enhancing collaboration, communication, and problem-solving skills.

It's important to note that the program can be tailored to suit each target audience's specific dynamics, goals, and challenges, ensuring maximum relevance and effectiveness.

Training Outcomes:

The "Accelerate Team Excellence" program is designed to deliver various outcomes that contribute to developing a high-performing team. The specific outcomes will depend on the

team's starting point, goals, and program duration. Here are some common outcomes that can be expected:

- **Shared Team Vision:** The team will establish a compelling shared vision that aligns team members towards a common purpose and inspires them to work collaboratively towards a common goal.
- **Improved Communication:** Team members will enhance their communication skills, including active listening, assertive communication, and clarity in conveying information, resulting in better understanding and reduced miscommunication.
- **Trust and Collaboration:** The team will develop trust and psychological safety, enabling members to share ideas, express concerns, and collaborate effectively. This fosters a supportive environment where team members feel comfortable taking risks and working together towards shared objectives.
- **Accountability and Performance:** The program will establish clear roles, responsibilities, and performance expectations, increasing individual and team accountability. Team members will take ownership of their tasks, deliverables, and outcomes, improving performance and productivity.
- **Effective Problem-Solving:** The team will develop problem-solving skills, including identifying and analyzing problems, generating innovative solutions, and making well-informed decisions. This will enable the team to overcome challenges and drive continuous improvement.
- **Diversity and Inclusion:** The program will promote diversity, inclusion, and cultural sensitivity within the team. Team members will value and leverage diverse perspectives, leading to enhanced creativity, better decision-making, and a more inclusive work environment.
- **Conflict Resolution:** Team members will acquire skills and strategies for addressing conflicts constructively. They will learn to manage conflicts, seek common ground, and use disagreements as opportunities for growth and understanding.
- **Team Cohesion and Engagement:** As a result of the program, team cohesion and engagement will increase. Team members will feel a stronger sense of belonging, motivation, and job satisfaction, leading to higher performance and overall team success.

Program: Accelerate Team Excellence: Building a High-Performing Team

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name " **Accelerate Team Excellence: Building a High-Performing Team.**"

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Team Alignment: Navigating Storming, Norming, and Performing. The Team Transformation course provides participants with the knowledge, skills, and strategies to navigate the stages of team development – storming, norming, and performing – and build highly effective and cohesive teams. By understanding the dynamics of each stage and applying proven techniques, participants will learn how to enhance communication, collaboration, and productivity within their teams. Through interactive activities, discussions, and real-world case studies, participants will develop the essential skills to create a positive team culture, resolve conflicts, establish trust, and achieve exceptional results.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Team Development Stages

- Overview of the storming, norming, and performing stages.
- Understanding the dynamics and challenges of each stage.
- Importance of effective teamwork and its impact on team performance.

Module 2: Storming Stage: Embracing Conflict and Building Trust

- Recognizing signs of storming within a team.
- Strategies for managing conflicts and disagreements constructively.
- Building trust and establishing psychological safety within the team.

Day 1: Afternoon

Module 3: Storming Stage: Effective Communication and Collaboration

- Enhancing team communication skills.
- Active listening and empathy-building techniques.
- Collaboration strategies for effective problem-solving.

Module 4: Norming Stage: Establishing Team Norms and Roles

- Defining shared values, norms, and expectations.
- Clarifying roles and responsibilities within the team.
- Setting guidelines for decision-making and accountability.

Day 2: Morning

Module 5: Norming Stage: Developing Trust and Cohesion

- Strengthening trust through team-building activities.
- Encouraging open and transparent communication.
- Fostering a sense of belonging and team identity.

Module 6: Performing Stage: Enhancing Team Productivity

- Leveraging individual strengths for collective success.
- Effective delegation and task management strategies.
- Aligning team goals with organizational objectives.

Day 2: Afternoon

Module 7: Performing Stage: Sustaining High Performance

- Strategies for maintaining momentum and motivation.
- Continuous improvement and learning culture within the team.
- Celebrating achievements and fostering a positive team culture.

Module 8: Action Planning and Next Steps

- Reflecting on the team's journey and growth.
- Identifying strengths and areas for improvement.
- Creating an action plan for ongoing development and success.
- Resources and tools for continued team growth and support.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The audience for the training program can vary depending on the specific needs and context of the organization. However, the program is primarily designed for teams and team members within an organization who are seeking to improve their collaboration, communication, and performance. This can include:

- **Project Teams:** Teams responsible for delivering specific organizational projects or initiatives.
- **Departmental Teams:** Teams within a specific department or functional area, such as marketing, finance, human resources, or operations.
- **Cross-Functional Teams:** Teams comprised of members from different departments or areas of expertise who collaborate on specific projects or goals.
- **Leadership Teams:** Teams consisting of managers or leaders responsible for driving the overall strategy and performance of the organization.
- **Virtual Teams:** Teams that work remotely or across different geographical locations rely on virtual collaboration tools for communication and coordination.

Training Outcomes:

By the end of this course, participants will be able to:

- Understand the stages of team development – storming, norming, and performing – and their impact on team dynamics and performance.
- Recognize and manage conflicts and disagreements within the team constructively.
- Enhance communication skills to foster effective team interactions, active listening, and feedback exchange.
- Establish clear roles, responsibilities, and norms within the team for improved collaboration and clarity.
- Build trust and psychological safety within the team to create an environment conducive to open communication and idea-sharing.

- Apply techniques for effective decision-making, problem-solving, and consensus-building within the team.
- Leverage diversity and inclusivity to harness the collective strengths of team members.
- Develop strategies for sustaining high performance, continuous improvement, and learning within the team.
- Celebrate achievements and provide recognition to foster a positive team culture.
- Navigate through team development stages with resilience and adaptability, overcoming challenges and setbacks.

Program: Team Alignment: Navigating Storming, Norming, and Performing

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Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name " **Team Alignment**" "**Team Transformation**", "**Navigating Storming, Norming, and Performing**".

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Employee Engagement: Your Key to Retention course aims to enhance employee satisfaction, motivation, and overall organizational engagement. This program will provide participants with a comprehensive understanding of employee engagement, its importance, and practical strategies to foster a positive work environment. Through interactive sessions, discussions, and activities, employees will learn effective techniques to create a culture of engagement and maximize their engagement levels.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Employee Engagement

- Welcome and program overview.
- Importance of employee engagement.
- Key drivers of engagement.
- Understanding the employee engagement cycle.

Module 2: Leadership's Role in Employee Engagement

- The impact of leadership on engagement.
- Strategies for creating an engaged leadership team.
- Empowering employees through effective leadership practices.

Day 1: Afternoon

Module 3: Enhancing Employee Motivation and Satisfaction

- Understanding individual motivators.
- Creating a positive work environment.
- Implementing work-life balance initiatives.

Module 4: Effective Communication and Employee Recognition

- Importance of transparent and effective communication.
- Providing constructive feedback.
- Recognizing and rewarding employee contributions.

Day 2: Morning

Module 5: Building a Collaborative Work Culture

- Promoting teamwork and collaboration.
- Encouraging knowledge sharing and cross-functional cooperation.
- Leveraging diversity and inclusion for increased engagement.

Module 6: Resilience and Stress Management

- Developing resilience skills.
- Managing stress and preventing burnout.
- Supporting employee well-being.

Day 2: Afternoon

Module 7: Implementing Engagement Initiatives

- Creating action plans for team engagement.
- Strategies for engaging remote or distributed teams.
- Overcoming challenges in implementing engagement initiatives.

Module 8: Measuring and Evaluating Employee Engagement

- Identifying appropriate metrics and surveys.
- Analyzing and interpreting engagement data.
- Using feedback to drive continuous improvement.

Module 9: Wrap-up and Action Planning

- Recap of key takeaways.
- Reflection on personal and organizational goals.
- Creating individual action plans for implementing engagement strategies.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The Employee Engagement: Your Key to Retention course is designed for a wide range of audiences within an organization, including:

- **Managers and Supervisors:** Those in leadership positions are critical in fostering employee engagement. This program will equip managers and supervisors with the necessary skills and strategies to engage their teams and create a positive work environment effectively.
- **Human Resources Professionals:** HR professionals are often responsible for designing and implementing engagement initiatives. This program will give them a deeper understanding of employee engagement and practical tools to develop and execute effective engagement strategies.
- **Team Leaders:** Team leaders at all levels can benefit from the program by learning how to enhance employee motivation, communication, and collaboration within their teams, leading to higher engagement levels and improved team performance.
- **Employee Engagement Committees:** Organizations with established employee engagement committees or similar groups can send their members to the program to gain knowledge, exchange ideas, and develop action plans to improve employee engagement.
- **Cross-functional Teams:** Employees from different departments or teams can participate in the program together, fostering a collaborative environment and promoting engagement across various areas of the organization.
- **Any Employee:** While the program is particularly valuable for individuals in leadership or managerial positions, it can also benefit employees at all levels. By understanding the importance of engagement and learning strategies to enhance their engagement, employees can contribute to a positive work culture and personal growth.

Training Outcomes:

Upon completing the Employee Engagement: Your Key to Retention course, participants can expect to achieve the following outcomes:

- **Enhanced Understanding:** Participants will have a comprehensive understanding of employee engagement, its significance, and the key drivers that contribute to it.
- **Increased Engagement Levels:** Participants will be equipped with practical strategies and techniques to foster a positive work environment and enhance their engagement levels.
- **Improved Leadership Skills:** Participants will understand the crucial role of leadership in employee engagement and develop the skills necessary to become engaged leaders who empower and motivate their teams.
- **Motivated and Satisfied Employees:** Participants will learn how to identify individual motivators, create a positive work environment, and implement work-life balance initiatives to enhance employee motivation and satisfaction.
- **Effective Communication and Recognition:** Participants will gain skills in transparent and effective communication, providing constructive feedback, and recognizing and rewarding employee contributions, leading to improved communication and increased employee engagement.
- **Collaborative Work Culture:** Participants will understand the importance of teamwork and collaboration and learn strategies to foster a culture of collaboration that encourages engagement and knowledge sharing.
- **Resilience and Stress Management:** Participants will develop resilience skills and learn effective stress management techniques, enabling them to cope with challenges, prevent burnout, and support employee well-being.
- **Implementation of Engagement Initiatives:** Participants can create action plans to implement engagement initiatives within their teams, overcome challenges, and foster engagement in remote or distributed teams.
- **Measurement and Evaluation:** Participants will learn how to measure and evaluate employee engagement using appropriate metrics and surveys, enabling them to gather valuable feedback and drive continuous improvement in engagement levels.
- **Positive Organizational Impact:** By applying the knowledge and strategies gained from the program, participants will create a culture of engagement within the organization, resulting in increased productivity, higher employee satisfaction, reduced turnover, and improved overall organizational performance.

It is important to note that the specific outcomes may vary depending on the organization's context and the participant's engagement in the program. Regular evaluations and follow-ups can further assess the program's effectiveness and ensure the desired outcomes are achieved.

Program: Employee Engagement: Your Key to Retention

Agreement to Proceed: Signatures below indicate acceptance to proceed with the agreed scope of work.

Please authorize and return to - pat.lipovski@envisiongroup.ca

Client:

Name:

Title:

Date:

Signature:

Billing Address:

Training Company: Envision Group Ltd.

Lead Facilitator Name: Pat Lipovski, CEO

Title: Lead Facilitator

Date:

Signature:

Additional Terms and Conditions for this program: The program is developed by *Diversified Operations Corp*, which holds the copyright under the name " **Employee Engagement: Your Key to Retention.**"

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The Enhancing Employee Retention program is designed for professionals in human resources, talent management, and organizational development roles and managers and supervisors responsible for employee engagement and retention within their organizations. The program is also valuable for business owners and executives who want to understand the importance of employee retention and develop strategies to reduce turnover.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Employee Retention

- Importance of employee retention.
- Cost of turnover and its impact on organizations.
- Factors influencing employee retention.

Module 2: Creating a Positive Work Environment

- Building a culture of trust, respect, and inclusivity.
- Effective communication and active listening skills.
- Conflict resolution and problem-solving techniques.

Day 1: Afternoon

Module 3: Leadership and Management Development

- Developing leadership skills to inspire and motivate employees.
- Coaching and mentoring techniques for employee growth.
- Performance management and feedback strategies.

Module 4: Career Development and Growth Opportunities

- Assessing employee career aspirations and goals.
- Identifying internal career paths and advancement opportunities.
- Skill development programs and training resources.

Day 2: Morning

Module 5: Work-Life Balance and Employee Well-being

- Importance of work-life balance in employee retention.
- Strategies for managing workload and time effectively.
- Stress management and resilience-building techniques.

Module 6: Recognition and Rewards

- The significance of recognition in employee retention.
- Types of recognition and reward systems.
- Providing regular and timely feedback.

Day 2: Afternoon

Module 7: Organizational Culture and Values

- Reinforcing the organization's mission, vision, and values.

- Promoting diversity, equity, and inclusion.
- Team-building activities for strengthening relationships.

Module 8: Employee Engagement and Feedback

- Strategies to enhance employee engagement and motivation.
- Collecting and acting upon employee feedback.
- Building strong employee-manager relationships.

Module 9: Retention Action Plan

- Creating individualized retention action plans for employees.
- Monitoring progress and making necessary adjustments.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The Employee Engagement Training Program is designed for a wide range of audiences within an organization, including:

- Managers and supervisors responsible for employee development, engagement, and retention within the organization. The course suits individuals in various industries and organizations of different sizes. Managers and supervisors will benefit from learning strategies and techniques to create a positive work environment, develop leadership skills, and effectively engage and retain their team members.
- Human resources professionals will gain insights and practical tools to design and implement employee retention initiatives and support managers in their retention efforts.
- Executives and leaders who want to understand the importance of employee retention and contribute to creating a supportive work culture. By attending this training, participants will enhance their understanding of employee retention and acquire practical skills to implement effective strategies that support employee engagement and long-term retention.

Training Outcomes:

By the end of this training course, participants will be able to:

- Understand the importance of employee retention and its impact on organizational success.
- Identify the factors influencing employee retention and recognize their role in addressing them.
- Create a positive work environment that fosters trust, respect, and inclusivity.
- Develop effective communication and active listening skills to enhance employee-manager relationships.
- Apply conflict resolution and problem-solving techniques to address workplace issues.
- Develop leadership and management skills to inspire, motivate, and support employee growth.

- Implement performance management and feedback strategies to enhance employee performance.
- Promote career development and growth opportunities to engage and retain employees.
- Establish work-life balance initiatives and promote employee well-being.
- Implement effective recognition and reward systems to appreciate employee contributions.
- Foster a culture that aligns with organizational values and promotes diversity and inclusion.
- Engage employees through feedback mechanisms and continuous improvement strategies.

Program: Enhancing your Employee Retention

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Billing Address:

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Mastering Process & Productivity: Strategies for Peak Performance. This course is a comprehensive program designed to equip participants with the skills and strategies needed to maximize their productivity and achieve peak performance in their personal and professional lives. This course will blend theoretical knowledge, practical techniques, and hands-on exercises to ensure a transformative learning experience. Participants will develop a solid foundation in productivity principles and acquire actionable strategies to enhance efficiency, focus, and overall effectiveness.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Productivity

- Understanding productivity and its significance.
- Exploring productivity theories and models.
- Identifying personal productivity challenges.

Module 2: Goal Setting and Planning

- Setting SMART goals for personal and professional growth.
- Prioritization techniques and task analysis.
- Creating action plans and setting milestones.

Day 1: Afternoon

Module 3: Time Management and Organization

- Effective time allocation and scheduling strategies.
- Overcoming procrastination and managing distractions.
- Tools and techniques for personal organization and decluttering.

Day 2: Morning

Module 4: Task and Project Management

- Breaking down projects into manageable tasks.
- Utilizing project management methodologies (e.g., Agile, Kanban).
- Tracking progress and adapting to changes.

Module 5: Focus and Concentration

- Techniques to improve concentration and avoid multitasking.
- Implementing the Pomodoro Technique and other focus-enhancing practices.
- Creating a work environment that is optimal for concentration.

Module 6: Effective Listening

- Techniques to improve listening skills needed to be an affective leader.

Day 2: Afternoon

Module 7: Effective Communication and Collaboration

- Enhancing communication skills for clarity and efficiency.
- Active listening and feedback techniques.
- Collaborative tools and strategies for productive teamwork.

Module 8: Stress Management and Energy Optimization

- Stress reduction techniques and mindfulness practices.
- Maintaining work-life balance and promoting well-being.
- Strategies for optimizing energy levels and productivity.

Module 9: Accountability and Motivation

- Establishing accountability systems and structures.
- Techniques for self-motivation and overcoming setbacks.
- Building support networks and peer accountability partnerships.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The Mastering Productivity: Strategies for Peak Performance course is designed for individuals from various backgrounds and professional levels seeking to enhance their productivity and achieve peak performance. The course is suitable for the following:

- **Professionals:** Employees, managers, entrepreneurs, and executives who want to improve their productivity in the workplace, manage their time effectively, and achieve better results in their careers.
- **Students:** High school, college, and university students who aim to optimize their study habits, manage their time efficiently, and excel academically.
- **Freelancers and Remote Workers:** Individuals working independently or remotely who desire to establish effective work routines, manage their projects efficiently, and maintain high productivity in flexible work environments.
- **Small Business Owners:** Entrepreneurs and small business owners who want to maximize their efficiency, streamline their workflows, and effectively manage their time and resources to drive business growth.
- **Individuals Seeking Personal Growth:** People interested in personal development, self-improvement, and achieving their goals with increased productivity and time management skills.

Training Outcomes:

Upon completing the "Mastering Productivity: Strategies for Peak Performance" course, participants can expect to achieve the following outcomes:

- **Enhanced Productivity Skills:** Participants will develop a strong foundation in productivity principles and acquire practical techniques to boost their efficiency, prioritize tasks effectively, and achieve better outcomes in their personal and professional lives.
- **Goal Clarity and Achievement:** Participants will learn to set meaningful and achievable goals aligning with their values and priorities. They can divide goals into actionable steps, create strategic action plans, and track progress effectively, leading to increased success.
- **Effective Time Management:** Participants will acquire time management strategies to optimize their daily routines, eliminate time-wasting activities, and allocate time efficiently to tasks and projects. They will learn techniques to overcome procrastination, manage distractions, and maximize their available time.
- **Proficient Task and Project Management:** Participants will develop skills in breaking down complex projects into manageable tasks, establishing clear priorities, and effectively managing deadlines and deliverables. They will gain insights into project management methodologies and tools to track progress and adapt to changing circumstances.
- **Improved Focus and Concentration:** Participants will learn techniques to enhance their focus and concentration, enabling them to work with increased attention and efficiency. They will understand how to minimize distractions, implement focused work sessions, and create an optimal environment for concentration.
- **Streamlined Workflows and Automation:** Participants will gain insights into workflow analysis and optimization, identifying inefficiencies and streamlining processes. They will learn to align repetitive tasks, leverage technology & productivity tools improve efficiency.
- **Effective Communication and Collaboration:** Participants will enhance their communication skills, such as ensuring clarity, active listening, and providing effective feedback. They will understand strategies for productive collaboration and teamwork, leading to better coordination and increased productivity in group settings.
- **Stress Management and Well-being:** Participants will learn techniques to manage stress, maintain energy levels, and promote overall well-being. They will acquire strategies for work-life balance, self-care, and mindfulness practices to reduce stress and increase resilience.
- **Cultivation of Productive Habits:** Participants will develop strategies to cultivate positive habits that support productivity. They will understand the power of routines, self-discipline, and habit formation, enabling them to sustain long-term productivity and achieve consistent results.
- **Accountability and Motivation:** Participants will learn methods to stay accountable to their productivity goals, overcome setbacks, and stay motivated in facing challenges. They will explore techniques for self-motivation, establish accountability systems, and build support networks to maintain their productivity journey.

By the end of the course, participants will have the knowledge, skills, and tools necessary to enhance their productivity, achieve peak performance, and create a sustainable framework for continued personal and professional success.

Program: Mastering Process & Productivity: Strategies for Peak Performance

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Title: Lead Facilitator

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Navigating the Multi-Generational Workplace. The Navigating the Multi-Generational Workplace course is designed to provide participants with the knowledge and skills needed to thrive in a workplace composed of multiple generations. The course will explore the unique characteristics, communication styles, values, and expectations of different generational cohorts and offer strategies for fostering collaboration, understanding, and harmony among colleagues of all ages. Participants will gain practical insights and learn tools to effectively navigate the multi-generational dynamics in their workplace, enhance productivity, and promote a positive work environment.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Generational Diversity

- Definition and importance of generational diversity in the workplace.
- Overview of generational cohorts (e.g., Baby Boomers, Generation X, Millennials, Generation Z).
- Understanding the formative experiences and historical events that shape each generation.

Module 2: Characteristics and Values of Generational Cohorts

- Examining the unique characteristics, motivations, and expectations of each generation.
- Exploring the diverse values, work styles, and attitudes toward authority and work-life balance.
- Breaking down generational stereotypes and biases.

Day 1: Afternoon

Module 3: Communicating Across Generations

- Understanding the impact of generational differences on communication styles.
- Overcoming communication barriers and misinterpretations.
- Developing effective listening skills and empathy in intergenerational conversations.

Module 4: Fostering Collaboration and Understanding

- Strategies for building cross-generational relationships and mentorship opportunities.
- Leveraging the strengths and perspectives of each generation for teamwork and innovation.
- Creating an inclusive and supportive environment for all generations.

Day 2: Morning

Module 5: Bridging the Generational Gap

- Identifying common ground and shared goals among different generations.
- Adapting leadership styles to manage multi-generational teams effectively.
- Encouraging knowledge-sharing and learning across generations.

Module 6: Managing Conflict and Resolving Differences

- Addressing conflicts arising from generational differences.
- Techniques for constructive dialogue and negotiation.
- Implementing conflict resolution strategies that promote collaboration.

Day 2: Afternoon

Module 7: Cultivating a Multi-Generational Workplace Culture

- Promoting diversity, equity, and inclusion across generations.
- Developing policies and practices that cater to the needs of different generations.
- Encouraging ongoing learning and adaptation to evolving generational dynamics.

Module 8: Action Planning

- Setting personal & organizational goals for better multi-generational dynamics.
- Creating an action plan to implement strategies and initiatives discussed in the course.
- Identifying opportunities for continued growth and learning.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

This course is designed for professionals at all levels in multi-generational workplaces:

- **Managers and Team Leaders:** Those responsible for leading and supervising teams of multiple generations.
- **Human Resources Professionals:** HR personnel in talent management, diversity and inclusion, and employee engagement initiatives.
- **Employees:** Individuals from various backgrounds want to enhance their understanding of generational diversity and improve workplace communication and collaboration skills.
- **Trainers and Facilitators:** Learning and development professionals who aim to deliver training on multi-generational workplace dynamics.
- **Organizational Leaders:** Executives, managers, and project owners who seek to create an inclusive work environment that leverages the strengths of different generations.

Training Outcomes:

By the end of the course, participants will be able to:

- Recognize the characteristics and values of different generational cohorts.
- Understand how generational diversity impacts the workplace and its dynamics.
- Overcome generational stereotypes and biases to build inclusive teams.
- Communicate effectively with colleagues from different generations.
- Identify strategies to bridge generational gaps and foster collaboration.
- Leverage generational diversity to enhance problem-solving and innovation.
- Develop strategies for managing multi-generational conflict and resolving differences.
- Promote a positive and inclusive work culture that values all generations.

Program: Mastering Productivity: Strategies for Peak Performance

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Succession Planning: Ensuring Smooth Transitions for Organizational Continuity. This course provides participants with a comprehensive understanding of succession planning and its critical role in maintaining organizational continuity. Participants will learn the key principles, strategies, and best practices for identifying, developing, and transitioning talented individuals to key leadership positions within their organizations. The course will cover talent assessment, leadership development, employee engagement, and effective knowledge transfer to ensure a seamless succession process.

Training Agenda:

Day 1: Morning

Module 1: Introduction to Succession Planning

- Definition and importance of succession planning.
- Benefits and challenges of effective succession planning.
- Linking succession planning to organizational strategy and goals.

Module 2: Talent Assessment and Identification

- Identifying critical roles and positions.
- Succession planning metrics and benchmarks.

Day 1: Afternoon

Module 3: Leadership Development and Succession Readiness

- Identifying potential successors and high-potential employees.
- Individual development plans and career pathways.
- Coaching and mentoring for leadership development.

Module 4: Employee Engagement and Retention Strategies

- Employee Retention and Motivation in succession planning.
- Creating a culture of continuous learning and growth.
- Recognition and rewards for high-potential employees.

Day 2: Morning

Module 5: Knowledge Transfer and Transition Management

- Capturing and transferring critical knowledge and expertise.
- Succession planning for specialized and technical roles.
- Managing transitions and minimizing disruption.

Module 6: Building Succession Planning Programs

- Designing and implementing a succession planning program.
- Communicating the importance of succession planning.
- Monitoring and evaluating the effectiveness of the program.

Day 2: Afternoon

Module 7: Legal and Ethical Considerations

- Legal requirements and compliance in succession planning.
- Diversity and Inclusion in succession planning efforts.
- Ethical considerations and fairness in the process.

Module 8: Future Trends and Adaptation

- Emerging trends in succession planning.
- Leveraging technology for effective succession planning.
- Adapting to changing workforce dynamics.

Note: The agenda can be adjusted to accommodate the training program's needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

- **Human Resources Professionals:** HR professionals responsible for talent management, organizational development, and workforce planning will benefit from this course to enhance their skills in succession planning.
- **Senior Leaders and Executives:** C-suite executives, directors, and senior leaders involved in strategic decision-making and organizational planning can gain valuable insights into succession planning to ensure long-term sustainability and leadership continuity.
- **Managers and Supervisors:** Managers and supervisors who play a pivotal role in identifying and developing potential successors within their teams will find this course beneficial in understanding the principles and practices of effective succession planning.
- **Consultants and Advisors:** Consultants, advisors, and coaches specializing in organizational development and talent management can expand their expertise by incorporating succession planning into their service offerings.

Training Outcomes:

By the end of this course, participants will be able to:

- Understand the importance of succession planning in maintaining organizational continuity and sustainability.
- Identify critical roles and positions within their organization that require succession planning.
- Utilize competency frameworks and assessment tools to evaluate talent and identify potential successors.
- Develop individualized development plans and career pathways for high-potential employees.
- Implement coaching and mentoring programs to facilitate leadership development.
- Design employee engagement strategies that promote retention and motivation among potential successors.
- Implement knowledge transfer mechanisms to ensure smooth transitions and minimize disruption during succession.

- Create a comprehensive succession planning program tailored to their organization's needs and goals.
- Navigate legal and ethical considerations in succession planning, including diversity and inclusion.
- Monitor and evaluate the effectiveness of the succession planning program.
- Stay updated with emerging trends in succession planning and leverage technology for enhanced outcomes.
- Apply the concepts, strategies, and best practices learned throughout the course to develop a succession plan for their organization.

Note: The specific outcomes may vary based on the depth and duration of the course, as well as the participants' prior knowledge and experience in succession planning.

Program: Succession Planning: Ensuring Smooth Transitions for Organizational Continuity

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Client:

Name:

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Continuous Improvement - 3-Day Program

The "**Mastering Process Improvement**" course is designed to equip individuals with the knowledge and skills necessary to identify, analyze, and optimize business processes for enhanced efficiency and effectiveness. Through a comprehensive curriculum, participants will learn various process improvement methodologies, tools, and techniques that can be applied across different industries and organizational settings. This course combines theoretical foundations with practical application to empower learners to become organizational process improvement champions.

Training Agenda:

Day 1

Morning:

1. Introduction and Course Overview.

- Welcome participants and provide an overview of the training objectives, agenda, and expected outcomes.
- Set the stage for the importance of process improvement in achieving operational excellence.
- Understanding Process Improvement Fundamentals.
- Define process improvement and its benefits.
- Discuss the principles and methodologies behind process improvement, such as Lean, Six Sigma, and Continuous Improvement.
- Explore the relationship between process improvement and operational excellence.
- Identifying Opportunities for Improvement.
- Learn how to analyze processes and identify areas for improvement.
- Introduce tools and techniques for process mapping, value stream, and root cause analysis.
- Engage participants in a group activity to apply these techniques to real-life scenarios.

Day 1 Afternoon:

2. Lean Principles and Practices

- Explore the core principles of Lean and its application in process improvement.
- Discuss waste reduction, standardization, visual management, and continuous flow.
- Present case studies and examples of successful Lean implementations.
- Six Sigma Methodology.
- Introduce the Six Sigma approach to process improvement.
- Explain the DMAIC (Define, Measure, Analyze, Improve, Control) framework.
- Highlight the importance of data-driven decision-making and statistical analysis in achieving process excellence.
- Process Improvement Tools and Techniques.
- Present various tools and techniques commonly used in process improvement, including process mapping, fishbone diagrams, Pareto charts, and control charts.
- Demonstrate how to apply these tools effectively through hands-on exercises and examples.

Day 2:

Morning Session:

3. Process Optimization and Redesign

- Discuss process optimization and redesign strategies to improve efficiency, quality, and customer satisfaction.
- Introduce concepts such as value-add analysis, process standardization, and error-proofing techniques.
- Engage participants in a group activity to identify opportunities for process optimization.

Afternoon Session:

4. Change Management in Process Improvement

- Address the challenges associated with implementing process improvements.
- Discuss change management principles and techniques to adopt new processes successfully.
- Provide insights on effective communication, stakeholder engagement, and overcoming resistance to change.

Day 3:

Morning & Afternoon:

5. Measurement and Metrics for Process Improvement

- Explore the importance of establishing key performance indicators (KPIs) and metrics to monitor and track process improvement initiatives.
- Discuss how to develop meaningful metrics that align with organizational goals.
- Explain the concept of a balanced scorecard and its application in evaluating process performance.

6. Sustaining Process Improvement Initiatives

- Highlight strategies for sustaining and continuously improving processes over time.
- Discuss the role of leadership, employee engagement, and ongoing monitoring and review.
- Share best practices and success stories of organizations that have achieved long-term process excellence.

7. Action Planning and Next Steps

- Guide participants in developing personalized action plans to apply their learning in their work environments.
- Facilitate a group discussion on potential challenges and strategies for overcoming them.
- Summarize key takeaways and provide additional resources for ongoing support and learning.

Note: The agenda can be adjusted to accommodate the training program's specific needs and time constraints. Breaks and lunchtime should be scheduled accordingly.

Target Audience:

The target audience for "Mastering Process Improvement: Achieving Operational Excellence" can vary depending on the depth and specialization of the course. However, the course benefits professionals and individuals involved in process improvement and operational excellence roles across different industries. Here are some potential target audiences for the course:

Process Improvement Managers: Professionals responsible for overseeing process improvement initiatives within their organizations can benefit from this course. They may lead teams, coordinate improvement projects, and drive operational excellence across various departments.

Operations Managers: Managers responsible for optimizing operational processes and driving efficiency in their departments or organizations can gain valuable insights from this course. They may be involved in streamlining operations, reducing waste, and improving productivity.

Quality Managers: Professionals responsible for ensuring and improving the quality of products or services can enhance their skills in process improvement through this course. They may be focused on implementing quality management systems, analyzing process variations, and driving continuous improvement.

Project Managers: Professionals managing projects related to process improvement, operational excellence, or business transformation can benefit from this course. They may plan, execute, and monitor process improvement initiatives.

It is important to note that the course can also benefit individuals interested in gaining a comprehensive understanding of process improvement and operational excellence, even if they are not currently in specific process improvement roles.

Training Outcomes:

The learning outcomes of the course titled "Mastering Process Improvement: Achieving Operational Excellence" may vary depending on the specific curriculum and objectives of the course. However, here are some general learning outcomes that could be expected from such a course:

Understanding the principles and concepts of process improvement: Participants will gain a comprehensive understanding of the principles, methodologies, and frameworks related to process improvement and operational excellence.

Analyzing and mapping business processes: Participants will learn techniques for analyzing and mapping existing business processes, including identifying inputs, outputs, key steps, and potential areas for improvement.

Identifying and eliminating waste: Participants will develop the ability to identify different types of waste in processes and apply techniques to eliminate or minimize them, such as Lean principles and practices.

Applying data analysis and statistical tools: Participants will learn how to collect and analyze process performance data using statistical tools, identify patterns, trends, and root causes of issues, and make data-driven decisions for process improvement.

Implementing process improvement methodologies: Participants will be introduced to various processes, such as Six Sigma, Lean, and DMAIC, and learn how to apply them effectively to drive operational excellence.

Redesigning and optimizing processes: Participants will acquire knowledge and skills in redesigning processes to improve efficiency, effectiveness, and customer value. They will explore techniques like reengineering, automation, and technology solutions.

Establishing performance metrics and monitoring progress: Participants will understand the importance of establishing relevant performance metrics, setting targets, and benchmarks to assess process effectiveness. They will learn to monitor progress, collect data, and track performance over time.

Leading change and fostering a culture of continuous improvement: Participants will develop leadership skills in managing process improvement initiatives, engaging stakeholders, and overcoming resistance to change. They will also understand the significance of creating a culture of continuous improvement within organizations.

Aligning process improvement with organizational goals: Participants will learn how to link process improvement initiatives with organizational strategy and goals, ensuring that process improvements contribute to overall business success.

Project management for process improvement: Participants will gain knowledge and skills in project management principles and techniques specific to process improvement projects, including planning, execution, stakeholder management, risk management, and evaluation of outcomes.

By the end of the course, participants should have a comprehensive understanding of process improvement methodologies and possess practical skills to drive operational excellence in various organizational contexts. They will be equipped to analyze, optimize, and lead process improvement initiatives, ultimately enhancing organizational performance and customer satisfaction.

Program: Mastering Process Improvement

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Client:

Name:

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