



4D Group

Course Directory 2010

Insurance

Information Technology

Personal Development

Wellness at Work

Effective training by design

Contact Us

For course enquiries and bookings, please contact:

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Dear Clients,

I am delighted to introduce to you 4D Group's updated and expanding Directory and I hope that you find this informative and easy to use.

I would personally like to thank all of our existing clients for their continued support which has been tremendous and to welcome our new clients.

This directory covers our portfolio across [Insurance](#), [Information Technology](#) and [Personal Development](#) and includes our consultancy areas of [Wellness at Work](#), [Life Coaching](#) and [Personal Profiling](#).

What's New

Information Technology: Upgrade training in all Microsoft software products to version 2007 at all levels

Price freeze

I am very pleased that we are able to announce that there is no price increase to 4D Group's rates in 2010.

Please visit our website www.4DGroup.co.uk throughout the year for up to date details of what 4D Group offer.

4D Group has built up major working relationships with several Lloyd's Brokers and Managing Agencies and in some instances becoming the preferred training provider. You will find comments from evaluation feedback received from delegates around the directory.

Along with my team and associates I look forward to working with you to achieve your training and development requirements and business objectives.

Please feel free to contact me on [01483 836183](tel:01483836183) or Dee.Rutherford@4DGroup.co.uk

With kind regards,

Dee Rutherford

Managing Director

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Our Approach

Established in 1993, our professional team of dedicated trainers and consultants enables us to offer complete training flexibility. We are available to those clients who are looking to develop the computer and personal development skills for their staff, as appropriate, in the workplace.

Each of our trainers and associates has a wealth of experience with their up to date knowledge of the software or business area they train and work with. They are well informed and offer impartial advice. Each member of our training team has proven communication and teaching skills at all levels. In order to maintain consistently high standards, trainers are critiqued on a regular basis.

The unrivalled experience of our training team within the London Market forms the backbone of our success.

Over 95% of our client base is within the London Market as we understand that your needs as Brokers, Companies and Managing Agents are different from other city-based institutions and we can therefore satisfy these.

We encourage you to tailor the Insurance, Information Technology and Personal Development courses to match the individuals' requirements and company culture. We see this as an integral component to deliver highly relevant training that is immediately transferable to the workplace.

Insurance Training

All of our Insurance Associates have extensive experience within the market as practitioners. They each understand and appreciate the regulation regime and will work with you to achieve your goals. It is this significance that is invaluable when developing and implementing training solutions.

Information Technology Training

Dee Rutherford and her team of IT trainers have trained delegates from the London Market since 1990. They understand the pressures and requirements that delegates have and insurance based examples are used appropriately within training to ensure the skills become transferable to the workplace.

Personal Development Training

Our team of Personal Development trainers have extensive experience of training within the City including delivering within the London Market. They understand the pressures and requirements that delegates have and insurance based examples are used appropriately within training to ensure the skills become transferable to the workplace.

Wellness at Work

Our wellness at work programmes have increased and are due to expand further. Dr Nerina Ramlakhan is a physiologist and organisational consultant specialising in research and programmes on human alertness and cognitive performance, sleep and memory, productivity and corporate wellness. Dr Ramlakhan offers via 4D Group a series of lectures, workshops and consultancy. We have further trainers that offer manual handling and other topics that are due later this year.

Life Coaching

Our Life Coaching team offer a flexible approach via 4D Group. Life Coaching is designed to empower individuals to make decisions that move them forward from a point of being unclear or lacking confidence about aspects of their lives or careers. The positive impact of these decisions will show up in people's relationships and performance at work, as well as in their personal lives.

Personal Profiling

These are structured tasks or instruments that are used to find out peoples abilities, aptitudes, attainments, personalities or interests. They can also indicate someone's capabilities, preferences or willingness to behave in a particular way. Some are used in clinical settings but here we are interested in how they can be used in a workplace environment. Modern psychometric instruments assess people's specific attributes or qualities. They give valuable information to help make decisions when it comes to recruitment, promotion, succession planning, career development, career counselling and training and development

Training Services

Syndicated Training

4D Group are delighted to offer a 'Syndicated Training' service to our London Market clients free of charge. We appreciate that frequently a client may only have one or two delegates who require training in a particular subject or software package. In these circumstances it is not often cost effective for the client to employ a trainer for one or two people. This is where 4D Group can help.

Should a client find themselves in this situation and would be able to host the event, please contact us. We will then contact all of our other London Market clients and invite them to join the host's course. 4D Group will reduce the host's fee.

What's Included

The fee includes where appropriate, course materials, meetings, courier charges and trainers' travel expenses. VAT will be charged in addition to prices stated in this directory.

Delegate Numbers

Unless otherwise advised and agreed by 4D Group, Insurance and Personal Development training courses held on client site, delegate numbers are limited to twelve. IT training is limited to eight delegates unless otherwise agreed.

Pre-Course Support

Course outlines are supplied as requested when training enquiries are received. Training needs analysis forms can be supplied to enable staff to be grouped to a similar level or with similar training requirements. This also enables the course to be tailored to the client's needs.

During the Course

It is envisaged that the practical case studies and project work to be used will be tailored to reflect the delegates' environment and to reinforce the delegates' knowledge. On any course tailored to a specific requirement, it is expected that the case studies will be taken from the workplace. Our own course materials are provided for reference.

Post Course Evaluation

We are committed to providing effective training that fully meets the objectives outlined in courses that have been tailored through discussion with our clients. To this end, every delegate is issued with an evaluation feedback form at the end of every course. These are used by us to maintain our consistently high standard of service. Copies can be made available for training personnel upon request. The results of the forms are collated by 4D Group into an evaluation summary report and emailed to the course sponsor at no extra cost.

A certificate verifying completion of the course will be issued to any delegate who actively requests one.

Technical Insurance: Coaching by the hour

4D Group offers a unique service to the London Market, being able to deliver highly relevant and timely Technical Insurance coaching by the hour, for a maximum of three individuals.

We appreciate that although an individual may need to understand a concept or topic, there are many factors that impinge on their time, and they would benefit from an hour or two, rather than being out of their work environment for an entire day.

How it works:

1. Individuals are provided with our unique Training Needs Analysis sheets, in advance, which details the topics covered by the following courses:

- Insurance for Non-Insurance People
- Introduction to the London Market
- Introduction to Insurance
- Introduction to Reinsurance
- Facultative Reinsurance
- Proportional Reinsurance
- Non-Proportional Reinsurance
- Lloyd's & London Market Introductory Test (LLMIT)

Additionally:

- Insurance Terms and Concepts
- XCS Process
- Ins-sure Process
- The Claims Process

2. The individual(s) are invited to select topics from the above listed courses and return the completed Training Needs Analysis forms to 4D Group.
3. One of 4D Group's experienced technical trainers will then advise the individual(s) how many hours of coaching is required to cover the chosen topic(s).
4. 4D Group will then contact the individual(s) to arrange a mutually convenient date and time for the coaching to occur.

Timings

This service is available from 08:00 ~ 17:00 (last session). This is in multiples of one hour.

Investment

£130 per hour (minimum of two hours)

Contact

For further information, please contact:

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Accident & Health: Introduction for all

Who would benefit?

This course has been designed for those who require a basic understanding of accident and health insurance. It is suitable for those who work in the front line e.g. underwriting, claims or brokers or those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of accident and health insurance and an outline of what cover is available.

Content

- What is accident and health insurance?
- Personal accident insurance.
- Medical expenses cover.
- Travel insurance.
- The PA and Health Market.
- Direct and reinsurance.
- An outline of cover available.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction

Investment

Client site: £800 per group

Alternative Risk Transfer: Introduction

Who would benefit?

This course is for those with experience in insurance who would benefit from having a practical understanding and knowledge of the various forms of ART available.

Objective

At the end of the course the delegate will have an understanding of the different methodologies of ART, how they operate and how they may be applied to provide risk solutions.

Content

- Reasons for development of ART.
- Types of ART.
- Captive insurance
- Mutual insurance
- Self insurance
- Financial insurance and reinsurance and finite risk
- Reinsurance catastrophe futures
- Capital market solutions:
 - catastrophe bonds
 - contingent surplus notes
 - contingent equity.
- Insurance securitisation
- Weather derivatives

Duration

Half day

Investment

Client site: £800 per group

Aviation Insurance: Introduction for all

Who would benefit?

This course has been designed for anyone who wants a basic understanding of aviation insurance. It is suitable for those who work in the front line e.g. underwriting, claims or brokers or those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an understanding of the types of risks and cover provided by the aviation insurance market.

Content

- Definition of aviation insurance.
- The aviation insurance market: buyers, sellers and intermediaries.
- Insurance types:
 - hull
 - passenger products.
- Liability risks written in the market: airlines and general aviation.
- Legal Principles..
- Main conventions.
- Insurable interest.
- Utmost good faith.
- Indemnity.
- Subrogation and contribution.
- Agreements and protocols and how these affect the aviation insurance market.
- Cover - a description of the cover available in the Market.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction

Investment

Client site: £1350 per group

Delegate comment

"The trainer gave detailed responses to questions: understanding of follow the fortunes, arbitration, event occurrence clause."

Binding Authorities Construction, Operation and Management

Who would benefit?

Staff from underwriting, broking and claims disciplines who are involved with the operation and management of binding authorities. The course provides a detailed analysis of the procedures and practices of delegated underwriting and claims authorities together with the problems that may arise and potential solutions.

Objective

On completion of the course delegates will understand how the basic legal principles of insurance contracts apply to Binding Authorities, the roles of the parties involved, the key clauses in Coverholder Agreements, how the market is regulated in relation to Binding Authorities, how claims are managed and best practice issues.

Content

- Basic contract law.
- What is a binding authority, who are the key players involved and what role are they playing.
- Differences between limited, unlimited and prior submit binders.
- Differences between binding authorities, lineslips and consortia.
- Why are they used in the market and benefits to underwriters and brokers
- Review of the provisions of the main London Market binding authority wordings
- Impact of Contract certainty on delegated authority business
- How does the London Market regulate binding authority business (FSA and Lloyd's)
- How do overseas regulators control binding authority business (US and other as relevant)
- Practical management of the binder.
- FDO signings
- Regular premium closings
- Lloyd's requirements for state and FIL splits
- A & S
- Claims handling
- Under and over authority claims
- How data should be presented
- Loss funds, what they are and how they work
- Binders and ECF

Duration

This can be offered as a full or half day and to an advanced level.

Investment

Client site: £800 per group (half day)
£1,350 per group (full day)

Broking in the London Market

Who would benefit?

This programme considers the broker's role and some of the essential underpinning technical and interpersonal skills required working in the market. The intent is to examine and learn some of the practical broking skills required to achieve this and improve effectiveness when working with the underwriter. This programme will be beneficial to all those who are new to broking, or wish to develop their existing skills.

Objective

To understand how the market works and the role of the major protagonists and to describe the role of the broker and work-flow path. To review the key elements of a successful broking presentation, understand the importance of the doctrine of utmost good faith and to understand the importance of meeting client needs through effective negotiation.

Content

- Market overview
- The role of the broker and underwriter
- The importance of disclosure and the underpinning principles
- Presenting to underwriters
- The factors that influence the quote
- Understanding the 'people' issues
- The human factor (behavioural styles)
- Building long-term relationships
- A value added service

Duration

One day

Investment

Client site: £1350 per group

Broking Skills

Who would benefit?

This programme provides examines the role of the insurance broker and underpins the basic skills required in relation to the day to day work within the insurance market. The programme focuses on the practical broking skills required to achieve this and improve the effectiveness of brokers through developing individual ability to prepare and present an effective case to the underwriter.

Objective

To overview the critical work flow path of the broker; to examine and review the skills of presenting 'Advices' and settlements to underwriters; to develop problem solving techniques for use within a practical setting; to review behavioural styles in relation to conflict handling; to consider the benefits of exhibiting appropriate behavioural styles (assertiveness) and develop broking presentation techniques.

Content

- Preparing a case
- Anticipation of questions
- Presenting a case
- Handling questions and winning
- Human and communication barriers
- Negotiating skills and impact of behaviour, attitudes and non-verbal communication
- Social styles and conflict handling

Duration

One day

Pre-requisites

Some experience of broking is desirable

Investment

Client site: £1350 per group

Business Interruption

Who would benefit?

This course is designed for staff that have little or no knowledge of Business Interruption insurance but are conversant with commercial property insurance. This course quickly strips away the mystic of BI and provides a sound understanding of a subject that can be very daunting to people in the early stages of their technical career.

Objective

To give an overview of the importance of BI cover and an outline of the cover available.

Content

- The importance of BI cover
- The underwriting considerations
- Identify threats to clients business
- Understand scope of a BI policy
- BI terminology:
 - gross profit
 - maximum indemnity period
 - indemnity period
 - increased cost of working
- Undertake claims settlement calculations

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction
Commercial Insurance: Introduction
As BI flows from material damage it is also beneficial to attend:
Commercial Property: Introduction before this course.

Investment

Client site: £1350 per group

Cargo Insurance: Introduction for front line roles

Who would benefit?

This course has been designed for those in underwriting, claims or broking, who require a basic understanding of cargo insurance.

Objective

To give an overview of the types of risks and the cover provided by the cargo insurance market.

Content

- Cargo documentation.
- International trade documents (bills of lading, insurance certificates, invoices)
- Terms of trade.
- Types and characteristics of cargo.
- Products and packing methods.
- Stowage methods.
- Loss or damage susceptibility.
- Cargo risks:
 - extraneous risks (contamination, spontaneous combustion).
- War and strike risks.
- Contingency risks.
- Seller's interest.
- Strikes expenses.
- Loss of profits.
- Institute cargo clauses A, B & C.
- Risks covered:
 - general average and exclusions
 - un-seaworthiness.
- War and strikes exclusions:
 - duration clause and transit clause
 - change of voyage clauses.
- Institute war clauses (cargo).
- Institute strikes clauses (cargo).
- Claims:
 - insurable interest clause
 - forwarding charges clause
 - constructive total loss clauses.
- Increased value clause.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction
Marine: Introduction for Front Line roles, would prove useful for a delegate

Suggested follow-on course

Cargo Insurance: Intermediate

Investment

Client site: £1350 per group

Cargo Insurance: Introduction for support roles

Who would benefit?

This course has been designed for those who require a basic understanding of cargo insurance. It is suitable for those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of the types of risks and the cover provided by the cargo insurance market.

Content

- Types and characteristics of cargo insurance.
- Cargo risks.
- Cargo cover: overview of the cover provided by Institute Cargo clauses A B & C and the incidental clauses (replacement clause etc).

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Introduction: Insurance
Marine Insurance: Introduction for support roles, would prove useful for a delegate

Suggested follow-on course

Cargo Insurance: Introduction for front line roles

Investment

Client site: £800 per group

Delegate comment

"The tutor's presentation, feedback to questions, personality and knowledge on the subject matter was of great benefit."

Cargo Insurance: Intermediate

Who would benefit?

This course is designed for anyone who wants build on the knowledge above that of the introductory course.

Objective

To give an understanding of marine cargo documentation, the types of cargo insurance risks and the cover provided by the marine insurance market.

Content

- How cargo is insured:
 - open covers
 - line slips
 - individual risks.
- Documents used in cargo insurance:
 - invoices
 - bills of lading
 - insurance certificates.
- Types and characteristics of cargo insurance.
- Cargo risks.
- Cargo cover:
 - overview of the cover provided by Institute Cargo Clauses A, B & C.
 - incidental clauses (replacement clause etc).

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Cargo: Introduction for front line roles

Suggested follow-on course

Cargo Insurance: Advanced

Investment

Client site: £800 per group

Cargo Insurance: Advanced

Who would benefit?

The course is designed for anyone who wants to develop their knowledge of cargo insurance beyond that of the intermediate course.

Objective

To give an understanding of marine cargo documentation, the types of cargo insurance risks and the cover provided by the marine insurance market.

Content

- International conventions that affect cargo insurance.
- Cargo trade clauses:
 - overview of the cover provided by the cargo trade clauses.
- Developments in cargo fraud.
- Developments in cargo loss preventions.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Cargo Insurance: Intermediate

Investment

Client site: £800 per group

Casualty Placing / Claims Workshop: Advanced

Who would benefit?

This is designed for those who have some working experience in Casualty and who wish to develop their understanding and skills.

Objective

To give an understanding of slip preparation, the process after submission and practical claims handling issues.

Content

- Introduction and overview
- Classes of business addressed
- **Slip preparation**
 - Contract certainty – can it be done, does it need to be done
 - Application of the code of practice
 - Subjectivities – can these ever be eradicated
- Use of the Lloyds QA tool
- General Underwriters Agreements
- Claims handling provisions
- Market or bespoke wordings – any benefit in processing terms
- Use of the Market wordings central resources
- What actually happens after slip is submitted to XIS – what are they doing apart from always querying everything?
- **Claims handling**
 - Is the slip/policy in line with the intention at the time of placing
 - Claims Scheme – more work or better for the client
 - Key practical claims handling issues in selected major liability forms
 - Electronic claims files – can they work for liability/casualty business?
- **Practical work**
 - Role play the underwriter - review some sample sections of wordings and identify where they could be improved/clarified/tightened
 - Debate in group how and why any recommended changes should be made

Duration

One day

Pre-requisites

Working experience in claims is desirable

Investment

Client site: £1,350 per group

Catastrophic Claims (Dealing with)

Who would benefit?

The course enables delegates to discuss and increase their understanding of best practice in responding to catastrophe claims. The course will draw on lessons learned from catastrophes such as hurricanes, tsunamis, bushfires, terrorist attacks and earthquakes together with some disasters closer to home. The course is for those either with responsibility for planning to handle a major catastrophe as well as those keen to extend their general knowledge of the area.

Objective

The delegates will have a better knowledge of the logistical, technical and practical issues that arise in the aftermath of a catastrophe.

Content

- What is a catastrophe
- What makes dealing with it so complicated?
- How should underwriters get a better understanding of where their exposures are?
- Cat modelling and RDS work
- Information captured for claims
- Expert management – keep your loss adjuster sane.
- Cash flow – management of escrows and loss funds
- How to interface with reinsurers and work collaboratively.
- Reviews and inspections
- What can UN/Red Cross experience tell us
- Practical experiences and discussion from delegates
- Flip side - What if your office was hit by a hurricane?
- How would you ensure that business as usual went on?
- Overview of disaster planning strategies

Duration

Half day

Pre-requisites

Some basic knowledge of insurance either marine or non marine. Does not require specific claims or underwriting knowledge

Investment

Client site: £800 per group

CII Study Support

4D Group can offer to students of the Chartered Insurance Institute study support across Certificate, Diploma and Advanced Diploma examinations via four options.

All four options are available in the following subjects:

Advanced Diploma Level

- 510 Risk & Insurance (non-stats)
- 510 Risk & Insurance (stats)
- 530 Business & Economics
- 655 Risk Management
- 745 Property insurance
- 750 Commercial property
- 755 Liability insurance
- 760 Personal lines
- 785 Reinsurance
- 825 Application of Reinsurance
- 930 Insurance broking
- 845 Marketing
- 955 London Market U/W

Diploma Level

- P01 Insurance Practice
- P04 Business Practice
- P05 Insurance Law
- P10 Commercial Insurance
- P11 Personal Insurance
- P13 Marine and Aviation
- P17 Management
- P18 Property Claims
- P21 Contract Wording

Certificate Level

- FIT Foundation Insurance Test
- IF1 Legal and Regulatory
- IF2 General Insurance Business
- IF3 Underwriting Process
- IF4 Claims Handling Process
- IF5 Motor Products
- IF6 Household Products

OPTION ONE

One day revision courses held to assist individuals with revision study & examination preparation.

Content

Clarify syllabus concerns.
Learn what the examiner looks for.
Avoid common mistakes
Useful revision & exam techniques

Duration

One day (except 510 - half day)

When

One month before examination

Pre-requisites

It is assumed individuals attending a course will have read the course book in its' entirety.

Investment

One day £1,350 per group
Half day £800 per group

OPTION TWO

CII Tutorial Revision sessions of two hours to assist revision study and examination preparation. Students are invited to attend tutorial sessions with the trainer to cover specific issues that concern them on an individual basis.

Content

Primarily dictated by the student but areas available may include:
Clarify syllabus concerns
Learn what the examiner looks for
Avoid common mistakes
Useful revision & exam techniques

Duration

Sessions of two hours (minimum of two, two hour sessions & maximum of three two hour sessions in one training day)

When

Suggest one month before exam

Pre-requisites

It is assumed individuals attending a tutorial session will have read the course book in its' entirety.

Investment

One day
Three x 2 hour sessions £1,350
Two x 2 hour sessions £900

OPTION THREE

A clinic is held on a regular basis (once a week / fortnight / month) & students are invited to make hour long appointments with the trainer.

Content

Primarily dictated by the student but areas available may include:
One-to-one coaching / mentoring
Personal study areas / issues
Help with Continuous Assessment assignments.
Past papers - question & answer styles
Clarify syllabus concerns.
Learn what the examiner looks for.
Avoid common mistakes
Useful revision & exam techniques

Duration

Minimum of three, maximum of six, one hour sessions in one training day.

When

No preferred start date. Suggest when students begin studying.

Investment

One day
Six x 1 hour sessions £1,350
Half day
Three x 1 hour sessions £800

OPTION FOUR

Clinic-style appointments with a trainer where the student(s) specify what is covered.

A clinic is held on a regular basis (once a week / fortnight / month) & students are invited to make 30 minute appointments with the trainer.

Content

Primarily dictated by the student but areas available may include:

The CII credits system
 Help with CII documentation
 Guidance in choosing subjects
 Gaining Exemptions
 CII Membership – what it entails
 Continuous Assessment vs. Book Only
 Set study timetable and stick to it!
 Deadline dates
 Mentoring and exam support
 How many exams to take at one sitting

Duration

Available by the hour (minimum of two hours, maximum of six hours in one training day).

When

No preferred start date. Suggest when students begin studying.

Investment

Hourly rate £130

Course Objectives

The objective of all four options is to assist students in their CII examinations from entry stage, through to studying, revision & finally taking the examination.

To ensure that students prepare well, study for the optimum time, receive continued support & be successful in passing their CII examinations.

Delegate Numbers

The optimum number of delegates for Option One is considered to be a maximum of twelve as this will enable each delegate to participate fully and gain most from the courses.

Options Two, Three and Four we suggest a maximum of two delegates per one/two hour session.

Post Course Support

As part of the package 4D Group are happy to offer unlimited post course support to delegates that have attended any of our CII courses by either telephone or email

Claims Handling

Who would benefit?

This programme introduces practical claims handling. The intention is to provide a broad based overview.

This programme is suited to those who are new to insurance or claims work.

Objective

At the end of the course, delegates will gain knowledge and understanding of the claims process including how claims are notified, the assessment of a claim, the operation of underpinning insurance principles and how settlement is achieved.

Content

- What constitutes a valid claim
- What are the duties of the insurer
- What are the duties of the claimant
- Basic cover and exclusions
- The operation of proximate cause
- Insured, uninsured & excluded perils
- Terms, conditions and warranties
- The Claims Department
- Help lines
- The operation of the insurance policy
- Property claims v Liability claims
- Claims Investigations
- Avoiding fraud
- Settlement: A true indemnity?
- Factors effecting indemnity
- Subrogation & Contribution

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Introduction: Insurance

Investment

Client site: £1350 per group

Claims Handling Introduction

Who would benefit?

As a highly interactive workshop, this course is suitable for those who are new to the claims environment as claims technicians or claims brokers and those who would benefit from an overview of the claims process. The course would also be useful for those interested in a refresher course. The principles of insurance and their relevance to claims will be referred to throughout the course.

Objective

This course gives attendees an understanding of the claims process, an insight into liability claims, litigation process, motor and property claims. It will also give an understanding of contract law and insurance documentation.

Content

- Customer expectations and customer service
- The life-cycle of a claim
- The importance of reserving
- Positive questioning techniques to get the information you need
- Contract Law and the Insurance Contract
- Policy documentation
- Disputes
- Industry codes
- Claims
 - Liability
 - Business interruption
 - Property
 - Motor
- The litigation process

Duration

One day

Investment

Client site: £1350 per group

Delegate comment

"The best thing about the course was the excellent knowledge of the trainer."

Commercial Insurance Introduction

Who would benefit?

The course is designed for people who are new to a commercial insurance department. This course has proved particularly useful to people who have experience of personal lines and are now progressing to commercial insurance.

Objective

To understand commercial lines and an outline of the cover available.

Content

Typical commercial client's insurance needs and the main classes of:

- property
- pecuniary
- liability
- Underwriting considerations
- Main covers and restrictions of combined policies
- Examine claims scenarios and appreciate the implications for the client (by revisiting legal principles)

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction

Suggested follow-on courses

Commercial Property: Introduction
Business Interruption: Introduction

Investment

Client site: £1350 per group

Commercial Property Introduction

Who would benefit?

The course is designed for people who have less than 12 months in a commercial insurance department

Objective

To understand commercial property and an outline of the cover available

Content

- Typical covers:
 - fire and special perils
 - theft
 - money
 - 'all risks'
- Underwriting considerations and risk presentations
- Examine key policy wordings focusing on exclusions with use of claims scenarios
- Adjustable premiums

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction

Suggested follow-on course

Business Interruption: Introduction

Investment

Client site: £1350 per group

Contingency Insurance: Introduction

Who would benefit?

Any involved in the placing or claims area of this class of business, either in a front line or a supporting role

Objective

To get a clear understanding of the varied types of coverage available within this class and to appreciate who the purchasers are

Content

- Introduction to the general class
- Who are the purchasers of this type of insurance and why
- Closer look at the various types of insurance
 - Event cancellation
 - Non appearance
 - Prize indemnity
 - Over-redemption
 - Death and Disgrace
 - Film insurance
 - Product recall/Malicious Product
 - Tamper
 - Weather insurance

Duration

Half day

Pre-requisites

Basic knowledge of insurance concepts

Investment

Client site: £800 per group

Contract Certainty

Who would benefit?

This course is for any involved in commercial lines insurance.

Objective

To provide a comprehensive overview of the background, purpose and practical application of contract certainty.

Content

- Basic Law
 - Types of law
 - Legal system
 - Sources of law
 - Legislation
 - Courts and court system
 - Individuals/Corporate – differences in legal standing
- Tort & Contract Law introduction
- Law of Agency
- Market reform
 - Regulatory background
 - Market initiatives
- Insurance Contract Law
 - Formation
 - Breach
 - Conditions, Warranties and other contractual terms
 - Void, voidable, unenforceable contracts
 - Utmost good faith
- Practical issues
 - What can get in the way of contract certainty
 - Why does it matter

Duration

One day

Pre-requisites

Basic understanding of insurance and the London Market

Investment

Client site: £1,350 per group

Contract Law Introduction

Who would benefit?

This programme introduces the basic principles of law relating to contract. It examines how a contract is made and why, sometimes, problems can arise and how they may be resolved.

Objective

At the end of the course, delegates will gain knowledge and a broad understanding of the law relating to contracts and their value in insurance: The nature and scope of contracts The difference between an agreement and a contract What happens when it all goes wrong – legal remedies Insurance contracts

Content

- The scope of English law
- Definition and classification of contracts
- Elements of a legally binding contract
- Offer and acceptance
- Capacity
- Insurance contracts
- Basic principles
- Intention to create legally binding agreement
- Consensus ad idem
- Elements of consideration
- Breaches of contract
- Legal remedies
- The proposal form as a legal document

Duration

One day

Investment

Client site: £1350 per group

Data Protection

Who would benefit?

This course is for anyone requiring knowledge, or seeking to refresh knowledge, in relation to data protection and the Data Protection Act.

Objective

The purpose of this programme is to provide an overview and basic understanding of the legal obligations and general responsibilities arising from the capture of personal information.

Content

- Introducing the Act (1984 & 1998)
- Freedom of Information Act (2000)
- Responsibilities of the Act
- Responsibilities of the company and of the individual
- Key Terms and Definitions
 - Personal data
 - Sensitive personal data
 - Data subject
 - Data controller
 - Data processor
 - Processing
 - Subject access
 - Recipient
 - The third party to whom the data is disclosed.
 - Computers and other retrieval systems
 - Manual records (relevant filing system)
- The Principles of Data Protection
 - Lawful acquisition and processing of information
 - Purpose of collection of data
 - Adequacy and relevance of data
 - Up to date information
 - 'Shelf-life' how long can data be kept?
 - Considering individual's rights
 - Security of information – to prevent loss or unauthorised disclosure
- Geographical constraints on the use of data
- Fair and Lawful Processing
- Personal data
 - Personal Sensitive data
 - 'Opt out'
 - Conditions for Sensitive Personal data
- The Rights of the Individual
- Eight key principles of data protection

Duration

Half day

Investment

Client site: £800 per group

Energy Insurance: Introduction for front line roles

Who would benefit?

This course has been designed for those in underwriting, claims or broking, who require a basic understanding of energy insurance.

Objective

To give an overview of the types of risks and the cover provided by the energy insurance market.

Content

- Types of energy risks.
- The types of risks found in the energy market:
 - rigs
 - platforms
 - pipelines
 - liability.
- Legal aspects:
 - how the legal aspects of marine insurance apply to energy.
- Energy Market:
 - who is involved in energy insurance?
- Brief analysis of cover provided for:
 - drilling rigs (LSDBF)
 - platforms including the London Standard Platform Form.
- Owners' extra expenses.
- Construction risks.
- Business Interruption/Loss of Production Income

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Introduction: Insurance

Marine Insurance: Introduction for front line roles, would prove useful for a delegate

Investment

Client site: £1350 per group

Energy Insurance: Introduction for support roles

Who would benefit?

This course has been designed for those who require a basic understanding of energy insurance. It is suitable for those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of the risks written in energy insurance and the cover given.

Content

- What is energy insurance?
- The types of energy risks.
- Liability aspects.
- Energy market:
 - worldwide
 - onshore
 - offshore.
- Nuclear and power risks.
- Types of insurance available and an outline of what is covered.
- Loss information.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Introduction: Insurance

Marine Insurance: Introduction for support roles, would prove useful for a delegate

Investment

Client site: £800 per group

English Law: Introduction

Who would benefit?

This programme introduces the basic principles of English legal system. It examines sources of law and then provides a foundation for some of the key areas of concern for those working within the insurance profession.

Objective

To gain a broad understanding of English law including its nature and scope. The major areas of interest to insurance professionals: agency, contract and tort and the key legal principles underpinning insurance

Content

- The scope of English law
- Sources of English law
- The English legal system
- The Law of Agency
- Insurance: Basic legal principles
- Legal personality
- The law of tort
- The Law of Contract

Duration

One day

Investment

Client site: £1,350 per group

Delegate comment

"The trainer delivered the course material in an interesting and informative manner and to a consistently high standard."

Facultative Reinsurance

Who would benefit?

This course has been designed for those who require a basic understanding of facultative reinsurance.

Objective

To give an understanding of why insurers buy facultative reinsurance and how facultative reinsurance, both proportional and non-proportional operate.

Content

- The use of facultative reinsurance.
- How facultative reinsurance fits in with an insurer's complete reinsurance programme.
- How facultative reinsurance is used.
- The facultative reinsurance slip and the main clauses used.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Reinsurance: Introduction

Suggested follow-on courses

Proportional Reinsurance
Non-Proportional Reinsurance

Investment

Client site: £800 per group

Household Insurance

Who would benefit?

This course gives a broad introduction to household insurances and is ideally suited to those who are new to the London Market, or who need to gain an overview of the major players and its operation.

Objective

Review the scope of Household buildings and contents cover
Relate to a number of extensions, including All Risks
Appreciate the importance of cover for legal liability
Explain the cover provided under Household as an occupier/owner
Appreciate the value of legal expenses
Understand civil liability including Torts
Be confident in the use of appropriate legal terminology

Content

- The Scope of Household Buildings & Contents
- Limitations of Buildings and Contents cover
- Torts – Negligence, nuisance, Trespass and Strict Liability
- Claims – the effect of fraud and the use of technology to combat fraud
- Household extensions
- Legal liability cover provided under Household
- Occupiers liability & Defective premises

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Introduction: Insurance

Investment

Client site: £1350 per group

Hull Insurance: Introduction for front line roles

Who would benefit?

This course has been designed for those in underwriting, claims or broking, who require a basic understanding of hull insurance.

Objective

To give an overview of the types of risks and the cover provided by the hull insurance market.

Content

- Ship classification.
- Vessel types and classes:
 - passenger liner
 - general cargo
 - bulkers.
- Types of hull risks.
- Building: construction and repair.
- Trading: time and voyage.
- Port risks.
- Protection and indemnity risks.
- Hull trading warranties.
- Geographical warranties.
- Cargo considerations.
- Institute time clauses, hulls.
- A brief consideration of the Institute time clauses.
- Cover, duration, collision liabilities and exclusions.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Introduction: Insurance
Marine Insurance: Introduction for front line roles, would prove useful for a delegate

Suggested follow-on course

Hull Insurance: Intermediate

Investment

Client site: £1350 per group

Hull Insurance: Introduction for support roles

Who would benefit?

This course has been designed for those who require a basic understanding of hull insurance. It is suitable for those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an understanding of the risks and cover found in marine hull insurance.

Content

- Types of hull insurance.
- Characteristics of hull insurance.
- Hull risks.
- Hull cover: overview of the cover provided by Institute Time Clauses 1.11.03.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Insurance: Introduction

Marine Insurance: Introduction for support roles, would prove useful for a delegate

Suggested follow-on course

Hull Insurance: Introduction for front line roles

Investment

Client site: £800 per group

Hull Insurance: Intermediate

Who would benefit?

This course is designed for anyone who wants to further their marine hull insurance knowledge above that of the introductory course.

Objective

To give a deeper understanding of the risks and cover found in marine hull insurance.

Content

- Types and characteristics of hull insurance.
- Hull risks.
- Hull cover: overview of the cover provided by Institute Time Clauses 1.11.03.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Hull: Introduction for front line roles

Suggested follow-on course

Hull Insurance: Advanced

Investment

Client site: £800 per group

Hull Insurance: Advanced

Who would benefit?

The course is designed for anyone who wants to develop their knowledge of hull insurance beyond that of the intermediate course.

Objective

To give an understanding of marine hull insurance risks and the cover provided by the marine insurance market.

Content

- Legal Principles:
 - law on latent defects
 - collision liability
 - limitation of Liability
 - ship-owners' liability.
- Hull clauses:
 - international hull clauses 1.11.03
 - port risks clauses
 - building risk clauses
 - war risks.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Hull Insurance: Intermediate

Investment

Client site: £1350 per group

Delegate comment

"The trainer's knowledge of the London Market was exceptional therefore it was a great course."

Insurance for Non-Insurance People

Who would benefit?

This course is designed for anyone who requires an awareness of the insurance business, the runners and riders. The course is highly participative and informal. It is aimed at those who work on reception, switchboard, security, administration, HR, IT, finance and post-room amongst others.

Objective

To give an overview of how insurance works and who is involved.

Content

- What is insurance?
- The roles of brokers and underwriters.
- Conducting insurance.
- The difference between a Lloyd's syndicate and a company.
- Lloyd's - explanations of:
 - name/member
 - corporate capital
 - member's agents
 - managing agent.
- History of and tour of Lloyd's.

Duration

Half Day

Pre-requisites

None

Suggested follow-on courses

Insurance: Introduction
Introduction to the London Market

Investment

Client site: £800 per group

Introduction to Insurance

Who would benefit?

This course is designed for anyone who wants a basic knowledge of insurance. The course is suitable for those who work in the front line and support staff. This course will also assist students of the Lloyd's and London Market Introductory Test or the CII's Insurance Foundation Certificate

Objective

To give an overview of how insurance works and an outline of what cover is available.

Content

- Risk and insurance.
 - The meaning of risk
 - What can be insured
 - Calculating premiums
 - Insurance cycle and financial performance
- Main classes of insurance
 - Property
 - Pecuniary
 - Liability
 - Transportation
- Risk management
 - Captive insurers.
- Coinsurance
- Reinsurance
 - Facultative and Treaty
 - Proportional & Non Proportional
- Legal principles
 - Utmost good faith
 - Insurable interest
 - Indemnity
 - Subrogation
 - Contribution
 - Proximate cause
- Conditions and Warranties
- Claims
- Regulation and the FSA

Duration

One day

Pre-requisites

None

Suggested follow-on course

Reinsurance: Introduction

Investment

Client site: £1350 per group

Introduction to the London Market

Who would benefit?

The course will be of value to anyone who has just joined the insurance industry or the London market and who wishes to broaden his/her knowledge of how the market operates. It will also be very useful to anyone from outside the London market, but who has business involvement in London. This course would also assist students of the Lloyd's and London Market Introductory Test.

Objective

The course will provide an insight into the London insurance market, including an explanation of its evolution, the cycles, the role of the participants, and an update on the evolving market processes and procedures. The course will give a detailed overview of the history of Lloyd's and the make-up of the Lloyd's market, the unique operating systems of the Lloyd's and company Markets, market problems, the role of the broker and role of Equitas.

Content

Evolution of the London Market

- Brief history and its impact on the present.
- The changing numbers of "players" (insurers, reinsurers and brokers).

The Market Place

- Lloyd's, Companies, Underwriting Agencies, P&I Clubs.
- The bureau (Xchanging).
- Equitas.

Underwriters

- Their role and responsibilities.

Brokers

- Their role and responsibilities
- Who to use to place the risk.
- Security – the issues.

The Insurance Cycle

- What is it
- What is its impact

The Placing Process

- Contract documentation.
- The impact of Market Reform.

Duration

Half day

Pre-requisites

None

Suggested follow-on course

Insurance: Introduction

Investment

Client site: £800 per group

Introduction to Underwriting

Who would benefit?

The course is for anyone who needs to understand the role of the underwriter. The course will adopt a generic approach considering elements of non-marine property and non-marine casualty business, the skills that are required together with an understanding of the principles of pricing and how business is placed in the London market. Underwriting controls, reinsurance and reserving strategies as well as managing exposure are outlined.

Objective

To introduce and review some of the important principles and practices involved in underwriting business within the London market.

Content

- An introduction to the role, duty and authority of the underwriter

Underwriting - Risk Business

- Nature of risk and risk selection
- Defining risk
- Classify insurable/uninsurable risk
- Underwriting techniques to modify the risk (physical v moral hazard)

Pricing – Factors that impinge upon premium rates

- Determine premium & rating levels
- Importance of claims ratios
- Modify premium (limits, excesses, deductibles, franchises)

Basic Insurance Principles

- Insurable interest
- Utmost good faith
- Indemnity, subrogation and contribution
- Proximate cause

Underpinning legal issues and principles

- The contract of Insurance
- The policy structure (overview)
- Conditions & warranties

Underwriting techniques

- How risks are placed
- The market cycle

The Big Picture

- Underwriting controls
- Overall risk exposure
- Reinsurance and reserving strategies
- Managing exposures
- Relationship and portfolio management

Duration

One day

Investment

Client site: £1350 per group

Law of Tort Introduction

Who would benefit?

This programme introduces the law of tort and is a useful foundation for anybody embarking on CII studies, or wishes to gain an understanding of this part of English civil law.

Objective

At the end of the course, delegates will gain knowledge and understanding of the law of tort:

The scope of tort

The nature and classification of tort

The major torts

How claims arise and the role of insurance

Content

- Where tort fits within English law
- The scope and nature of tort
- The classification of major torts
- The major torts (an insurance perspective)
- Basic cover and exclusions
- The operation of proximate cause
- Insured, uninsured & excluded perils
- Terms, conditions and warranties
- Negligence
- Nuisance
- Defamation of character
- The principles governing the main torts
- Bringing an action in tort
- Statutory duties
- Employer's liability
- Strict liability
- Occupiers Liability
- Contractual liability
- Products Liability
- Professional Indemnity

Duration

One day

Investment

Client site: £1350 per group

Liability Insurance: Introduction for front line roles

Who would benefit?

This course has been designed for those in underwriting, claims or broking, who require a basic understanding of liability insurance.

Objective

To give an overview of the risks written in liability insurance and the cover given.

Content

- General principles of liability insurance overview.
- Third party liability: property bodily injury.
- Strict liability: statutory negligence.
- Contractual liability.
- Why buy liability insurance, compulsory cover.
- Types of insurance: marine non-marine (casualty) construction energy (onshore and offshore).
- Legal aspects: importance of jurisdiction and location of risk . USA problems.
- Outline of cover available.
- Property damage.
- BI/Death.
- Contractual.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by: Insurance: Introduction

Investment

Client site: £800 per group

Liability Insurance: Introduction for support roles

Who would benefit?

This course has been designed for those who require a basic understanding of liability insurance. It is suitable for those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of the risks written in liability insurance and the cover given.

Content

- What is liability insurance?
- The types of risks found in liability.
- Legal aspects.
- The liability market.
- The types of insurance available and an outline of what is covered.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:

Insurance: Introduction

Suggested follow-on courses

Liability Insurance: Introduction for front line roles

Investment

Client site: £800 per group

Liability/Casualty Workshop

Who would benefit?

This workshop is aimed at delegates who have been handling commercial insurance for 2/3 years. It will build on existing knowledge of liability insurance by studying the particular issues surrounding this class of business. Through the use of case studies this workshop will prove equally beneficial for account handlers and also claims staff.

Objective

The main sources of liability and discuss current market issues will be revised. A look at some of the reasons why handling this class of business is different to other major classes of business, such as property. Policy wordings and definitions are examined and alternative covers available to the client explained, with particular discussion regarding the advantages and disadvantages of 'claims made' and 'losses occurring' covers.

The Workshop includes discussion on how to select Limits of Indemnity and some of the more common extensions available.

A look at how the policy works when a claim arises, including two case studies where the various headings of damages will be calculated.

Throughout the Workshop, discussion on how the information obtained from the client is used by the Underwriter to assess the risk and then show how this can affect the level of rating to be applied. Although the workshop concentrates on Employers / Public / Products, other liability covers, including PI, D&O and Product Guarantee will be discussed.

Content

- Understand the need for liability insurance, the main sources of liability, the main provisions of cover and the main hazards encountered
- Review typical policy covers, conditions and restrictions
 - Scope of Cover
 - Period of Insurance Territorial Limits
 - Limit of Indemnity
- Outline the basic elements of underwriting considerations and basis of liability rating
 - IBNR
 - Triangulation

- Special liability protection covers
 - Retrospective cover
 - Professional Indemnity
 - Directors' and Officers'
 - Legal cost and expenses
 - Environmental Liability
 - Product Guarantee (including product recall)
 - Financial Loss
- Principles governing the award of damages
 - Liquidated and Un-liquidated
 - Special & General
- An appreciation of Risk Management and loss prevention

Duration

One day

Pre-requisites

Handling commercial insurance for 2/3 years is desirable

Investment

Client site: £1,350 per group

Liability Placing and Claims Workshop

Who would benefit?

This very practical programme about placing practice and aimed at those who have some working experience in Casualty and who wish to develop their understanding and skills.

Objective

To give an understanding of slip preparation, the process after submission and practical claims handling issues.

Content

- Introduction and overview
- Classes of business addressed
- Slip preparation
 - Market reform slip
 - Contract certainty
 - Code of practice application
 - Subjectives
- Use of Lloyds QA tool
- GUA
- Claims handling provisions
- Market or bespoke wordings
- Market wordings central resources
- What happens after slip submitted
- Claims handling
 - Is slip/policy in line with the intention at the time of placing
 - Claims Scheme
 - Key claims handling issues
 - Electronic claims files
- Practical work
 - Review sample sections of wordings, identify where they could be clarified / tightened.
 - Debate how/why recommended changes should be made

Duration

One day

Pre-requisites

Working experience in claims is desirable

Investment

Client site: £1,350 per group

Lloyd's and London Market Introductory Test (LLMIT) Revision

Who would benefit?

This course is suitable to all those intending taking the Lloyd's and London Market Introductory Test (LLMIT) as the course provides a detailed revision of the syllabus.

Delegates will be expected to have studied the course book prior to attending the training.

Objective

To assist delegates with their revision study and examination preparation providing a knowledge and understanding of basic principles and practice, the various organisations that make up the market and how the profession conducts business within the London Market.

Content

- Examine exam mistakes and how to avoid them
- Basic insurance and legal principles
- Main classes of business transacted
- Use of reinsurance
- Regulatory requirements applicable to the London Market
- The structure of the London Market
- The Governance of Lloyd's
- Knowledge and understanding of underwriting
- Knowledge and understanding of broking
- How business is transacted
- Knowledge and understanding of accounts and claims services functions and process operating at market level.
- Learn useful revision techniques.

Duration

One and two day courses are available.

Investment

For courses held at your site, with a maximum of 14 delegates: £1,350 per day.

Dates for Open Courses

1 February (one day - £230 pp)
2&3 February (two days - £325 pp)

1 June (one day - £230 pp)
2&3 June (two days - £325 pp)

1 September (one day - £230 pp)
2&3 September (two days - £325 pp)

1 November (one day - £230 pp)
2&3 November (two days - £325 pp)

Marine Hull Claims Intermediate

Who would benefit?

This course is for anyone who has been handling hull claims for some time and who wants to extend their knowledge.

Objective

To extend practical knowledge and ability to handle hull claims of any type including yachts.

Content

- What is the law surrounding hull claims, UK and international
 - Collision regulations
 - Safety of Life at Sea regulations
 - International Safety Management code
 - Limitation of Liability
 - Marine Insurance Act 1906
- Standard Hull policy
 - General coverage
 - Additional coverages available
 - Review of main international clauses
- Collisions
 - Cross liability and single liability
 - methods of apportionment of damage
- General Average
- Expert Management – how to maximise their impact
- Yacht claims – small to super
- Claims practical tasks
 - Various scenarios
- Discussion on good claims practice
- Risk management

Duration

Half day

Pre-requisites

Some experience in handling marine claims, preferably hull

Investment

Client site: £800 per group

Marine Hull Insurance Introduction

Who would benefit?

This course will appeal to all brokers, underwriters (Lloyd's and Companies), underwriting agencies, technicians, broker support, claims staff, P and I clubs, ship managers, marine lawyers, surveyors, and property and casualty staff who need to gain an understanding of transport /marine insurances.

Objective

This course will serve to explain the fundamentals of insurances placed on Marine Hulls (ships). The course is designed as an introduction only to this large and otherwise complex subject.

On completion, the delegate will be aware of the range of vessels involved, understand underwriting fundamentals and be aware of risk management techniques. They will gain a good understanding of marine insurance as applied to hulls, identify various risk profiles, begin to understand what information an underwriter is searching for and have a much fuller appreciation of what is involved in Hull insurance.

Content

- An introduction to main aspects of Hull insurance
- Broad knowledge of the London market
- Theory and practical aspects of Hull insurance, underwriting and risk management.

Duration

One day

Pre-requisites

None

Investment

Client site: £1,350 per group

Marine Insurance: Introduction for front line roles

Who would benefit?

This course has been designed for those in underwriting, claims or broking, who require a basic understanding of marine insurance.

Objective

To give an overview of the types of risks and the cover provided by the marine insurance market.

Content

- Definition of marine insurance.
- Marine insurance market: buyers, sellers and intermediaries.
- The types of hull, cargo and liability risks written in the market.
- Main legal principles of marine insurance (Marine Insurance Act 1906).
- Indemnity and subrogation.
- Insurable interest.
- Utmost good faith.
- Warranties.
- Valued and unvalued policies.
- Proximate clause.
- The types of losses:
 - total loss
 - constructive total loss
 - partial loss.
- Brief description of general average.
- Description of the cover available in the market for:
 - hull
 - cargo
 - P&I risks.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by: Insurance: Introduction

Suggested follow-on courses

Introduction for front line roles in:

- Cargo
- Energy
- Hull
- Liability
- Special Risks: Introduction for all

Investment

Client site: £1350 per group

Marine Insurance: Introduction for support roles

Who would benefit?

This course has been designed for those who require a basic understanding of marine insurance. It is suitable for those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an understanding of the types of risks and cover provided by the marine insurance market, why marine insurance is purchased, the marine insurance market and the legal principles of marine insurance.

Content

- What is marine insurance?
- Marine insurance market: buyers, sellers and intermediaries.
- Legal principles of marine Insurance.
- Marine Insurance Act 1906.
- Insurable interest.
- Wagering contracts.
- Utmost good faith.
- Warranties.
- Valued and unvalued policies.
- Indemnity and subrogation.
- Proximate cause.
- The types of losses:
 - total loss
 - constructive total loss
 - partial loss.
- General average, sue and labour.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by: Insurance: Introduction

Suggested follow-on courses

Introduction for support roles in:

- Cargo
- Energy
- Hull
- Liability
- Special Risks: Introduction for all

Investment

Client site: £800 per group

Marine Law

Who would benefit?

Those starting out as marine claims adjusters or brokers, or personnel on the placing or underwriting side at any level who want an overview of the underlying legal framework to the business.

Objective

To provide an introduction to marine law.

Content

- Sources of law
- National v international
- Conventions
 - How are they created
 - How are they enforced
- Liens
- Limitation of liability
- Arrest
- Salvage
- Collisions
- Passengers
- Towage
- General Average
- Wreck removal
- Pollution
- Contracts of carriage
 - Charter parties
 - Bills of lading
 - Other documents
 - Hague-Visby and Hamburg rules
- Multimodal transport

Duration

One day

Pre-requisites

None, although some exposure to marine insurance would help

Investment

Client site: £1,350 per group

Market Reform Contract

Who would benefit?

The course is designed for anyone who needs knowledge of the Market Reform Contract provisions and the implications for managing agents. Would also be suitable for any support staff who work in provide background support (IT, Accounts etc).

Objective

To give an understanding of the Market Reform Contract and the implications of the Market Reform provisions.

Content

- Why Market Reform was introduced
- The drivers behind Market Reform
- The composition and role of the Market Reform Group
- Why it is mandatory
- The Market Contract
- Slip drafting
- What should be on the slip?
- What the headings mean
- MR Contract structure
- Relationship between Audit and the Contract Certainty Checklist
- Current and future developments
- Tools and Checklists

Duration

Half day

Pre-requisites

None

Investment

Client site: £800 per group

Motor Insurance

Introduction

Who would benefit?

The course is designed for people who are new to the personal lines department of a broker

Objective

To provide knowledge and understanding of the practices and procedures connected with private motor insurance, with reference to applicable legal and regulatory considerations.

Content

Module One: The Marketplace

- Insurers and Intermediaries.
- The MIB, MIIC, MID and DVLA.

Module Two: Scope of cover provided

- Core cover provided:
 - accidental damage
 - third party
 - fire and theft
 - legal expenses.
- Additional non-insurance benefits available

Module Three: Legal and Regulatory considerations

- Road Traffic Act 1988 as amended by Road Traffic Act 1991
- EU Directives
- Rehabilitation of Offender Act 1974
- Disability Discrimination Act 1995
- The Insurance Conduct of Business Rules

Module Four: Risk Assessment, rating and underwriting

- Proposal forms
- Rating and underwriting individual risks
- Cover notes and Certificates
- Policies, with specific reference to conditions, exclusions and exceptions.
- No Claims Discounts
- Renewal

Module Five: Claims procedures

- Claims handling
- Motor engineers, recommended repairers
- MIAFTR2 and CUE
- Fraud
- Financial Ombudsman Service

Duration

One day

Investment

Client site: £1,350 per group

Non-Marine Reinsurance Wordings

Who would benefit?

Designed for anyone who needs an understanding of reinsurance wordings

Objective

To give an understanding of how Proportional and Non-Proportional wordings are created. The common clauses needed and their meanings

Content

- The Slip – What to look for and legal position
- Quota Share Wordings
- Surplus Wordings
- Catastrophe Wordings
- Liability Wordings
- A detailed description of these wordings and the clauses that can be used.
- Case Studies to illustrate the meanings of different clauses will be used.

Duration

Custom made according to client needs but usually three days.

Investment

Client site: £poa

Non-Proportional Reinsurance

Who would benefit?

This course has been designed for those who require a basic understanding of non-proportional reinsurance.

Objective

To give an understanding of why insurers buy non-proportional reinsurance and how these contracts operate. To explain how these contracts are arranged and the main clauses used.

Content

- The use of non-proportional contracts.
- How non-proportional contracts fit in with an insurer's complete reinsurance programme.
- A detailed description of non-proportional contracts in relation to the classes of business in which they are commonly used.
- Fixing deductibles and top limits.
- The main clauses used in
- non-proportional contracts are examined in detail.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Reinsurance: Introduction

Suggested follow-on courses

Proportional Reinsurance
Facultative Reinsurance

Investment

Client site: £800 per group

P&I Clubs Introduction

Who would benefit?

New staff members or existing staff members who need a refresher on principles of P&I insurance. The course would also be suitable for support staff who want an understanding of how marine insurance operates

Objective

To give an understanding of the need for Protection and Indemnity insurance (P&I) - who buys and sells P&I and the intermediaries they deal with - the types of risks protected and an understanding of the legal principles together with the cover provided by the P&I market.

Content

- The function of P&I insurance - the buyers, sellers and intermediaries
- A consideration of the types of hull and liability cover provided by P&I Clubs
- How the P&I Clubs operate – the traditional market and fixed price clubs
- The services provided by P&I Clubs
- Underwriting Considerations
- Reinsurance

Duration

Two days

Investment

Client site: £2700 per group

Delegate comment

"The practical session calculating reinsurance premiums was most useful."

Personal Lines

Introduction

Who would benefit?

Ideally suited to people who have been working in insurance for less than 12 months who wish to understand the Personal Lines Market.

Objective

To give an overview of the main components of the Personal Lines Market

Content

- Obtain a broad knowledge of the developments in personal insurance
- Understand personal insurance products and covers available:
 - Household
 - Motor
 - Travel
- Gain an essential perspective of current market practices
- Explain the claims process
- Appreciate anti-fraud initiatives

Duration

One day

Pre-requisites

None

Investment

Client site: £1350 per group

Principles and Practice of Insurance

Who would benefit?

This highly interactive course is designed for those who have less than three years experience in insurance and work at technician or front line insurance level. The course provides the majority of the topics in the IF1 examination

Content

Insurable Interest

- Definition of insurable – The legal right to ensure
- Elements of insurable interest
- Apply the principle of Insurable Interest to case studies by stating when and how Insurable Interest arises

Utmost Good Faith

- Explain the doctrine of utmost good faith and to Whom it applies
- Define 'material' facts
- Understand the importance of disclosure of material facts
- Distinguish between perils and physical and moral hazards applying to selected classes of insurance
- Understand the legal, common law, remedies for breaches of utmost good faith as a result non-disclosure or misrepresentation of material facts
- Appreciate how the FSA restricts the right of insurers in responding to non-disclosure, misrepresentation, and breach of warranties and the distinction between retail and commercial customers
- Show an awareness of Law Commission proposals for reviewing disclosure

Underwriting & Documentation

- Explain the underwriting process and how underwriters use proposal forms, statements of fact, surveys, slips, meetings etc for risk assessment
- State the underwriting options, e.g. accept, decline, terms of cover etc.
- Outline the relevance and application of quotations
- Outline the internal and external factors that influence a premium rate
- Overview the function of the documentation used in insurance including – policies, cover notes, certificates, endorsements
- Review the operation of policy conditions and
- Explain the use of conditions, warranties the exclusions
- Show an awareness of how ICOB affects warranties

Indemnity

- Explain the principle of indemnity and how indemnity is assessed
- Recall the principal limitations that may prevent the insurer from giving a full

indemnity, e.g. sums insured, average clauses, deductibles/excesses, co-insurance, single article limit

- Outline the process of settling claims including the responsibilities of the insured and insurer
- Identify the people and documents that are used in investigating claims
- Distinguish between indemnity and non-indemnity policies (i.e. benefit policies)

Indemnity & Subrogation

- Explain the importance of subrogation and contribution at common law, how they arise and how they support indemnity
- Explain how policy terms and conditions modify the common law application of subrogation and contribution
- Apply the operation of subrogation and contribution to simple claims.

Proximate Cause

- Define the doctrine of proximate cause
- State how proximate cause guides us to the settlement of claims
- Demonstrate how the rules of proximate may be modified by a policy wording.

Duration

One day

Pre-requisites

Have attended Introduction to Insurance

Suggested follow-on courses

Introduction to the London Market

Investment

Client site: £1350 per group

Property Insurance: Introduction for all

Who would benefit?

This course has been designed for those who require a basic understanding of property insurance. It is suitable for those who work in the front line e.g. underwriting, claims or brokers or those who provide support e.g. IT, Outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of property insurance and the cover given.

Content

- What is property insurance?
- The types of risks found in special risks.
- Legal aspects.
- Property market.
- The types of insurance available and an outline of what is covered.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Insurance: Introduction

Investment

Client site: £800 per group

Proportional Reinsurance

Who would benefit?

This course has been designed for those who require a basic understanding of proportional reinsurance.

Objective

To give an understanding of why insurers buy Quota Share and Surplus Treaties, how these operate and to explain in detail the difference between them and the main clauses used.

Content

- The use of proportional treaties.
- How proportional reinsurance fits in with an insurer's complete reinsurance programme.
- A detailed description of treaties in relation to the classes of business in which they are commonly used and the differences between Quota Share & Surplus Treaties.
- A proportional treaty slip is examined and the main treaty clauses.
- Profit commission.
- Ceding commissions.
- Reserving.
- Cash loss.
- Accounting and portfolio transfers are examined in detail.
- Mixing Quota Share & Surplus Treaties.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Reinsurance: Introduction

Suggested follow-on courses

Non-Proportional Reinsurance
Facultative Reinsurance

Investment

Client site: £800 per group

Reinsurance Claims Handling:

Introduction

Who would benefit?

This course is for anyone starting their career in a reinsurance claims department either as a broker or a reinsurer.

Objective

To get a basic level of confidence and understanding of the adjustment of reinsurance claims.

Content

- What is reinsurance: Why is it bought, why is it written and what is its history
- Principles of insurance/reinsurance insurable interest, indemnity, average, reinstatement. The importance of policy definitions
- Different types of reinsurance fac, proportional and non proportional treaty – how they work and what they are best suited for
- Key clauses and wordings how they have been interpreted in the courts. What happens if there are gaps in the coverage
- Role of the claims department
- Functions of claims department What should claims team be doing?
- Case study: "A claim is made"
- practical review of a claim from start to finish highlighting issues with wordings and reviewing the decision making process (including claim file specific reserving, expert management etc)
- London market claims handling processes, role of XCS
- Review of any differences between handling different sorts of inwards claims (first party and third party)
- Letters of credit - use and operation
- Use of loss adjusters, lawyers and other outside experts
How should they be managed – can they be managed by reinsurers if acting for direct insurers only?
- Handling inspections of records and audits to maximum advantage - both inwards and outwards
Examples of inspection and audit results
- The "perfect" claims file
- What about your own reinsurance how should claims be handled to ensure the maximization of your outwards claims recoveries
- Introduction to loss reserving reasons for reserving; what is an accurate reserve; IBNR; the importance of technical reserves in insurance accounts - with simple worked exercises.

Delegate comment

"All areas of RI explained with clear examples."

- What if it all goes wrong
Litigation procedures and handling disputes: typical reinsurance arbitration procedures; brief introduction to ADR and mediation.
- FSA regulatory impact on claims handling and audits.
- Does anything change if either cedant or reinsurer is based in US or anywhere other than London?
- Course review - multiple choice question and answer test

Duration

One day

Pre-requisites

Basic introduction to reinsurance would be helpful however basics will be refreshed in this course

Investment

Client site: £1,350 per group

Reinsurance: Introduction

Who would benefit?

This course is designed for anyone who needs a basic knowledge of reinsurance. The course is suitable for those who work in the front line and support staff.

This course would also assist students of the Lloyd's and London Market Introductory Test.

Objective

To explain the purpose of reinsurance, why insurers purchase it and why it is needed; define key terms, expressions and abbreviations commonly used in reinsurance; describe, in overview, the contractual relationship of the parties. Name the main types of reinsurances and recognise how they protect insurers accounts; list the key features, benefits and disadvantages of facultative business; discuss: surplus treaties, excess of loss treaties working, catastrophe and aggregate layers. Calculate cessions, ceded premiums and claims recoveries.

Content

- Why insurers reinsure
- The reinsurance market
- A brief historical overview of reinsurance
- The development of reinsurance tools and their use within the insurance market
- How the reinsurance process works
- Calculating retentions and cessions
- Facultative v Treaty
- The types of reinsurance
- Proportional Treaties
- Quota Share
- Surplus
- Non Proportional Treaties
- Excess of Loss
- Aggregate Excess of Loss
- Catastrophe Excess of Loss
- Stop Loss

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Introduction to Insurance

Suggested follow-on courses

Facultative
Proportional
Non-Proportional Reinsurance

Investment

Client site: £1350 per group

Reinsurance Law

Who would benefit?

This course is for anyone who has knowledge of the principles and practice of reinsurance but wants to extend their knowledge of reinsurance law. The course would be useful for underwriters, claims handlers and wordings staff.

Objective

To provide a practical working knowledge of reinsurance law and to consider recent court decisions

Content

- The different legal systems
Common law; Civil law; Statute; Market custom; Where is the contract made; Jurisdiction and proper law; Local jurisdiction.
- Formation of the contract
Negotiations; Slips; Wordings; Clauses and cover notes - what takes precedent and why; Material facts; Utmost good faith; Jurisdiction - where is the contract made.
- The Law and duty of Agency
Role and responsibilities of the broker and the underwriter
- Market Reform Documentation
Legal aspects of Market Reform slips; the General Underwriting Agreement and Follow the Leader clause; the responsibilities of the leader under Market Reform and non-Market Reform slips; Signing down
- Wordings and Clauses
What is an event, occurrence and cause; Claims co-operation clause; Follow the settlement clauses; Service of suite clause; Back to back terms; Cut through clauses (USA and UK position); The meaning of Conditions; Warranty, Information and Estimates; Conditions precedent; Inspection clauses; E&O Clauses
- Interpretation of the Contract
How the court will interpret the written contract.
- Arbitration
The advantages of arbitration against litigation and how it works.

Duration

One day

Investment

Client site: £1350

Risk Management Introduction

Who would benefit?

This course is designed for staff that will benefit from an appreciation of the role and working environment of the Risk Manager. This would include new members of a risk management department or brokers or underwriters who deal with Risk Managers.

Objective

To understand the context of Risk Management and the logical stages in the process.

Content

- Identification of risk
- Analysis of risk
- Assessment and prioritisation of risks
- Risk controls
- Risk financing
- Monitoring and review

Duration

One day

Pre-requisites

Prior insurance knowledge is not essential; however Insurance: Introduction would help with terminology.

Suggested follow-on course

Property, Pecuniary and Liability Insurance: Introduction

Investment

Client site: £1350 per group

Special Risks Insurance: Introduction for all

Who would benefit?

This course has been designed for those who require a basic understanding of special risks insurance. It is suitable for those who work in the front line e.g. underwriting, claims or brokers or those who provide support e.g. IT, outwards reinsurance, finance, broker back-up, secretarial or administration staff.

Objective

To give an overview of the risks written in Special Risks insurance and the cover given.

Content

- What is special risks insurance?
- Types of risks found in special risks.
- Legal aspects.
- Special risks market.
- Types of insurance available and an outline of what is covered.

Duration

Half day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by:
Introduction: Insurance
Marine: Introduction for support roles, would prove useful for a delegate

Investment

Client site: £800

War and Terrorism Introduction

Who would benefit?

This course is for those involved in the placing of claims of this class of business either in a front line or supporting role.

Objective

To obtain a clear understanding of the class of business, the external drivers that lead to demand for the cover and the various markets available.

Content

- Definitions
- Distinction between marine, non marine and aviation war
- Review of the external drivers
- How do standard insurance wordings deal with these risks
- What is the market
- Overview of standard market wordings to identify the extent of cover offered

Duration

Half day

Pre-requisites

Basic understanding of insurance concepts

Investment

Client site: £800 per group

Flexible IT Training Delivery Styles

4D Group appreciate that in this day and age time is of the essence for everyone. Taking a whole day out of the office during the working week to attend a course can sometimes prove difficult. Individuals may find that they require knowledge in one or two specific areas only, from a full day's course. To address this issue 4D Group offer flexible training delivery styles on a range of Information Technology courses.

Training delivery styles available include:

One-to-one sessions

Clinic style workshops "sushi style"

Delegates are invited to complete our training needs analysis forms which can be found on our website www.4DGroup.co.uk and select which areas they would like to address. They will then receive one to one training on their preferred chosen topics at a date and time to suit them. This service is provided by the hour for a minimum of two hours.

The above training styles are available in the following Microsoft Products:

- Outlook
- Word
- Excel
- PowerPoint
- Access

Investment

£120 per hour or part thereof with a minimum of two hours

Traditional Group Training Style

A group session can be held for between two and ten delegates, on a half or full day basis, covering the areas detailed on the course specifications.

4D Group are happy to work with you to tailor-make a course to match the required skills of the delegates and/or the business need.

Information Technology Portfolio

Below is a list of the more popular software within our Information Technology portfolio. However, if the course you are looking for is not listed here, or you wish a course to be tailored to suit your specific requirements, simply contact us.

All courses can be tailored and delivered to all levels.

Titles listed in **blue** indicate the page number where the course contents are detailed in this directory.

Have you considered tailoring your IT training i.e. [Essential Excel Skills for the Administrator](#) or combine IT with personal development skills i.e. [Business Report Writing with Word Report Writing Tools](#) or [Presentation Skills with PowerPoint](#).

A / B

Access	300
ACT	
ACTive Server Pages: ACTive X	
Adobe (All Products)	
Acrobat	31
Apple Mac	
Artemis MS Project gateway	
Active Server Pages (ASP)	
AutoCAD	
AutoSketch	
A+	
Back Office	
Business Objects	

C

C#	
Claris (All Products)	
Client Server Programming	
Cold Fusion (Allaire)	
Corel (All Products)	
Crystal Reports (Seagate)	31

D

Desktop Efficiency	
Dimensions	
Direct X	
Dragon Dictate	
Dreamweaver	32

E

ECDL European Computer Driving Licence	
Excel	32
Exchange Server	

F

FireWorks	
Flash	
FlowCharter (ABC)	34
FoxPro	
Freehand	
FrontPage	34

G / H

GGI using PERL	
GoldMine	
Harvard Graphics	
Help Desk/Support Engineer	
Hotmetal Pro	
HTML (and Security)	

I

InDesign	35
Internet (All aspects)	
IntranetWare	

J

Java Applets	
Java Script	

K / L

LAN Manager	
Linux	
Lotus (All products)	

M

Mac System	
MacDraw and MacFlow	
Macromedia (All products)	
Maxim	
Maximiser	
Microsoft (All products)	
Mobile working	
MOUS	
MSIIS	
MVS Appreciation	

N

.Net (All Products)	
NetG	
NetMeeting	
NetObjects Fusion	
Netscape (All products)	
Netware	
Network Fundamentals	
Novell (All products)	
NT4	

O

Omni Page Pro	
Oracle	
OS/2	
Outlook	35

P

PageMaker	35
PaintShop Pro	36
Paradox	
Pascal	
Photoshop	36
PowerPoint	36
Project	37
Publisher	37
Publishing on the Internet	

Q

Quark Express & Immedia	
Quattro Pro	
QuickBasics	
QuickBooks	

S

Sage (All Products)	
SAP	
SGML	
SQL (All areas)	
SSADM	

T / U / V

Technical IT	40
TCP/IP	
Unix	
VB Script	
Vector Works	
Ventura	
Visio	38
Visual Basic	38
Visual C++	
Visual Fox Pro	
Visual InterDev and ASP	
Visual J++	
VSAM	

W

Web Page Scripting	
Web Express	
Web Site Design	
Windows Install & Administration	
WinZip	
Word	38
WordPerfect (All Products)	

Access Introduction

Who would benefit?

This course is for those who wish to gain a sound understanding of the basic concepts of database application and design and who need to make effective use of Access.

Objective

To build a controlled database example which encompasses the majority of Access's facilities as a fully relational database and to develop this example into a full working model.

Content

- Discuss individual's needs.
- Database concepts, design and Access terminology.
- Tables, Table Wizard, field properties and validation.
- Form Wizard, customisation, calculations and statistics.
- Relationships across multiple tables and relationship options.
- Use queries and relate tables.
- Sort, filter and calculate through queries.
- Indexing.
- Concepts and design of main and sub-forms.
- Use main/sub-forms to control data entry and group statistics.
- Add records and build filters to find records.
- Report Wizard; group total reports and labels.

Duration

One or two days

Investment

Client site: 1-1 £360: Group £495

Access Intermediate

Who would benefit?

This course is intended for people who will be involved either in the specification or physical design of databases within their organisation.

Objective

To expand on skills learnt in the introductory course, including effective management of issues presented by one to many relationships.

Content

- Discuss individual's needs.
- Revision.
- Concepts and uses of main and sub-forms.
- Main and sub-form design.
- Controlling data entry.
- Group statistics.
- Sections of a report.
- Calculating in reports.
- Merging from Word.
- Query Wizards.
- Crosstab.
- Find duplicates.
- Find un-matched.
- Action queries.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Access Introduction

Investment

Client site: 1-1 £360: Group £495

Access Advanced

Who would benefit?

This course is for those who have a good working knowledge of Access and who wish to explore the full potential of this software.

Objective

To give participants the ability to make effective use of the advanced features of Access and the use of macros in a highly practical course.

Content

- Discuss individual's needs.
- Revision.
- Speedy queries and fast updates.
- Complex forms:
 - main and sub-form techniques.
 - Advanced reporting techniques.
- Macro design, groups and conditions.
- Set up menu systems.
- Dialogue boxes, menus and buttons.
- Forms.
- Attach macros to controls.
- Write basic modules with error traps.
- Use Access with other applications.
- Multi-user implications and locking options.
- Understand compression and bottlenecks to enhance performance of Access.
- Customisation, administration and security.

Duration

Two days

One day (reduced subject cover)

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Access Intermediate

Investment

Two days

Client site: 1-1 £720: Group £990

One day:

Client site: 1-1 £360: Group £495

Delegate comment

"Since attending the course my team can do much more with the data we receive in the department, and they are busy planning reports and queries they want to build."

Delegate comment

"The training delivered exactly what I wanted."

Access VBA

Who would benefit?

This course is designed for experienced Access users who wish to build applications and need to take advantage of the programming features.

Objective

To give participants an understanding of the Access VBA programming language and its capabilities in a highly practical course.

Content

- Discuss individual's needs.
- Basic programming structures:
 - decisions
 - loops
 - date functions
 - string manipulation
 - use within forms and queries.
- Collections and properties:
 - manipulate forms, controls and properties
- Data Access Objects.
- Respond to events within forms.
- Error handling:
 - trap run-time errors
 - debug modules.
- Data manipulation:
 - create and edit tables and queries in code
 - move through data
 - locate records
 - transactions
 - basic vs. queries.
- Communicate with other applications using OLE and DDE libraries and DLL's:
- write general purpose procedures
- use standard window procedures.
- Create a working application.

Duration

Two days

One day (reduced subject cover)

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Access Advanced

Investment

Two days

Client site: 1-1 £720: Group £990

One day:

Client site: 1-1 £360: Group £495

Acrobat Introduction

Who would benefit?

This course is for users or potential users of Adobe Acrobat and need to produce and work with PDF files.

Objective

To give an introduction to the facilities within Adobe Acrobat allowing participants to make efficient use of this software.

Content

- Discuss individual's needs.
- PDF format and view files.
- Acrobat and Acrobat Reader.
- Create PDF files for screen and print.
- Acrobat layout and zoom tools.
- Modify PDF files.
- Insert, replace, extract, and delete pages.
- Create, modify links and bookmarks.
- Create cross link documents.
- Text marking and notes tools.
- Insert comments and free text.
- The stamp, crop and movie tools.
- Create file attachments.
- Graphic creation tools.
- Create and read articles.
- Introduction to digital signatures.
- Introduction to the form tool.
- Create full screen documents.
- Create and search an index.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

Crystal Reports Introduction

Who would benefit?

This course is for those individuals who want to be able to interrogate and utilize data constructively with Crystal Reports and make available to other users.

Objective

At the end of the course the delegate will understand data sources, dictionaries, linked tables and use basic formulae & functions including grouping, filtering and sorting. To be able to format the results and work in design.

Content

- Discuss individual's needs.
- Establish data sources available.
- Understand dictionary concepts.
- Create dictionaries where applicable
- Select and link tables.
- Change column widths and headings.
- Adjust numeric formats.
- Save and name files and reports.
- Create and edit formulae fields.
- Calculate with AutoSum and other formulae.
- Create variables.
- Use filters and filter parameters.
- Group data with breaks and sections.
- Totals and sub totals.
- Use conditions.
- Alphanumeric and multi-level sorts.
- Work with reports.
- Work with charts.
- Define and format Crosstabs.

Duration

One day

Further levels

Crystal Reports Advanced

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"Everything was easy to understand and follow."

Dreamweaver

Introduction

Who would benefit?

This course is for users who are new to Dreamweaver and who would like to edit and manage their Web site.

Objective

To gain practical experience in how to manage their Web pages using Dreamweaver using text, tables, images and links.

Content

- Discuss individual's needs.
- Dreamweaver Basics.
- Internet access and HTML.
- Dreamweaver environment.
- Edit an existing page.
- Create tables, change table layout.
- Table attributes.
- Format text in tables.
- Create a Basic Web Page.
- Create and format text.
- Work with colour.
- Design a Web Site.
- Work with the site window.
- Work with text and import text.
- HTML text and styles.
- Format characters and paragraphs.
- Import and work with images.
- Use images as links.
- Work with links within a site.
- Anchors.
- Work with external links.
- Upload a Web Site.
- Check your site.
- Upload your site.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

Excel

Introduction

Who would benefit?

This course is for those just starting to use Excel or who wish to gain confidence with the package. A working knowledge of Windows is assumed for those attending the course.

Objective

To give an introduction to major areas of Excel: the workbook and graphs.

Content

- Discuss individual's needs.
- Enter, edit and copy data.
- Use simple formulae and functions eg SUM, COUNT, TODAY, IF.
- Sheet proofing.
- Relative and absolute references .
- Toolbars.
- Format cell ranges.
- Workbook presentation.
- Save and print worksheets with headers and footers.
- Produce and edit graphs.
- AutoFilter.
- Subtotals.
- Introduction to Pivot Tables.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

Excel

Intermediate

Who would benefit?

This course is for those with a good working knowledge of Excel who wish to gain more from the facilities available and create more complex spreadsheets.

Objective

To build on the participants' current skills and gain practical use of the more advanced features.

Content

- Discuss individual's needs.
- Revision.
- Customise formatting cell contents
- Create and use styles
- Multiple sheets and linking within a workbook and linking between workbooks
- More advanced functions
- Logical functions to test a value (IF, AND, OR)
- Calculating values based on given criteria (SUMIF, COUNTIF)
- Lookup and reference functions (VLOOKUP, HLOOKUP)
- Using IS functions to test value types in cells (ISERROR, ISBLANK)
- Text functions – merging and extraction portions of text
- Date and time functions
- ROUND, ROUNDUP and ROUNDDOWN
- Nesting functions including IF and VLOOKUP
- Performing multiple calculations
- Data Lists
- Use the data form
- Find data
- Set find criteria
- Sort information
- Create sub totals to more than one level
- Analyse data in the database
- Format data as a Table
- Apply the Auto filter
- Set custom Auto filter options
- Use the Subtotal function .
- Analyse data with Advanced Filter
- Filter data using the advanced filter
- Set criteria
- Extract data to other locations
- Filter for unique records
- Analyse information using PivotTables
- Create a PivotTable
- Modify the PivotTable and change data orientation
- Recalculate the PivotTable
- Set PivotTable options
- Customise field names
- Change field formatting

Delegate comment

"The course was well structured and very well delivered. It gave me a good grounding in advanced

- Work with summary calculations (change, add running totals, differences year on year, % differences, % of row, column, total or other field)
- Add calculated fields and add calculated items
- Work with subtotals
- Use the group facility
- Use multiple consolidation ranges
- Pivot Charts
- Ranges, labels and lists
- Create named ranges
- Use range names in formulas
- Link a name to a validation list
- Summarise data using data consolidation
- Define ranges
- Consolidate data
- Create links in consolidated data
- Create views in large spreadsheets
- Set up your view
- Create a view
- Apply a view
- Creating data validation lists from ranges
- Set number and date validation
- Set drop down list validation
- Set custom validation
- Conditional linking
- Use the outline facility
- Protect worksheets and workbooks
- Advanced graphics
- Customise toolbars

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Excel Introduction

Investment

Client site: 1-1 £360: Group £495

Excel

Advanced

Who would benefit?

This course is designed for those who have a good working knowledge of Excel and who wish to explore the full potential of this software.

Objective

To give participants a greater understanding of the creative use of Excel's advanced formulae, functions, database lists and macros.

Content

- Discuss individual's needs.
- Revision.
- Discuss individual's needs and revision
- Advanced functions
- Lookup and reference functions (VLOOKUP, HLOOKUP, INDEX, MATCH)
- Using IS functions to test value types in cells
- Nest with IF, LOOKUP, AND, OR
- Interrogate information from other sources
- Formula Auditing
- Using the auditing facility
- Tracing how formulas are made up
- Evaluating formulas
- Goal Seek.
- Scenario Manager
- Record macros
- Name conventions and storage locations
- Absolute and relative cell addressing
- Run macros
- Assign macros to toolbar buttons.
- Create menus
- Assign macros to objects/buttons on the worksheet
- Create Macro Toolbars
- Creating a custom toolbar.
- Adding macro buttons to the toolbar.
- Attaching the toolbar to a workbook
- Macro Management
- Deleting macros
- Setting macro options
- Macro security
- The Visual Basic Environment
- Project explorer
- Code window
- Properties window
- Work with Code
- Code structure
- Adding comments
- Navigating within your code
- Editing macro code
- Getting help with syntax
- Commonly Used Commands

- Workbook and worksheet commands.
- Excel selection methods
- Debugging
- Errors
- Compiling
- Using Debug
- Function Procedure
- Function macros.
- Creating function macros as add-ins.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Excel Intermediate

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"I really liked the interaction between the trainer and ourselves. No question was too silly."

Excel VBA

Who would benefit?

This course is designed for experienced Excel users who wish to build applications and need to take advantage of the programming features.

Objective

To give participants an understanding of the programming language and its capabilities.

Content

- Discuss individual's needs.
- Basic procedure to record and run macros.
- Edit the module, comments, keywords, errors etc.
- Personal workbook.
- Cell selection.
- Indeterminate ranges.
- Record relative references.
- Control structures.
- If...Then...Else statement.
- Create functions using keywords to make decisions.
- Perform calculations.
- Create an Add-In.
- Workbook functions.
- Loops and sub-routines.
- Repeating macros.
- Commands:
 - Do
 - Do...Until
 - While...Wend
 - For...Next
 - For...Each...Next
- Use a counter.
- Debug window - watch pane/intermediate pane.
- Understand language: functions, methods, objects, properties, statements, keywords, object browser and collections.
- Dialogue box controls.
- Input and message boxes.
- Index and referencing the returns.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Access Advanced

Investment

Client site: 1-1 £360: Group £495

Flowcharter

Introduction

Who would benefit?

This course is for those who wish to understand and create effective flowcharts.

Objective

To give individuals the ability to create and modify complex yet effective flowcharts.

Content

- Discuss individual's needs.
- Set up initial preferences.
- Select and place shapes.
- Shape attributes and fills.
- Connect shapes.
- Line attributes.
- Text in charts.
- Format text.
- Align and space objects.
- Snap features.
- Notes and shape numbers.
- Link flowcharts.
- Link files.
- Print.
- Preference options.
- The object palette.
- Create layers.
- Work with cool-sheets.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

FrontPage

Introduction

Who would benefit?

This is for those new to FrontPage and who would like to create and manage interesting Web pages.

Objective

To gain practical experience in how to design, create and manage their Web pages using FrontPage with text, tables, images and links and subsequently publish a Web page.

Content

- Discuss individual's needs.
- Concepts of Web site design.
- Design issues.
- Create a new Web site.
- Work with wizards and templates.
- Create, edit and save Web pages.
- URL and page title differences.
- Create a frames page and adjust their properties.
- Create hyperlinks and to send email.
- Test hyperlink in a browser.
- Reports, hyperlinks and tasks views.
- Track the file structure.
- Use themes to build Web pages.
- Add tasks to Web pages.
- Edit Web Pages.
- Insert and modify images.
- Understand image file formats.
- Add and format text.
- Add animation effects.
- Background properties and textures.
- Scrolling marquee and properties.
- Auto thumbnail.
- Insert Office documents into page.
- Use bookmarks to aid accessibility.
- Test Web pages in a Web browser.
- Use tables to improve page clarity.
- Insert images into tables.
- Add and format text in a table.
- Merge and split cells.
- Change table appearance.
- Publish a web site.
- Publishing issues.

Duration

One day

Further Levels

FrontPage Advanced
FrontPage and ASP

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"The trainer made sure everyone followed everything that she was going through."

Delegate comment

"The trainer made sure everyone followed everything that she was going through."

InDesign

Introduction

Who would benefit?

This is for those new to InDesign produce professional documents with the features in this software.

Objective

By the end of the course, delegates will be able to put together complex documents.

Content

The Interface

- Single and facing masters
- Tool palette and options bar
- Change views and navigating
- Units and measurements
- Fonts and paper size

Creating documents

- Create a new document
- Set margin guides
- Use guides, rules and grids
- Defaults and preferences

Creating objects

- Draw shapes and lines
- Modify existing objects
- Direct selection tools
- Select, move and duplicate objects
- Align objects

Colour

- SPOT, CMYK, RGB explained
- Swatches palette
- Create tints and gradients
- Apply colour to fills and strokes
- Use gradient tools.

Working with text

- How text boxes work
- Place and typing text
- Text frame options
- Thread text frames
- Automatic text frame functions
- Font face/size/colour
- Font alignment
- Paragraph formatting
- Leading, kerning and tracking
- Create drop caps.
- Tabs and leaders
- Create paths from text outlines

Images

- Place images
- Resize images
- Image types
- Clipping paths
- Repair broken links

Outputting documents

- • Set up documents for printing
- • Print options and styles
- • Flight checking

Duration

One or two days

Further Levels

InDesign Advanced

Investment

Client site:

1-1 £360: Group £495 per day

Outlook

Who would benefit?

This course is for those who want to communicate by email, record events in their diary, control their to-do list and to keep a record of their contacts using Outlook.

Objective

To provide individuals with the necessary knowledge to use the different areas in Outlook.

Content

- Discuss individual's needs.
- What is Outlook.
- Customise views.
- Use folders.
- Archive messages.
- Work with categories.
- Create, reply, and recall messages.
- Use address book.
- Store distributions lists.
- Work with flags.
- Use buttons to limit responses.
- Work with attachments.
- Add your signature automatically.
- Use mail templates (themes).
- Use Out of Office Assistant.
- Work with rules.
- Schedule single appointments.
- Schedule reoccurring appointments.
- Plan meetings with others.
- Store details of your contacts.
- Use the tasks facility.
- Assign tasks to others.
- Work with tasks assigned to you.
- Regenerate tasks.
- Use notes.
- Use the find and organise facilities.
- Customise Outlook.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

PageMaker

Introduction

Who would benefit?

This course is for those who wish to understand and create effective publications using PageMaker.

Objective

To give individuals the ability to create and modify a publication to a professional standard.

Content

- Discuss individual's needs.
- Create a publication.
- Layout view.
- The toolbox and control palette.
- Insert and placing a heading.
- Add column guides.
- Place text.
- Create a new page.
- Insert a headline.
- Insert and place a graphic in text.
- Control text wrap.
- Text wrap an irregular shape.
- Create drop shadows.
- Use the polygon tool.
- Create a mask.
- Use drop caps.
- Story editor.
- Placeholders.
- Create and edit layers, master pages and styles.

Duration

One day

Further level

PageMaker Advanced

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"The best thing about this course was the handy shortcuts that I learnt and the trainer's response to delegate questions was first rate."

PaintShop Pro

Introduction

Who would benefit?

Individuals who are new to image manipulation software and graphics

Objective

To understand PaintShop Pro components and use some of the tools to control text and colour intricacies and prepare an image for printing. Use filters and available add-ins and create, modify, print and apply effects to different types of computer images.

Content

- Discuss individual's needs
Differentiate image file formats.
- Palettes and tools select and reposition.
- Move, add to and subtract from selections.
- Rotate, scale and deform selections.
- Combine selection tools.
- Save a selection as a channel.
- Work with shape selection tools.
- Use crop, feather and invert.
- Use marquee, lasso, and magic wand tools to select parts of an image.
- Constrain selection movement.
- Work with layers and text layers palette.
- Use opacity and apply blend modes.
- Group layers.
- Add text and control layer effects.
- Create save and apply masks.
- Masks and file options.
- Control photographic effects.
- Use rubber stamp tool to eliminate unwanted objects from an image.
- Replace parts of an image with another image.
- Work with a variety of filters.
- Thumbnail properties and preferences.
- Copy, delete, move and print options.

Duration

One day

Further level

PaintShop Pro Advanced

Investment

Client site: 1-1 £360: Group £495

PhotoShop

Introduction

Who would benefit?

This course is for those who would like to scan, prepare and manipulate graphics as well as basic banners and then export to the Web.

Objective

To gain practical experience in how to scan and control graphics and to be able to create various professional effects on their Web page.

Content

- Discuss individual's needs.
- Overview of PhotoShop.
- Scanning and image resolution.
- Cleaning a scanned image.
- Methods of capturing images.
- Vector vs. bitmap images.
- Layers:
 - work with palettes
 - selections and layers
 - file sizes and layers.
- Tools and formatting
 - eraser tool
 - erase to history.
- Pencil and airbrush tools.
- Working with brushes.
- Foreground/background colours.
- Sampling colour.
- Resize and crop images.
- Text layers and text alteration.
- Masks
 - magic wand, lasso
 - rectangle marquee to create masks
 - add / subtract from a mask
 - understand tolerance options
- Navigation
- Zoom and navigator options.
- Image manipulation.
- Fill a selection.
- Gradient fills.
- Edit a curved segment.
- Feathering.
- RGB and CMYK colours.
- Blur and sharpen image areas.
- Combine multiple images.
- Change image modes.
- Place graphics on Web page.
- Use multiple layers.
- Effects available with layers.
- Simple banners and buttons.

Duration

One day

Further level

PhotoShop Intermediate & Advanced

Investment

Client site: 1-1 £360: Group £495

PowerPoint

Introduction

Who would benefit?

This course is for users or potential users of PowerPoint who have a working knowledge of Windows and need to produce slides or documents for printing or presentations.

Objective

To give an introduction to PowerPoint allowing participants to make efficient use of this advanced graphics package.

Content

- Discuss individual's needs.
- Overview of PowerPoint.
- Create a presentation.
- Insert, edit and format text and bullet points.
- Tabs and text search options.
- Page layouts.
- Work with multiple views.
- Insert, edit, control and manipulate objects.
- Work with ClipArt.
- Insert, edit and format charts.
- Organisation charts.
- Apply templates.
- Work with slide master.
- Use slideshow.
- Transition effects.
- Use of effective animation.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"The trainer made it easy for people to follow and answered every query fully."

PowerPoint Advanced

Who would benefit?

This course is for those with a good working knowledge of, and need to make the most of, all the more advanced facilities to enhance their presentations.

Objective

To give participants practical use of the advanced features in PowerPoint allowing participants to make efficient use of the advanced topics.

Content

- Discuss individual's needs.
- Revision.
- Enhance graphs and diagrams.
- Import data from spreadsheet applications to create charts.
- Enhance organisation charts.
- Advanced drawing features:
 - arrange
 - align
 - setting object defaults
- Speaker notes
- Handouts and printing the outline.
- Use the Pack and Go facility.
- Create an interactive slideshow.
- Work with Slide Master.
- Customise presentation to company standard.
- Create, edit and save templates.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by PowerPoint Introduction

Investment

Client site: 1-1 £360: Group £495

Project Introduction

Who would benefit?

This course is aimed at new or inexperienced users who need to plan, monitor and communicate schedule details using the tools within Project.

Objective

To give an understanding of how to define and create a project structure, determine task relationships and constraints, allocate and manage resources and to produce professional reports and charts.

Content

- Discuss individual's needs.
- Define a project.
- Project calendar.
- Work with tasks and their duration.
- Create a logical sequence.
- Structure projects.
- Create and assign resources and constraints.
- Lag and lead time.
- Task grouping.
- Setting the critical path.
- Manage deadlines and project costs.
- Define multiple resource rates and assign fixed costs to tasks.
- Fundamentals of resolving over-allocations.
- Manage and update actual task information.
- Overview of filters, views and reports.
- Save a project baseline.
- Track a project as scheduled.
- Track work by time period.
- Save an interim duration.
- Print project reports.

Duration

One day

Further Levels

Project Advanced

Investment

Client site: 1-1 £360: Group £495

Publisher Introduction

Who would benefit?

This course is aimed at new or inexperienced users who need to will able to put together booklets and newsletters using the tools within Publisher.

Objective

To give an introduction to Publisher allowing participants to make efficient use of this desktop publishing package.

Content

- Discuss individual's needs.
- A guide to layout and design
- Terminology
- Toolbox and control palette
- Drawing frames
- Selecting objects
- Creating a publication
- Guides and rulers
- Managing Pages
- Master and multiple master pages
- Page setup, headers/footers
- Import graphics, Word/ClipArt
- Drawing
- Format and control shapes
- Layers and groups
- Work with text, wrap, frames
- Text format, styles, schemes, tabs
- Indents, bullets, numbers
- Horizontal rules
- Spell check and AutoCorrect
- Text flow and AutoFit
- Text box and text frames
- Graphics manager
- Design checker
- Effective tables

Duration

One day

Further Levels

Publisher Advanced

Investment

Client site: 1-1 £360: Group £495

Manager's comment

"All the attendees came back into the office today to say how good the trainer was and how much they learnt! They were raving about how much fun they had learning and are busy putting it all to practice! This has to be the first time I have heard so many people coming out of a training course really feeling they learnt so much."

Visio

Introduction

Who would benefit?

This course is for users or potential users of Visio and need to produce diagrams and drawings.

Objective

To give an introduction to Visio allowing participants to make efficient use of this advanced drawing package.

Content

- Discuss individual's needs.
- Overview of Visio.
- Work with pages:
 - foreground/background, rotate and resize, scale and orientation.
- Multiple page diagrams and linking shapes.
- Use drawing tools:
 - rotate
 - arrange
 - group
 - format shapes.
- Use stencils, connect shapes, add text to shapes and use the stamp tool.
- Use and apply styles.
- Print and print preview.
- Colour, display/hide, lock and print layers.
- Share diagrams with other applications.
- Automate repetitive tasks.
- Create master shapes, templates and stencils.

Duration

One day

Further level

There are many versions of Visio and we can offer training in all versions and to the advanced level.

Investment

Client site: 1-1 £360: Group £495

Visual Basic

Programming

Who would benefit?

This course is for non-programmers who will need to use Visual Basic and learn the fundamentals of programming in the process.

Objective

To understand the principles of how to create a system that provides fast and effective solutions to pressing business needs.

Content

- Discuss individual's needs.
- Introduction to the design environment.
- Explore data types.
- VB procedure and functions.
- Work with forms.
- Use command driven controls.
- Create and use control arrays.
- Debugging and tracing execution.
- Error trapping.
- Collections and dictionaries.
- Application information.
- Screen and active objects.
- Data bound controls.

Duration

Between three and five days

Investment

Client site: Group £675 per day

Word

Introduction

Who would benefit?

This course is for users who have a working knowledge of Windows and wish to use Word to create simple documents.

Objective

To give participants an introduction to some of the powerful, yet easy-to-use features of this word processing package.

Content

- Discuss individual's needs.
- Facilities overview.
- Create, edit, save, find and print documents.
- Format text:
 - bullets
 - numbers
 - Indentation
 - tabulation.
- Use paragraph styles.
- Use Auto Text.
- Use and customise toolbars.
- Use tables to control text.
- Control margins and page breaks.
- Simple headers and footers:
 - text
 - page numbers.
- Work with document views.
- Spell and grammar check.
- Auto Correct.
- Search and replace facility.
- Use properties to aid file location.
- File management.
- Customise toolbars.

Duration

One day

Investment

Client site: 1-1 £360: Group £495

Delegate comment

"I appreciated the hands on approach and the trainer's understanding of the subject."

Word Intermediate

Who would benefit?

Experienced Word users who want to take their working knowledge a stage further wish to use the more advanced facilities to create more complex documents. A good working knowledge of Word is advised for the participant to gain most from the course.

Objective

To build on the participants' current skills and gain practical use of the more advanced features to use on return to the workplace.

Content

- Discuss individual's needs.
- Revision.
- Create, modify and manage styles.
- Multi-level numbering styles.
- Work with document sections.
- Work with outline facility.
- Customise different headers and footers on different pages.
- Control a document with both portrait and landscape pages.
- Revision marking using track change facility.
- Personalise letters with mail merge.
- Labels and envelopes.
- Use the version facility.
- Sort text and paragraphs.
- Link information from Word or Excel files, import to PowerPoint.
- Work with graphics and control text around graphics.
- Customise default options.
- Create your own toolbar.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Word Introduction

Investment

Client site: 1-1 £360: Group £495

Word Advanced

Who would benefit?

This course is for anyone required to make efficient use of advanced formatting and to begin to automate documents.

Objective

To give participants practical use in some of the advanced facilities to get the most from the package.

Content

- Discuss individual's needs.
- Revision.
- Work with long documents and outlines.
- Table of contents and index.
- Footnotes and endnotes.
- Columns.
- Work with document sections.
- Create, modify and manage styles.
- Use bookmarks and fields to automate work.
- Use the form facility and protection.
- Create, edit, modify and save templates.
- Add fill-in fields to template.
- Customise Word.
- Introduction to macro recording.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Word Intermediate

Investment

Client site: 1-1 £360: Group £495

Word VBA

Who would benefit?

This course is for those who need to automat the procedures by which they create and edit documents through the use of fields and macro facilities.

Objective

The individual will gain a practical working knowledge of Word VBA facilities within Word to automate functions and create documents.

Content

- Discuss individual's needs
- Insert and manage:
 - fields and field switches
 - form fields.
- Insert and use bookmarks.
- Record, edit and run macros.
- Run macros methods.
- Create and use templates.
- Add Fill-in fields to templates.
- Use automatic macros in templates.
- Use fields and bookmarks.
- Use Word VBA:
 - statements
 - functions
 - variables, arrays and expressions
 - relational/logical operators.
- Word VBA statements and functions:
 - user Input and screen output
 - flow control statements
 - error handling
 - sub routines and functions.
- Dialogue boxes:
 - default and customised.
- Automatic macros in templates.
- Statements and functions for:
 - user input
 - flow control statements
 - error handling
 - sub-routines and
 - user-defined functions.
- Word VBA operators.
- Default and customised dialogue boxes.

Duration

One day

Pre-requisites

It is assumed anyone attending this course has either attended or has the knowledge provided by Word Advanced

Investment

Client site: 1-1 £360: Group £495

Delegate comment
 "The training was most relevant to my day-to-day work."

Technical Information Technology

Price on application

.NET Framework Development

- 2124c Programming with C#
- 2349b Programming with the Microsoft .NET Framework (Microsoft Visual C# .NET)
- 2350b Developing and Deploying Secure Microsoft .NET Framework Applications
- 2373b Programming with Microsoft Visual Basic .NET
- 2389b Programming with Microsoft® ADO.NET
- 2415b Programming with the Microsoft .NET Framework (Microsoft Visual Basic .NET)
- 2500a Introduction to XML and the Microsoft .NET Platform
- 2524c Developing XML Web Services Using Microsoft ASP .NET
- 2555a Developing Microsoft .NET Applications for Windows (Visual C# .NET)
- 2557a Building COM+ Applications Using Microsoft .NET Enterprise Services
- 2558a Programming with Managed Extensions for Microsoft® Visual C++® .NET
- 2565a Developing Microsoft .NET Applications for Windows (Visual Basic .NET)
- 2609a Introduction to C# Programming with Microsoft .NET
- 2640A Upgrading Web Development Skills from ASP to Microsoft ASP .NET
- 2663a Programming with XML in the Microsoft .NET Framework
- 2727a Developer Skills Builder for Microsoft .NET

.NET Mobility

- 2530b Introduction to Microsoft Windows CE .NET
- 2545a Developing Embedded Solutions for Windows XP Embedded
- 2556a Developing Mobile Applications Using the Microsoft .NET Compact Framework

.NET Servers

- 2362A Deploying Microsoft .NET Applications for Systems Engineers
- 2379a Developing and Deploying Microsoft BizTalk Server 2000 Solutions

Application Architecture & Development

- 2526A Developing Distributed Applications with Microsoft .NET Remoting
- 2710b Analyzing Requirements and Defining Microsoft .NET Solution Architectures

E Business

- 2157B Developing E-Business Solutions Using Microsoft Biz-Talk Server 2004
- 2158A Deploying and Managing E-Business Solutions Using Microsoft BizTalk Server 2004
- 2728a Building Microsoft BizTalk Server 2002 Solutions
- 2729a Building Microsoft Commerce Server 2002 Solutions
- 2730a Building Microsoft Content Management Server 2002 Solutions

Exchange Server

- 1026c Microsoft Exchange Server 5.5 Series: Concepts and Administration
- 1572c Implementing and Managing Microsoft Exchange 2000
- 1573b Designing Microsoft Exchange 2000 for the Enterprise
- 1618a Microsoft Exchange Server 5.5 Series: Managing the Exchange Extensible Storage Engine (ESE) Database
- 2008a Designing and Planning a Microsoft Exchange Server 2003 Organization
- 2009a Upgrading Your Skills from Microsoft Exchange Server 5.5 to Microsoft Exchange Server 2003
- 2011a Troubleshooting Microsoft Exchange Server 2003
- 2400b Implementing and Managing Microsoft Exchange Server 2003
- 2400C Implementing and Managing Microsoft Exchange Server 2003

FrontPage 2000

- 1592a Creating and Managing Web Solutions Using Microsoft FrontPage 2000
- 1932a Building a Data-Driven Web Site Using Microsoft FrontPage 2000

Identity Integration Server

- 2731A Deploying and Managing Microsoft Identity Integration Server 2003

Internet Information Server

- 2295a Implementing and Supporting Microsoft Internet Information Services 5.0
- 2576A Implementing and Administering Microsoft Internet Information Services (IIS) 6.0
- 2694a Updating Web Server Skills to Internet Information Services 6.0

Internet Security and Acceleration Server

- 2159a Deploying and Managing Microsoft Internet Security and Acceleration Server 2000
- 2824B Implementing Microsoft Internet Security and Acceleration Server 2004

Introduction to Software Development

- 1300a Mastering Microsoft Access 2000 Programming
- 2667a Introduction to Programming

IWorker

- 4001A Team Collaboration Using Microsoft® Windows® SharePoint® Services
- 4002A Forecasting and Trend Analysis Using Microsoft® Office Excel® 2003
- 4002A 4010A DVD files only
- 4003A Summarizing Microsoft® Office Excel® 2003 Data to Make Better Business Decisions
- 4004A Managing Critical Business Information Using Microsoft® Office Access 2003
- 4005A Beyond the Spreadsheet: Managing Financial Information Using Microsoft® Office Access 2003
- 4006A Time and Task Management Using Microsoft® Office Outlook® 2003
- 4007A Creating Effective Presentations Using Microsoft® Office PowerPoint® 2003
- 4008A Building Better Microsoft® Office Word 2003 Documents in Less Time

- 4009A Setting Up Projects for Success Using Microsoft® Office Project 2003
- 4010A E-Commerce Profitability: Online Merchandising Using Microsoft® Office FrontPage® 2003
- 4011A Microsoft Office Tips and Tricks

MBS Business Portal

- 8391A Business Portal 2.5 Installation and Configuration
- 8518A Business Portal Installation & Configuration in Microsoft Dynamics

Microsoft .NET Compact Framework

- 2556a Developing Mobile Applications Using the Microsoft .NET Compact Framework

Microsoft BizTalk Server

- 2954B First look: Microsoft BizTalk Server 2006 for Developers
- 2955B First Look: Microsoft BizTalk Server 2006 for IT Professionals

Microsoft CRM 3.0

- 8521A Microsoft CRM 3.0 Sales Management
- 8522A Microsoft CRM 3.0 Marketing Automation
- 8523A Microsoft CRM 3.0 Service Management
- 8524A Microsoft CRM 3.0 Service Scheduling
- 8525A Microsoft CRM 3.0 Customization
- 8526A Microsoft CRM 3.0 Installation and Configuration
- Microsoft CRM 3.0 Images
- Microsoft CRM 3.0 What's New

Microsoft Office

- 2015A Enabling Business Processes using XML, Smart Documents, and Smart Client Solutions within the Microsoft Office System
- 2052a Using Microsoft Visual Studio Tools for the Microsoft Office System
- 2081a Deploying Microsoft Office Live Communications Server2003

Microsoft Office 2003

- 2016a Bringing Data into Desktop Programs using the Microsoft Office 2003 Editions Research and Reference Technologies

Microsoft Operations Manager

- 2287A Managing Your Infrastructure Using Microsoft Operations Manager 2005
- 2550a Implementing Microsoft Operations Manager 2000

Microsoft Project

- 2732a Planning, Deploying, and Managing an Enterprise Project Management Solution

Microsoft Small Business Server

- 2395a Designing, Deploying, and Managing a Network Solution for the Small and Medium-sized Business

Microsoft Visual Studio .NET

- 2363a Getting Started with Microsoft .NET for COBOL Programmers

- 2364B What's New in Microsoft Visual Studio 2005 for Existing Visual Studio .NET Developers
- 2365A Designing an Application Migration Strategy to Microsoft .NET
- 2541A Core Data Access with Microsoft® Visual Studio® 2005
- 2541B Core Data Access with Microsoft Visual Studio 2005
- 2542A Advanced Data Access with Microsoft Visual Studio 2005
- 2543A Core Web Application Technologies with Microsoft® Visual Studio® 2005
- 2543B Core Web Application Technologies with Microsoft® Visual Studio® 2005
- 2544A Advanced Web Application Technologies with Microsoft Visual Studio 2005
- 2546A Core Windows Forms Technologies with Microsoft® Visual Studio® 2005
- 2546B Core Windows Forms Technologies with Microsoft® Visual Studio® 2005
- 2547A Advanced Windows Forms Technologies with Microsoft Visual Studio 2005
- 2548A Core Distributed Application Development with Microsoft® Visual Studio® 2005
- 2548B Core Distributed Application Development with Microsoft® Visual Studio® 2005
- 2549A Advanced Distributed Application Development with Microsoft Visual Studio 2005
- 2562A Getting Started with Microsoft Visual Studio 2005 for Visual Basic 6.0 Developers
- 2631A Optimizing the Software Development Lifecycle with Microsoft Visual Studio Team System
- 2717b Introduction to Microsoft .NET Development

Microsoft Windows Server 2003

- 2123a Jumpstart: Upgrading from Microsoft Windows NT 4.0 to Windows Server 2003
- 2199A Jumpstart: Active Directory Fundamentals
- 2207a Expert Track: Updating Systems Administrator and Systems Engineer Skills from Microsoft Windows 2000 to Windows Server 2003
- 2208b Updating Support Skills from Microsoft Windows NT 4.0 to Windows Server 2003
- 2209b Expert Track: Updating Systems Administrator Skills from Microsoft Windows 2000 to Windows Server 2003
- 2210b Expert Track: Updating Systems Engineer Skills from Microsoft Windows 2000 to Windows Server 2003
- 2273a Managing and Maintaining a Microsoft Windows Server 2003 Environment
- 2273B Managing and Maintaining a Microsoft Windows Server 2003 Environment
- 2274C Managing a Microsoft Windows Server 2003 Environment
- 2275C Maintaining A Microsoft Windows Server 2003 Environment
- 2276C Implementing a Microsoft Windows Server 2003 Network Infrastructure: Network Hosts
- 2277b Implementing, Managing, and Maintaining a Microsoft Windows Server 2003 Network Infrastructure: Network Services
- 2277C Implementing, Managing, and Maintaining a Microsoft Windows Server 2003 Network Infrastructure: Network Services
- 2278b Planning and Maintaining a Microsoft Windows Server 2003 Network Infrastructure

- 2279b Planning, Implementing, and Maintaining a Microsoft Windows Server 2003 Active Directory Infrastructure
- 2282a Designing a Microsoft Windows Server 2003 Active Directory and Network Infrastructure
- 2283b Migrating from Microsoft Windows NT 4.0 to Microsoft Windows Server 2003
- 2297a Planning, Implementing, Managing, and Maintaining a Microsoft Windows Server 2003 Environment for an MCSE on Windows 2000
- 2299a Managing and Maintaining a Microsoft Windows Server 2003 Environment for an MCSA on Windows 2000
- 2827A Deploying Microsoft Windows Rights Management Service
- 4356A Managing Branch Office Resources Using Microsoft Windows Server 2003 R2
- 4357A Managing Data Storage Using Microsoft Windows Server 2003 R2
- 4358A Deploying and Managing Active Directory Federation Services in Microsoft Windows Server 2003 R2
- 4360A Getting Started with Microsoft Windows Server 2003 R2
- 4361A First Look: Microsoft Windows Server 2003 R2 Hands-On Lab for IT Professionals

MSF & MOF

- 1737b Microsoft Operations Framework Essentials
- 1787b Microsoft Operations Framework Changing Quadrant
- 1846a Microsoft Solutions Framework Essentials

Office & Access Application Development

- 2657a Programming Microsoft® Access 2002

Office XP

- 2381B Planning Collaborative Solutions with Microsoft Office XP Technologies
- 2505a Deploying Microsoft Office XP

Security

- 2770B Microsoft® Security Guidance Training for Developers
- 2801C Microsoft Security Guidance Training I
- 2802B Microsoft Security Guidance Training II
- 2802C Microsoft Security Guidance Training II
- 2803A Microsoft Security Guidance Training III
- 2804A Microsoft Security Guidance Training IV
- 2806B Microsoft Security Guidance Training for Developers
- 2807A Microsoft Security Guidance Training for Developers II
- 2808A Microsoft® Security Guidance Training V
- 2810a Fundamentals of Network Security
- 2811a Applying Microsoft Security Guidance
- 2811B Applying Microsoft Security Guidance
- 2812A Applying Microsoft Security Guidance II
- 2813A Applying Microsoft® Security Guidance III
- 2820a Implementing and Administering Security in a Microsoft Windows 2000 Network
- 2821a Designing and Managing a Windows Public Key Infrastructure
- 2823B Implementing and Administering Security in a Microsoft Windows Server 2003 Network
- 2830a Designing Security for Microsoft Networks
- 2840a Implementing Security for Applications

- 2855A Managing Security Enhancements in Windows Server 2003 Service Pack 1 Security T-Prep(Trainer Preparation)

SharePoint Portal Server

- 2014b Customizing Microsoft SharePoint Products and Technologies 2003
- 8036A Designing Collaborative Applications with Microsoft SharePoint Server 2003

SQL Server

- 2030a Creating Reporting Solutions Using Microsoft SQL Server 2000 Reporting Services
- 2071b Querying Microsoft SQL Server 2000 with Transact-SQL
- 2072a Administering a Microsoft SQL Server 2000 Database
- 2073B Programming a Microsoft SQL Server 2000 Database
- 2074a Designing and Implementing OLAP Solutions Using Microsoft SQL Server 2000
- 2090a Modelling Business Requirements to Create a Database Using Microsoft Visual Studio .NET Enterprise Architect
- 2092A Populating a Data Warehouse with Microsoft SQL Server 2000 data Transformation Services
- 2093a Implementing Business Logic with MDX in Microsoft SQL Server 2000
- 2591a Implementing Replication Using Microsoft SQL Server 2000
- 2723a Microsoft SQL Server 2000 for Experienced Database Professionals
- 2733B Updating Your Database Administration Skills to Microsoft® SQL Server™ 2005
- 2734B Updating Your Database Development Skills to Microsoft® SQL Server™ 2005
- 2779A Implementing a Microsoft SQL Server 2005 Database
- 2780A Maintaining a Microsoft® SQL Server™ 2005 Database
- 2781A Designing Microsoft SQL Server 2005 Server-Side Solutions
- 2782A Designing Microsoft SQL Server 2005 Databases
- 2782A Designing Microsoft SQL Server 2005 Databases BETA
- 2783A Designing the Data Tier for Microsoft SQL Server 2005
- 2783B Designing the Data Tier for Microsoft SQL Server 2005
- 2786A Designing a Microsoft SQL Server 2005 Infrastructure
- 2786B Designing a Microsoft SQL Server 2005 Infrastructure
- 2787A Designing Security for Microsoft SQL Server 2005
- 2789A Administering and Automating Microsoft SQL Server 2005 Databases and Servers
- 2789B Administering and Automating Microsoft SQL Server 2005 Databases and Servers
- SQL Server 2005 Business Intelligence

Systems Management Server

- 2596B Managing Microsoft Systems Management Server 2003
- 2597B Planning and Deploying Microsoft Systems Management Server 2003

- 827b Administering Microsoft Systems Management Server 2.0
- 828b Deploying and Supporting Microsoft Systems Management Server 2.0

Technical Preparation

- Automated Setup
- Exchange 2003
- Quick Reference
- Virtual PC
- Windows Server 2003

Visual Basic Application Development

- 1013a Mastering Microsoft Visual Basic 6 Development
- 1017b Mastering Web Application Development Using Microsoft Visual InterDev 6
- 1303a Mastering Microsoft Visual Basic 6 Fundamentals
- 1587B Introduction to Programming with Microsoft Visual Basic 6
- 2559b Introduction to Visual Basic .NET Programming with Microsoft .NET
- 2571a Application Upgrade and Interoperability Using Visual Studio .NET(Visual Basic .NET)

Volume Licensing

- Volume Licensing Essentials
- Volume Licensing for Large Organizations
- Volume Licensing for Small and Medium Businesses

Web & E-Commerce Application Development

- 1905c Building XML-Based Web Applications
- 1913a Exchanging and Transforming Data Using XML and XSLT
- 2143a Deploying and Managing Host Integration Server 2000
- 2185a Deploying and Managing Microsoft Commerce Server 2000
- 2203a Deploying and Managing Microsoft Application Centre 2000
- 2300a Developing Secure Web Applications
- 2310b Developing Microsoft ASP .NET Web Applications Using Visual Studio .NET
- 2311A Advanced Web Application Development using Microsoft ASP.NET
- 2366A Developing High Performance and Scalable Web Applications using ASP.NET 1.1 and ADO.NET 1.1
- 2379a Developing and Deploying Microsoft BizTalk Server 2000 Solutions
- 3201B Developing Microsoft ASP.NET 2.0 Web Applications

Windows 2000

- 1560c Updating Support Skills from Microsoft Windows NT 4.0 to Microsoft Windows 2000
- 1561b Designing a Microsoft Windows 2000 Directory Services Infrastructure
- 1562b Designing a Windows 2000 Networking Services Infrastructure
- 1567b Pre-installing and Deploying Microsoft Windows 2000 Professional
- 1594b Installing and Configuring Microsoft Windows 2000 File, Print and Web Server

- 2028a Basic Administration of Microsoft Windows 2000
- 2062a Implementing Microsoft Meta-directory Services 2.2
- 2087a Implementing Microsoft Windows 2000 Clustering
- 2126b Managing a Microsoft Windows 2000 Network Environment
- 2150a Designing a Secure Microsoft Windows 2000 Network
- 2151b MS Windows 2000 Network & Operating Systems Essentials
- 2152c Implementing Microsoft® Windows® 2000 Professional and Server
- 2153b Implementing a Microsoft Windows 2000 Network Infrastructure
- 2154b Implementing and Administering Microsoft Windows 2000 Directory Services
- 2433a Visual Basic Script and Windows Script Host Essentials
- 2439a Scripting Microsoft Windows Management Instrumentation

Windows CE

- 2432A Developing Embedded Solutions for Microsoft Windows CE 3.0

Windows NT Server

- 803b Administering Microsoft Windows NT 4.0

Windows XP

- 2261B Supporting Users Running the Microsoft Windows XP Operating System
- 2262B Supporting Users Running Applications on a Microsoft Windows XP Operating System
- 2263a Exam Preparation for the MCDST Certification - Clinic
- 2264A Exam Preparation for the MCDST Certification Hands on Lab
- 2272C Implementing and Supporting Microsoft Windows XP Professional
- 2285B Installing, Configuring, and Administering Microsoft Windows XP Professional
- 2289A Deploying Business Desktops with Microsoft Windows XP and Microsoft Office 2003
- 2520a Deploying Microsoft Windows XP Professional
- 2851A Deploying and Administering Windows XP Service Pack 2
- 2853A Developing and Maintaining Applications on Windows XP Service Pack 2

Personal Development

Personal Development Portfolio

This is a selection of Personal Development Skills courses that we would tailor to reflect your company ethos to develop your team and provide them with tangible benefits that will contribute towards your business objectives.

The course outlines can be cut down to focus on particular aspects or they can be tailored to focus on particular topics that are most relevant to the delegates, which may therefore allow for additional practical time.

Titles listed in **purple** indicate the page number where the course contents are detailed in this directory.

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Written communication skills

Appraisal and Performance Review

Who would benefit?

This course is for anyone who appraises staff and wishes to improve their knowledge and skills in delivery.

Objective

Following this training course delegates will be able to manage the appraisal process. Understand how appraisal fits into the process of performance management. Use effective interpersonal skills during an appraisal. Set appropriate objectives. Prepare for an appraisal. Conduct an appraisal. Use coaching skills to facilitate learning in the workplace.

Content

- Key features of a performance management process
- The part Appraisal plays in a T&C Regulated environment
- Appraisal forms, system and documentation
- Competencies
- SMART Objectives
- Appraisal and its links to the business plan
- Preparing for and conducting effective appraisals
- Film 'Revelations'
- Skills practice with feedback
- The role of coaching – practice and feedback
- Handling performance problems – constructive criticism
- 360 degree appraisal

Duration

One day

Associated Courses

Emphasis on a different type of interviewing is given on the course 'Selection and Interviewing Techniques' for those who need to recruit as well as appraise. This course is also a useful though not essential pre-requisite for 'Coaching and Mentoring'.

Investment

Client site: £995 per group

Assertiveness Skills

Who would benefit?

All individuals wishing to develop a more assertive behavioural style in order to increase and enhance their effectiveness in the workplace. This course outline can be tailored for group or one-to-one training, to incorporate other subjects and /or focus on particular topics that are more of a priority to the delegate(s).

Objective

Assertiveness is concerned with exercising personal rights, without being aggressive or denying the rights of others. The aim of this course is to increase personal effectiveness in a variety of situations and to learn how to resolve conflicts in a direct and honest manner.

Content

- Rights and beliefs.
- Definitions of types of behaviour.
- Behaviour payoffs and prices.
- Identify your own behaviour.
- Managing expectations.
- Know what you want to achieve.
- Set SMART goals.
- Making and refusing requests.
- Broken record.
- Negative and positive enquiry.
- Negative and positive assertion
- Influencing styles and strategies.
- Barriers to communication.
- Questioning skills.
- Active listening skills.
- Managing difficult situations.
- Resolve current challenges.
- Get the right message across.
- Practice new skills.
- Personal Action Plan.

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Behaviour Styles and Conflict Resolution

Who would benefit?

Very few people are naturally good at conflict management. Conflict can actually be good since the purpose of conflict is to arrive at a resolution, however, the only way people can accomplish an effective solution is to get everything out and discuss it openly.

This programme will help delegates gain a better understanding of yourself and others in order to help in resolve conflict and developing rapport – both highly essential business skills.

This programme will be beneficial to all those wishing to understand and enhance personal interactions and develop productivity through building a greater rapport with others.

Objective

To understand the importance of developing good working relationships with others and be aware of the individual's behavioural style and appreciate how this impacts on others. To understand personal strengths and weaknesses when working with others, develop techniques to overcome communication problems and respond positively to others. To improve techniques of good client service when working with 'difficult' people, develop a positive attitude and change counterproductive habits, attitudes and behaviours that impact on work.

Content

- Understanding the key behavioural styles - what are they and where are they coming from?
- Behavioural mirrors and conflict.
- Understanding your own preferred behavioural style.
- Four-Quadrant Behavioural styles model.
- Handling conflict when dealing with difficult people - colleagues and clients.
- Developing effective interpersonal techniques to adapt and connect with others.

Duration

One day

Investment

Client site: £995 per group

Delegate comment

"The trainer was prepared to adapt the course to deal with the issues which were raised."

Budgeting Basics

Who would benefit?

Running a department without understanding the budget process is like driving a car without knowing how to steer. Every manager needs a basic understanding of how to plan, use and monitor adherence to a budget. Addressing the needs of your own budget process will help you support the financial processes and goals of your organization as a whole..

Objective

Non-financial managers will learn the concepts and techniques vital to the budget process, including forecasting revenue and expenses; choosing the best kind of budget strategy and progressively measuring the success of your plan through the use of variance reports.

Content

- Budgeting fundamentals
- Overview
- Cash, income and expenditure budgets
- Reviewing budgets
- Analysing budgets
- Justification and approval
- Operating budgets
- Operating budget basics
- Operating budget terminology
- Operating budget methods
- Manufacturing budgets
- Manufacturing budget basics
- Interpretation
- Variance, forecasts, and action plans
- Variance and forecasts
- Action plans
- Capital budgets
- Capital budget basics
- Discounted cash flow method

Duration

One day

Investment

Client site: £995 per group

Business Writing Skills

Who would benefit?

Individuals from all disciplines who are called on to communicate their ideas in written format.

Objective

Success in today's organisation is closely related to the ability to communicate ideas and messages effectively and succinctly. Poorly written correspondence can have disastrous results for your organisation and waste valuable time and resources.

By the end of this course, delegates will have developed the necessary skills to communicate ideas in a clear, concise and effective way. This course is highly practical to give delegates the opportunity to apply all the techniques covered.

Content

- Writing: fears and hopes
- Why is writing important
- The purpose of writing
- Fine tune your writing
- Four fundamentals: the why, who, when, how of writing
- Obstacle to avoid
- How to confuse
- Make your writing clearer
- Choose and use the right words
- Tone
- Most frequently misspelled words
- Grammatical rules
- What is correct
- Know your reader
- Writing for different readers
- The readability test
- Is your writing understood by the reader?
- Make notes and mind-mapping
- Brainstorming
- The writing plan
- How to get started
- Structure long and short paragraphs
- Categorisation
- Report writing: the ten parts
- Letter and memo writing
- Business letters and memos
- Formal vs. informal
- E-mail
- Personal action plan

Duration

One day

Investment

Client site: £995 per group

Chairing / Holding Meetings

Who would benefit?

Individuals who wish to develop skills to contribute to productive meetings.

Objective

By the end of the course, participants will understand and be able to apply the various processes and roles which produce effective meetings.

Content

- Experience of meetings.
- What works and what doesn't.
- Types of meetings.
- Roles in meetings.
- Types and purposes of meetings.
- Reasons for meeting/not meeting: how they become cost efficient.
- Roles/contributions .
- Range of roles:
 - chairing
 - procedural
 - contributor/participant, junior/learning.
- What they involve.
- What makes a successful meeting.
- Positive vs. negative outcomes.
- Behaviours:
 - constructive vs. destructive.
- Personalities:
 - recognise and handle positively
- Attention to practical aspects:
 - preparation
 - agenda
 - location and physical environment.
- Process:
 - managing and leading
 - agenda and group dynamics
 - avoiding conflict.
- Skills of influencing and contributing to discussion.
- Chair.
- Participants.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Coaching and Mentoring

Who would benefit?

Managers, supervisors and team leaders who need to coach staff to achieve higher standards of performance. The course will focus on building the skills and instilling confidence.

Objective

Following this workshop delegates will be able to understand the role of coach and mentor and be able to plan and run a coaching or mentoring session. Use the skills to improve their own sessions. Understand how their Myers Briggs Type Indicator profile affects coaching style and others preferences. Use thinking and learning styles to help plan coaching sessions. Use effective non-judgemental interpersonal skills during the coaching process.

Content

- Coaching v. mentoring: how they differ and when to use them.
- What makes an effective coach? – a competency model.
- Understand the process and its value.
- The coaching cycle and role of coach at each stage.
- GROW model.
- Interpersonal skills.
- A toolkit of coaching and problem solving techniques.
- Communication.
- Thinking and learning styles.
- A profile of you – Myers Briggs
- Linking coaching with other T&C initiatives.
- Giving effective feedback
- Action planning – how to implement a coaching culture.

Duration:

One day

Associated Courses

Since coaching is one outcome of an appraisal development plan an understanding of 'Appraisal and Performance Review' would be useful. If you want to find out how coaching can be used as one of a number of Leadership Styles then attend the 'Team Leadership' course.

Investment

Client site: £995 per group

Communication Skills

Who would benefit?

All personnel who are interested in developing their communication skills. This course will greatly enhance, both on a working and personal platform, relationships of those who practice and use it's discipline.

Objective

This course should be regarded as the cornerstone of building strategic business relationships with customers, clients and colleagues in the working environment. The course has been designed to enable those attending to communicate more effectively at all levels.

The prime objective is to give delegates a full understanding of how to gain powerful business advantage through effective communication.

Content

- Communication definitions.
- Communication barriers.
- Prejudgement and stereotyping.
- Communication in interviews.
- Good communication pointers.
- Non-verbal communication:
 - the importance
 - limitations
 - use more effectively.
- Behaviour:
 - assertive, aggressive, submissive
 - recognise and deal with.
- The value of assertiveness.
- Assertiveness.
- Visual, auditory and kinaesthetic communication.
- Questioning and listening skills.
- Identify, assess, evaluate.
- The importance of listening skills.
- Problem solving checklist.
- Barriers to good written communication.
- Developing effective writing skills.
- Using flipcharts and e-mail.
- Verbal communication:
 - people and situations.
 - Effective presentations.
 - Personal action plan.

Duration

One day

Investment

Client site: £995 per group

Customer Relationship Management for Brokers

Who would benefit?

Clients have holistic insurance needs and this programme considers the way in which you can attract, retain and expand business relationships with your clients. This programme will be beneficial to all those who are working with clients and need to retain and expand existing accounts

Objective

To define client relationship management (CRM) and effectively use probes to uncover and understand the importance of and meeting client's needs. To develop techniques to acquire business in combination.

Content

- Defining Client Relationship Management (CRM)
- CRM drivers
- Probing to understanding client needs
- Supporting the client
- Business in combination
- The human factor (behavioural styles)
- Building long-term relationships
- Managing client expectation and providing a value added service

Duration

One day

Investment

Client site: £995 per group

Delegate comment

"The best thing about this course was the interesting and interactive nature of the exercises and not having to listen for long periods."

Effective Business Meetings

Who would benefit?

Meetings are a fundamental tool in any successful business, however, all too frequently, both time and effort are wasted by calling and attending meetings, which are ill prepared, have no clear objective and where attendees fail to contribute in the decision making process.

This programme aims to assist in dealing with the barriers to the effectiveness of meetings and encourage best practices which ensure meetings are successful. The course is suitable for those running or attending meetings.

Objective

By the end of this course, delegates will be able to know how to plan and prepare meetings, know techniques in how an effective meeting should be run. They will know how to get the best practical benefits from a meeting, encourage participation and ensure that the minutes are effectively recorded.

Content

- Assist in establishing best practice at managing effective meetings
- Emphasise the key aspects of effective preparation
- Practice running meeting
- Record the minutes of the meeting
- Develop techniques for handling effective outcomes from meetings
- Develop techniques at dealing with difficulties and conflicts arising from meetings

Duration

One day

Investment

Client site: £995 per group

Finance for Non-Finance Managers

Who would benefit?

This course is designed for busy managers and those professionals who are responsible for financial matters without necessarily having a job title or qualifications to match and suits managers who need to know more about finance to improve their planning, costing and budgeting skills.

Objective

This course provides managers with an explanation of the financial reports and tools commonly used in business. Delegates will gain awareness and a basic understanding of the way finance affects their business objectives

Content

- Understanding the need for financial reports
- Budgeting, Costing & Planning
The purpose of plans.
Planning a budget, Monitoring and controlling a budget,
Plans against actuals, Variance analysis.
- An explanation of the month end and year end activities
Accruals, prepayments and reserves.
- Explanation of the differences between Statutory Accounts and Management Accounts.
- Understanding the Financial Reports
- Profit and Loss, Balance Sheets, Cash Flow Statement
- Explanation of the Key Financial Ratios
Profitability, Return on Capital Employed, Working Capital, Current Ratios, Debtors Ratio
- Finance in the Business
The business cycle, Planning, Target setting, Measurements, Action to correct problems
- A brief look at legal requirements.

Duration

One day

Investment

Client site: £995 per group

Handling Conflict

Who would benefit?

All individuals wishing to become more effective at recognising and handling conflict with others.

Objective

By the end of the course participants will understand the causes of conflict and recognise the types of conflict. They will understand how their own behaviour can contribute to conflict and through a variety of case studies and exercises, have a set of techniques for dealing with and resolving conflict.

Content

- Inter-personal conflict.
- Personal behaviour styles and impact of behaviour on others.
- Recognise personality types.
- Recognise potential conflict situations.
- Identify the causes of conflict: personality-based work-based work-cultural or non-work.
- Types of conflict.
- Communication models: transactional analysis Myers Briggs.
- Resolving conflict: moving to win/win situations.
- Techniques for handling conflict situations positively: assertiveness behavioural analysis tools effective listening/questioning building rapport communication techniques.
- Conflict within or between teams.
- Managing team processes to avoid conflict.
- Techniques for identifying and analyzing surfacing conflict.
- Techniques for dealing with conflict in the team.
- Focusing the team.
- Process/facilitation skills for team leader.

Duration

One day

Investment

Client site: £995 per group

Help Your Client Make a Buying Decision

Who would benefit?

This programme considers a practical needs-based approach to selling. It will help delegates develop an appropriate professional sales methodology that supports the client's buying decision.

Objective

The course emphasises the importance of focusing on customer needs, (needs based selling) during the 'sales interaction'. At the end of this course, the delegate will be able to experience practical sale scenarios (buyer – seller) through structured role plays; understand the benefit of a 'needs-based' sales approach; outline the key steps in the sales process by developing a structured sales methodology; plan and prepare for the 'sales call'; conduct the sales calls and use appropriate face to face skills in order to help customers make more informed buying decisions; develop effective probing techniques to uncover client needs

Content

- Work with the client to understand the client's situation (from their perspective) by using appropriate interpersonal skills (rapport - mirroring, matching and pacing)
- Review the implications of client concerns
- Open the sales call
- Use practical techniques to overcome customer indifference and objections – day 2
- Probing skills to establish fundamental client needs
- Effectively close the sales call and agree the way
- Support the client by ensuring a mutual understanding and agreement throughout the sales process

Duration

One day

Investment

Client site: £995 per group

Interpersonal Skills for Insurance Professionals

Who would benefit?

Anyone whose success in terms of their influence as a manager, professional or technical specialist is measured by their ability to build face to face relationships with others in their team, their colleagues and other work groups.

Objective

Following this workshop delegates will be able to accomplish goals and gain commitment and cooperation from others through use of improved interpersonal skills. Deal with breakdowns in communication by exploring the gap between intent and effect. Be able to use a six step assertiveness model choosing the most appropriate assertion to achieve win-win.

Content

- What do we mean by interpersonal skills and why are they important.
- Listening, questioning – the barriers to effectiveness.
- Non verbal communication and active listening.
- Power and influence.
- Discussion skills to allow a free flowing dialogue
- Clarifying and confirming to uncover information and check understanding.
- Constructive criticism to give critical feedback which promotes action.
- Managing differences to resolve potential conflict.
- Crediting to encourage good performance.
- The six steps of assertion from 'basic' to 'sanctions'.

Duration

One day

Associated Courses:

'Teambuilding and Team leading Skills' focuses on leadership style and the techniques of team management or leadership such as motivating the individuals, the team and achieving the task

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Magic Meetings

Who would benefit?

Meetings do require an outcome – something gets done, either for you, for the other person(s), or it is mutually beneficial for both. However it's not just what is achieved, it's also how you achieve it – how you approach and control the meeting; how you involve participants and influence or persuade others.

Objective

This course is designed to develop the skills of the chairperson.

Content

- Understand the factors that determine the necessity of a meeting.
- Appreciate the different types of meetings and the roles people should and could play.
- Understand the range of skills required to chair a meeting.
- Effective meeting preparation.
- Implement a process for running the meeting.
- Finish a meeting positively and manage the follow-up.
- Know own personal communication style and how to adjust to suit a meeting.
- Effective preparation to lead a meeting.
- Know the differences between assertive, aggressive and passive behaviours.
- Understand and practice the three steps to assertive behaviour to help control the meeting.
- Understand a range of influencing techniques to promote a successful outcome.
- Demonstrate enhanced listening skills.
- Deal confidently with a range of meeting participants (e.g. the Head Shakers, the Air Time Hogs and the Sid Silents).

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Managing: Appraisal Skills

Who would benefit?

This programme provides an overview and refresher for those involved in the appraisal interviewing process. It ensures that the most valuable asset in the business, people, are effectively appraised, motivated and developed.

Objective

This programme reviews a practical 'hands-on' approach to appraisal interviewing by examining the process pre, during and post appraisal. It examines the appraisal as part of a performance management system; the importance of clear and **SMART** objective setting; assessment – measuring performance levels and monitoring change; preparing for the interview; handling the interview (behavioural styles and ensuring rapport/ *Halo v Horns*/giving positive feedback, managing poor performance; motivating staff; recording results and planning the way forward.

Content

- Plan the appraisal review and use the available time effectively
- Consider appropriate room layouts
- Understand the importance of structuring the appraisal effectively
- Work with competency based interview check sheets
- Create a 'Dos and Don'ts' checklist for interviewing
- Considering evidence of performance by examining individuals' KPI's
- Effectively control the process by managing the interview
- Develop good probing techniques and question handling
- Understand which questions to ask and which to avoid!
- Develop effective observation and listening skills
- Summarise and provide feedback
- Appreciate the importance of note taking and record keeping

Duration

Half day

Note

For those new to interviewing it is recommended that you attend the Managing: Interviews half day programme first

Investment

Client site: £750 per group

Managing Assertively

Who would benefit?

Assertiveness is a key factor in effective management. By developing your assertiveness skills you will increase your confidence and self-esteem, and enhance your self-respect and the respect you gain from others.

Objective

This course will encourage you to learn and practice some of the skills and techniques of managing others assertively. You will discover strategies for dealing with difficult people and situations, and you will discover ways of making a positive impact on your team and your colleagues. Through a variety of self-assessment exercises, discussion and activities, you will find out how to put into practice what you have learnt.

Content

- The goals of assertive management.
- Principles of assertive behaviour.
- Your management style.
- Benefits of the assertive approach.
- Some assertiveness techniques.
- Assertive strategies for tricky situations.
- How to say 'No!'
- How to ask for what you want.
- Assertive statements to use in giving and receiving criticism.
- How to disagree.
- Dealing with difficult people.
- Handling aggression.
- Dealing with manipulative behaviour.
- Managing conflict.
- Communicating assertively.
- Verbal and non-verbal language.
- How to listen.
- Asking the right questions.
- Giving positive recognition.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Managing Change

Who would benefit?

All individuals who would benefit from gaining some practical tools to help them to manage change and transition.

Objective

At the end of the course you will be able to recognise and understand the effects of change on the individual, recognise and understand the effect of change on the organisation and develop strategies for managing the different phases of change.

Content

- Understanding change.
- The nature of change.
- Change and personality.
- The dos and don'ts of dealing with change.
- Identify your own response to change.
- Understand the three phases of transition.
- Managing the change process.
- Explore ways of helping others to deal with change.
- The three stages of resistance.
- Six strategies for dealing with resistance.
- Being a change agent.
- Checklist for managing stressful change.
- Moving forward.
- Seven step plan for developing a positive response to change.
- The REACH strategy.

Duration

One day

Investment

Client site: £995 per group

Managing Conflict

Who would benefit?

Conflict at work can reduce productivity and damage the morale of the whole organisation. This course will benefit those who wish to understand and manage conflict and anger in the workplace. You will learn how to handle conflict in order to create a healthy and productive working environment. Through a variety of self-assessment exercises, discussion and activities, you will find out how to put into practice what you have learnt.

Objective

At the end of the course you will recognise and deal effectively with conflict situations at work, be able to handle aggressive behaviour and understand negotiating styles.

Content

- The nature and causes of conflict.
- Your personal conflict style.
- Barriers to conflict resolution.
- Styles of conflict resolution.
- Getting conflict into the open.
- Dealing with aggression.
- Using assertive behaviour to influence situations.
- Strategies for reducing conflict.

Duration

One day

Investment

Client site: £995 per group

Managing: Develop Yourself and Others

Who would benefit?

This programme takes a closer look at managing ourselves and others. This is based on Action Centred Leadership (Prof. John Adair) examined management focus on team, task and individual.

Objective

At the end of the course you will understand behavioural traits and understand how to develop rapport in order to manage others.

Content

- Outline some of the key motivational theories and apply these in the work environment
- Understand the importance of setting appropriate objectives
- Understand the delegation process and be able to delegate where appropriate
- Personal development: the importance of developing self and others
- Recognise behavioural traits: understand the key behavioural styles in relation to avoiding conflict and establishing rapport
- Develop greater confidence in managing others

Duration

Half day

Note

Please consider any specific issues that you would like to discuss during the programme

Investment

Client site: £750 per group

Managing Difficult People / Situations

Who would benefit?

Challenging and difficult situations occur all too frequently with colleagues, customers and even our friends and family. These challenging, and often confrontational, situations can cause much anxiety and unhappiness and result in poor performance, stress, disappointment and frustration. This workshop takes the premise that each of us has all the skills and resources we need to build effective relationships and to deal with conflict productively in order to get so much more out of our professional lives.

Objective

The emphasis of the workshop will be placed on personal styles and preferences and how these can be used more effectively and with flexibility. To build and maintain productive relationships, even with 'difficult' people.

Content

- Understand the nature of conflict and why it occurs.
- Recognise and categorise a range of difficult or challenging interactions.
- Explain why people react the way they do when confronting difficult or conflict situations.
- Differentiate between different response styles and the appropriateness of their use.
- Balance and use effectively the relationship between verbal and non-verbal communication.
- Demonstrate how to maintain confidence and self-esteem in difficult situations.
- Demonstrate strategies for dealing with difficult or conflict situations.
- Explain the role of 'emotional bank balance' and the psychological contract.
- Demonstrate how to avoid antagonism, conflict and confrontation and neutralise negativity.
- Know how to say 'no' appropriately.
- Give/receive feedback appropriately.

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Delegate comment
"Covered everything and more! A very worthwhile and entertaining day."

Managing Disruptive Behaviour

Who would benefit?

This course is for those responsible for managing other people, where success depends upon their collective contribution to the business as this is a highly practical course offering a mix of theory, reflection and interactive sessions.

Objective

By the end of this course, delegates will be able to define and identify what constitutes disruptive behaviour as well as understanding the possible causes. They will have a greater appreciation of the skills and techniques that can be employed to deal with disruptive behaviour as well as being aware of the importance of taking responsibility for disruptive behaviour in the workplace.

Content

- Disruptive behaviour: encounters and impact; future interaction.
- Behaviour vs. personality.
- Behaviours I have difficulty handling-your approach to interpersonal problems and the implications of your personal style.
- Why people behave the way they do:
 - individual needs
 - environmental influences
 - standards and role models.
- Whose responsibility is disruptive behaviour?
- What sometimes prevents us from dealing with it effectively?
- Possible consequences of not addressing the problems.
- Recognise behaviour as disruptive.
- Identify, specify problems accurately.
- Dealing with disruptive behaviour.
- Face-to-face problem solving.
- Counselling.
- Preventing and eliminating disruptive behaviour.
- Motivation.
- Co-operation and trust.
- Communication.
- Involvement.
- Alleviate or eliminate.
- Disciplinary procedures.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Managing: Interviews

Who would benefit?

Interviewing is used for a number of reasons within business.

Recruitment is just one purpose, others include may include; selection, development, career counselling, disciplinary, succession planning, team selection and appraisal.

Objective

The purpose of this programme is to provide a generic programme that will underpin and support good interviewing techniques.

Content

- Consider workflow in order to,
- Understand the importance of interviewing effectively
- Understand the advantages and the disadvantages of the process
- List some of the pitfalls of the interview process
- Structure an effective interview session
- Develop probing skills and good question technique
- Understand the benefits and skills of effective listening
- Build rapport with interviewee in order to gain relevant information about their background and experiences
- Recognise behavioural traits
- Develop greater confidence in controlling the interview

Duration

Half day

Investment

Client site: £750 per group

Managing: Objective Setting

Who would benefit?

The purpose of setting goals and measuring performance is to get the optimum performance and contribute effectively to the attainment of our company's objectives and standards. Objective setting is key skill that, whilst not difficult to acquire, does need some training and a disciplined approach to ensure the optimum results.

Goal, or target setting is an important feature of performance management and both managers and staff need to understand how to set effective goals.

Objective

This programme will examine why it is essential to set effective goals; the importance of clear and SMART objective setting in order to achieve goals; different types of goals and objectives; features of objectives and goals; guidelines for setting effective objectives.

Content

- Plan and set effective goals
- Understand the importance of objective and goal setting
- List the key (different) types of objective
- Check the validity of an objective against SMART criteria
- Monitor the progress towards the objective
- Evaluate the results of effective goal setting

Duration

Half day

Investment

Client site: £750 per group

Managing: Tasks

Who would benefit?

This course is suitable for those who wish to improve their skills in managing and prioritising tasks.

Objective

The purpose of this programme is to support delegates in managing specific tasks within the workplace. It will focus on the practical selection and prioritisation of tasks in order to achieve effective results.

Content

- Consider workflow in order to,
- Identify and manage your tasks effectively (active/reactive tasks)
- Plan and set objectives using the SMART criteria
- Distinguish between urgent and important tasks
- Set appropriate SMART goals
- Examine and use some basic problem solving methodologies to assist with appropriate decision making

Duration

Half day

Note

For handling major tasks please consider undertaking a project management programme.

Investment

Client site: £750 per group

Managing: Teams

Who would benefit?

This programme would be particularly beneficial for those who are new to a team situation or for existing team where members who wish to analyse their role and contribution to the overall effectiveness of their team.

Objective

To identify the key elements present in a successful team, to learn about your own key strengths within the team and to demonstrate the benefits of synergy.

Content

- What makes an effective team?
- What are the key benefits of team working?
- What barriers exist to working effectively?
- Forming, Storming, Norming and Performing
- Analysing existing team relationships
- Building the Perfect Team
- Classic 'Belbin Team Roles'

Duration

Half day

Investment

Client site: £750 per group

Memory Techniques

Who would benefit?

Memory skills are integral to business; we must remember important facts, names, faces, dates and the content, at least in overview, of the meetings that we attend. Perhaps you want to hone your memory skills in order to pass an examination?

This programme will help you to develop techniques to improve your memory, and your ability to recall information, for all kinds of things. We will review some easy to learn practical techniques to help you become more effective in business, study and life.

The course is suitable for those wishing to improve their ability to memorise and recall information.

Objective

By the end of this course, you will be able to appreciate the importance of improving recall rather than memory per se; understand, in overview, the concept of holistic memory; be aware that there appears to be different types of memory and different techniques to access it; use a practical 'pegging' technique to recall lists – in any order; develop techniques to improve your success in exams and improve your ability to remember names and faces.

Content

- The perfect memory?
- Names, faces numbers and cases
- Why we forget - the Ebbinghaus curve of forgetting
- Playing for keeps - Long term v short term memory
- Association techniques
- Mnemonics
- Pegging and stacking technique
- Mind-mapping
- Names and faces

Duration

Half day

Investment

Client site: £750 per group

Negotiating for a Win/Win

Who would benefit?

The success of our negotiations and ultimately our personal and professional success will depend largely on how we approach and deal with the people we have to negotiate with.

This workshop presupposes that negotiation is about joint problem resolution - resolution that should be mutually acceptable to both parties. Conflict arises where people try to manipulate outcomes, get one over on the other side and approach negotiations in the spirit of a competitive sport!

Objective

The focus in this workshop is to help people to understand the other side better and to provide effective structures for planning and conducting negotiations.

Content

- Explain what a negotiation is and the alternatives to negotiating.
- Explain how to develop a Best Alternative to a Negotiated Agreement (BATNA).
- Explain the role and importance of values and criteria in negotiating with others.
- Demonstrate how to match and pace people's values and criteria.
- Identify and demonstrate five different frames or contexts that can greatly help the negotiation process.
- Demonstrate how to chunk up and down in order to establish the greater need that the parties have and establish common ground.
- Demonstrate the role of questioning and active listening in a negotiation.
- Prepare a structured checklist to help in a negotiation including the various stages of a negotiation: the role of adjournments
opening moves
preparation
making concessions
summarising
agreeing.
- Practice simulated negotiations.

Duration

One day

Minimum Numbers

Five delegates

Investment

Client site: £995 per group

Negotiation Skills

Who would benefit?

Effective negotiation skills are essential for managers, personnel, customer service representatives and project managers, indeed anyone involved in negotiations, both professional and personal.

Objective

This course will enable delegates to identify their current strengths and development needs in relation to their personal negotiation style. By the end of this course, delegates will be able to prepare, plan, conduct and review both formal and informal negotiations. The programme is highly practical offering a mix of theory, reflection and interactive sessions.

Content

- What is negotiation?
- What makes a successful negotiator?
- Negotiation experiences.
- Self-diagnostic questionnaire.
- The process of negotiation: preparation, establish the climate, explore needs, test understanding and summarising, negotiate your position and reaching agreement.
- Stages of negotiation: setting SMART objectives, choose your negotiating style, Blake and Mouton, setting your LIM strategy, influencing styles and strategies model, push/pull and moving away behaviours, negotiating win-win outcomes, specific closing techniques, thirteen ways to close a negotiation.
- Specific negotiation skills.
- Tips, tricks, tactics and gambits.
- Building magic rapport.
- Non-verbal communication.
- Matching .
- Signalling in negotiations.
- Understanding different indicators.
- Action plans to improve personal competencies.

Duration

One day

Minimum Numbers

Five delegates

Investment

Client site: £995 per group

Personal Effectiveness at Work

Who would benefit?

All individuals whose management and professional effectiveness at work is based on key elements of personal development and self management.

Objective

This course will help you to present a strong self-image and deal successfully with colleagues at work.

Content

- Working with others.
- Styles of behaviour.
- The principles and benefits of assertive behaviour.
- Dealing with requests.
- Coping with criticism.
- Maintaining effective behaviour in difficult situations.
- Managing stress and pressure.
- Preventing stress.
- Managing time.
- Taking control of your time.
- Identifying individual goals.
- Responding to priorities.
- Solving time management problems.
- Communicating effectively.
- Speaking, listening and responding.
- Using body language.
- Dealing with difficult situations.

Duration

One day

Investment

Client site: £995 per group

Personal Effectiveness Workshop

Who would benefit?

Part-qualified CII and others for whom CPD is important.

Objective

Following this workshop delegates will be able to understand how their learning needs can be met through CPD. Be able to list and work on their own needs - personal, professional, managerial and business. Learn in a way which best motivates them. Formulate an action plan with prioritised CPD. Focus on development needs that really matter in line with Company/Job competencies. Construct personal development plans which can be supported by ongoing coaching.

Content

- Self managed development – taking the initiative and achieving work-life balance.
- Managerial competencies model.
- Focus on your competencies and what you want and need to achieve.
- What can be achieved through power and influence?
- Responding to change and transitions.
- Individual preferences, Myers – Briggs Type Indicator.
- Preferred Learning Styles – Honey & Mumford.
- Personality – Occupational Personality Questionnaire & derived scales on Team Type, Leadership Style – expert system report.
- SWOT analysis.
- Force field analysis.
- Performance management systems and their use for providing learning needs.

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Personal Organisation / Time Management

Who would benefit?

Do you find that you are so busy doing urgent things that you do not have time for the important? This programme will enable delegates to review their personal organisation and processes in order to increase their personal effectiveness

Objective

To review how activities are currently managed and to develop techniques that allow effective prioritisation and management. Delegates will develop techniques that will help them review how they spend their time now, develop realistic plans to accomplish their goals, reduce the stress of poor organisation, focus on achieving results and know how to delegate effectively.

Content

- The nature of time and our perception of it
- Review of existing work flow
- Effective techniques to prioritise and organise your work
- identifying areas for potential improvement
- Focussing on SMART objectives
- Developing an improved personal organisation methodology
- Develop techniques that allow a better use of time
- Handling internal queries, paperwork and dealing with interruptions
- Distinguish between Urgent and Important tasks
- Active v Reactive tasks and prioritising workload effectively
- Delegation – working effectively with others

Note:

Prior to attending, the programme, you will need to complete a time log. The purpose of this is to review where major blocks of time are used

Duration

One day

Investment

Client site: £995 per group

Personal Presence

Who would benefit?

All individuals who would benefit from learning how to increase their levels of confidence and motivation.

Objective

By the end of the course, individuals will understand how to improve their personal presence having received feedback on their own personal style and strengths and weaknesses. Through a variety of personal questionnaires and exercises they will have a range of tools and techniques to enable them to achieve this and have the confidence and motivation to apply these in their work life.

Content

- Personal presence.
- What do you want to achieve, why and in which situations.
- Self-awareness.
- Personal motivation and values.
- Personality types and behavioural styles.
- Personal strengths and weaknesses.
- Your knowledge, skills and aptitudes.
- Understanding your communication style and how effective is it.
- Improving your personal presence.
- Assertiveness.
- Making an initial impact:
 - personal presentation
 - verbal communication
 - non verbal communication.
- Influencing skills.
- Group process and facilitation.
- Effective listening and questioning.
- Building rapport .
- Networking .
- Developing your skills.

Duration

One day

Investment

Client site: £995 per group

Positive Stress Management

Who would benefit?

Stress is a part of living and working in a highly pressurised and competitive environment. This course is designed for anyone who would benefit from learning how to identify and manage stress in the workplace.

Objective

You will learn strategies for dealing with stress and how to manage pressure in a positive way that will help you to reach and maintain a high level of performance. Through a variety of personal questionnaires and exercises you will find out how to put into practice what you have learnt.

Content

- Understanding stress.
- What stress is and what causes it.
- The effects of stress on mind and body.
- Recognising signs and symptoms.
- Identifying your own sources of pressure.
- Examining your response to stress.
- Stress and your personality.
- Managing stress.
- Using mental energy to manage pressure.
- Positive thinking.
- Relaxing and recharging.
- Focusing on goals and values.
- Preventing stress.
- Managing anger.
- Developing a stress-resilient personality.
- Preventing stress.
- Managing anger.
- Developing a stress-resilient personality.

Duration

One day

Investment

Client site: £995 per group

Practical Guide to Treating Customers Fairly

Overview

"Treating customers fairly (TCF) is central to the delivery of our retail regulatory agenda as well as being a key part of our move to more principles-based regulation." F.S.A. By the end of March 2008 firms are expected to have appropriate management information or measures in place to test whether they are treating their customers fairly; and by the end of December 2008 all firms are expected to be able to demonstrate to themselves and to the FSA that they are consistently treating their customers fairly.

Objective

This programme will provide a general overview for the requirements of treating customers fairly (TCF)

Content

- What is TCF and what is meant by fairness?
- The FSA and TCF
- What do you need to do to implement TCF?
- Two Frameworks:
- The product life-cycle
- Cultural framework
- TCF the Six TCF consumer outcomes
- Principles of good management information to enable good decisions
- The FSA deadlines...

Duration

Half day

Investment

Client site: £750 per group

Presentation Skills

who would benefit?

This course would benefit those making presentations for the first time.

Objective

A highly interactive day with practical exercises. At the end of the day delegates will feel confident to make their first successful presentation.

Content

- Good preparation is confidence key.
- Time to make a positive impact.
- Professional start.
- Average attention spans.
- Ways to convey information: questions examples analogies statistics body language tone and pitch of voice.
- Use of visual aids
- PowerPoint - an aid, not a tool: consistency, simplicity.
- Your audience: your aims their expectations.
- Brainstorming, mind-mapping.
- Presentation length.
- How much to include.
- What are you telling your audience and why?
- Introduction, middle and close.
- Delivery
- Practise, practise, practise.
- Start solidly.
- Tell them what you're going to tell them, tell them, and then tell them what you've told them.
- Talking to the whole audience.
- Awareness of self-movement, voice, posture.
- Using pauses.
- Love what you are doing and be enthusiastic.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Project Leadership

Who would benefit?

For those wishing to develop the skills and attributes of a project leader and to exercise greater understanding and control of the projects they are leading.

Objective

This course is designed for those new to leading project teams. It covers core disciplines of effective Project Leadership including leadership styles, listening and communication skills and methods motivating and influencing the team.

Content

- Skills/attributes of a project leader.
- Project Leadership Style Define and differentiate between the manager and leader; continuum of leadership styles – autocrat/abdicrat/democrat; self assessment; forces influencing leadership style; what's involved in effective leadership; assessment of leadership strengths.
- Listening skills Exercises to demonstrate how poor our listening is; putting aside biases and personal perceptions.
- Assertive communication skills Assertive/passive/aggressive behaviour; examining beliefs; verbal structure
- Motivating Your Project Team Motivation theories – Maslow / Herzberg / Vroom and McClelland. By examining these participants are challenged to assess what motivates their team members.
- Influencing skills Sources of power. Positional/empathetic/information; exercise in influencing; influencing action plan.

Duration

One day

Investment

Client site: £995 per group

Project Management

Who would benefit?

For those wishing to exercise greater understanding and control of the projects they are managing.

Objective

This course is designed for those new to the role of Project Manager. The course covers a comprehensive range of topics from the Project brief, to the Project Review.

Content

- What is a project? Distinguish between projects and the every day job. Identify project features and competencies required.
- The Role of Project Manager Be clear about the role and responsibilities project manager, identify how a project is structured and outlines briefly the people management skills required to move through the process.
- Project Brief and Project Initiation Delivered in the context of the organisation, including risk identification and issues; assumptions and constraints.
- The Power of Planning The benefits of planning; set a project goal; identify key activities; build a work breakdown structure; the Responsibility Assignment Matrix; allocate tasks; Gantt chart; PERT diagram
- Project Implementation Delivered in the context of the processes in place for the organisation – status reports; change control; stage boundaries; testing.
- Project Review Questions to be asked; learn from success and from failure.
- Problem solving Systematic problem solving approaches that involve effective brainstorming – tips for facilitators; evaluation of solutions

Duration

One day

Investment

Client site: £995 per group

PRINCE2 also available

Project Managing Effectively

Who would benefit?

Anyone wishing to exercise greater understanding and control of the projects they are managing.

Objective

This course focuses on the principles and skills of effective project management. Delegates learn the basic steps in the project planning process, to use manual project management tools to plan a project and to identify key management issues that impact project success, including the importance of teamwork and conflict resolution.

Content

Definition and Terminology

- Project management overview.
- Definitions and terminology.
- Phases of project management.
- The project life cycle.

Project Charter

- Project goals.
- Project stakeholders.
- Procedure for project change.
- Project risk assessment.
- Project development strategy.
- Project quality requirements.
- Project budget.

Work Breakdown Structure

- Create a WBS.
- WBS for planning and reporting.
- Test for completeness of WBS.
- Generating a WBS.

Organisational Structures and Project Impact

- Types of organisational structures.
- Managing projects across organisational boundaries.
- The effective project manager.
- Motivating project team members.

Cost Estimating

- Types of cost estimate methods.
- Knowing when to use a particular estimating technique.

Acquire and Develop your Team

- Components of a project team.
- An effective project team member.
- The tools of an effective team.

Construct and Analyse your Project Network

- Construct a network representation of project activities.
- Identify the critical path.
- Analyse the network and crash your schedule.

Continued:

- Use the critical path to plan and control project activities.

The Project Plan

- The purpose of the project plan.
- What constitutes a project plan?
- Estimate activity duration.
- Effort vs. duration.
- Five types of activity duration estimates.
- Different estimation techniques.

Monitor and Control Progress

- Establish the baseline schedule.
- Tracking methods.
- Collecting and recording actuals.
- Asking the right questions to get accurate answers.
- Analyse variance of actual data.
- Analyse slipping tasks.
- Corrective actions to put the project on track.

Project Closeout & Review

- Document and publicise results.
- Gain customer's acceptance.
- Meet all contractual obligations.
- Re-establish motivation and morale.
- Transfer lessons learned to future projects.
- Rewarding the participants.

Project Management Software

- Overview of project management software (i.e. MS Project).
- Using such software.
- Management issues of large and super-large projects.
- Project management tool.

Duration

Two days

Minimum Numbers

Two delegates

Investment

Client site: £1990 per group

Project Managing: Introduction

Who would benefit?

For those wishing to exercise greater understanding and control of the projects they are managing.

Objective

This course is designed for individuals new to Project Management. It covers concepts, terminology and the core disciplines of effective Project Management. At the end of the course delegates should be sufficiently confident to proceed with training in the use of Computer based Project Management tools.

Content

- What is a project?
- Project management defined.
- Project management problems encountered by delegates.
- Planning & preparation.
- Controlling change.
- Project structure.
- Organisational issues.
- Overseeing.
- The project board.
- Project breakdown.
- The project plan.
- Project stages/phases.
- Checklists.
- Project plan preparation.
- Estimating.
- Validation.
- Dependencies.
- Milestones.
- Risk identification and analysis.
- Exception planning.
- Resource allocation & management.
- Resource levelling.
- Project control and reporting.
- Recording progress.
- Configuration control.
- Change control.
- Quality.
- Project management tool.

Pre-requisites

As this course is intended as a primer for introduction to PC based tools, delegates should be familiar with Windows, basic word processing and spreadsheet usage.

Duration

One Day

Minimum Numbers

Two delegates

Investment

Client site: £995 per group

Project Teams

Who would benefit?

This is for those wishing to improve team-working creating positive rapport with those working on projects.

Objective

This course is designed to demonstrate improved team-working as it includes various teamwork exercises throughout the day.

Content

- What is a team?
Distinguish the differences between project teams and work teams. The context of teams within the project.
- Three Strands of Team Activity
Content, structure, process: key questions for working teams; ingredients for successful team-work.
- Stages of Team Development.
Tuckman.
- Team Communication Skills
Assessment, problem solving, different types of communication in a team.
- Creating Positive rapport.
Overcoming the barriers; ask, listen, give and get principle.
- Handling difficult situations.
Approaches to conflict; five steps to resolving difficult situations.

Duration

One day

Minimum Numbers

Six delegates

Investment

Client site: £995 per group

Delegate comment

"The trainer's style and delivery, kept our interest and a lot of interaction which worked really well."

Selection / Interviewing Techniques

Who would benefit?

This would be of benefit to those new to interviewing and those with basic skills wishing to review techniques.

Objective

Following this course delegates will be able to understand the concept of competencies and the benefits of a competency based approach to interviewing. Use job / person specifications for interviewing. Explain when best to use more sophisticated recruitment tools such as assessment centres and psychometric tests. Apply effective communication skills – listening, questioning and non-verbal communication. Plan and conduct an interview within the confines of current legislation.

Content

- Different selection techniques and their comparative effectiveness.
- Interviewing communication skills.
- The selection process.
- Competency-based interviewing.
- Using assessment centres.
- Psychometric testing.
- Current legislation.
- Practical interviewing.

Duration

One day

Suggested follow-on courses:

Some delegates – those with people reporting to them would find useful the course 'Appraisal and Performance Review' which covers a different style of interviewing, coaching and development.

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Supervisory Skills

Who would benefit?

This course will particularly benefit those who have recently been appointed to their first management or supervisory position.

Objective

Business, individual and team success comes from good management. This course addresses the fundamental aspects of people management, giving delegates a sound basis and methods for applying proven management practice. By the end of the course, delegates will understand the ideas, techniques and concepts of personal management skills.

Content

- What makes a great manager?
- Introducing leadership styles.

Effective communication

- What, why, who, when and how.
- Manage meetings/build rapport.
- Visual, auditory, kinaesthetic and non-verbal communication.
- Questioning/listening technique.
- Assertive, aggressive and submissive behaviour.

Building an Effective Team

- Team structures and types.
- Strategies to strengthen teams.

Motivation

- Motivational theories.
- Basic and higher needs.
- Relate goals / needs to motivators.
- De-motivation.
- Develop skills to motivate effectively.

Delegation

- What do you delegate?
- To whom should you delegate?
- Delegating for best results.

Time Management

- The most important resource.
- Importance of personal goals.
- Planning time and time stealers.

Decision Making

- Decision making styles and process.

Managing Disruptive Behaviour

- Behaviour vs. personality.
- Why people behave the way they do.
- Preventing and eliminating disruptive behaviour.

Duration

One day

Investment

Client site: £995 per group

Teambuilding / Team Leading

Who would benefit?

For managers and team leaders who lead formal and informal teams and who need to organise and monitor them for performance.

Objective

Following this course delegates will be able to determine their main leadership style and be able to adapt this to different situations. Apply techniques to achieve the task whilst developing appropriately both the team and individual team members. State the stage of development of their own team and make plans to make the team more effective. Motivate and delegate effectively. Deal with conflict and difficult situations. Deal with other teams appropriately. Be aware of the extent of their power and influence.

Content

- Managing v. leading
- Team leadership – assess and use your preferred management style.
- Creating a team, balancing roles, achieving tasks.
- Belbin team roles.
- Action centred leadership.
- Situational leadership.
- Assessing and monitoring performance.
- Leading through change.
- Using coaching to identify needs and develop individuals.
- Using interpersonal skills.
- Dealing with conflict.
- Motivation.
- Practical exercises where delegates demonstrate their leadership capability.

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Telephone Techniques

Who would benefit?

Those, including receptionists, administrators and secretarial staff, who needs to project a confident and professional image when dealing with people on the telephone.

Objective

The telephone is usually the initial point of contact within an organisation and it is how first impressions are gained. This course will provide delegates with the techniques required to enhance the personal and company image over the telephone.

Content

- The importance of a professional telephone technique.
- Why is telephone technique so important?
- Why do customers do business with us?
- First impressions
- Moments of truth.
- Essential telephone skills.
- Advantages and disadvantages of using the telephone.
- What does the caller expect?
- Voice, tone and body language.
- Impact of the voice.
- Positive mental attitude.
- Positive phraseology.
- Best practices.
- Call response time.
- Transfer of calls.
- Keeping the caller informed.
- Taking telephone messages.
- Communication skills.
- Questioning skills.
- The art of listening.
- Making notes.
- Handling difficult telephone situations.
- Why do we lose control of a call?
- Awkward customers.
- Handling a complaint.

Duration

One day

Minimum Numbers

Four delegates

Investment

Client site: £995 per group

Time and Priority Management

Who would benefit

Individuals who have the responsibility for controlling or organising their own schedules and prioritising their workload.

Objective

This course aims to improve our effective use of time. By the end of this course, delegates will understand the concepts of time management and the factors affecting their time. They will learn the necessary skills for achieving their key tasks and business objectives

Content

- What is time and how do I use it?
- Time wastage, time log, job analysis.
- Procrastination vs. motivation.
- Maslow: hierarchy of needs.
- Encouraging motivation.
- The importance of personal goals.
- Accomplishing goals.
- Personal action plan.
- Planning time and prioritisation.
- Eisenhower grid.
- Daily planning ritual.
- Planning tools.
- Energy cycle.
- Time stealers: meetings, telephone, involved in too much, unfinished tasks, drop-in visitors, too much routine work, paper, reading
- Delegation.
- Distribution of responsibility.
- Priorities and communication.
- Indecision and crises.
- Saying 'No!'
- Self-discipline.
- Personal disorganisation.
- Your workplace and your desk.
- The in and out-trays.
- The desk file system.
- Performing under pressure.
- Identifying stressors.
- Awareness of stress signals.
- Strategies for harnessing stress positively.
- Thirty ways to make more time.
- Preparation and organisation.
- Dealing with interruptions.
- Meeting management.
- Dealing with the telephone.
- Office systems.

Duration

One day

Investment

Client site: £995 per group

Time Management for Managers

Who would benefit?

This course is for those who have recently been or about to be appointed to a management position, or for those wishing to develop their management potential. You will learn some of the skills of managing and motivating others and will gain confidence in your ability to manage individuals and achieve organisational goals. Through a variety of self-assessment exercises, discussion and activities, you will find out how to put into practice what you have learnt.

Objective

By the end of the course you will understand and be able to apply management principles, identify how actions and management styles influence performance and understand and be able to practice interpersonal skills in a managerial context.

Content

- Your management style.
- Key qualities of a successful manager.
- How to manage your team.
- Different management styles.
- Developing your team.
- What makes an effective team?
- Stages of team development.
- Understand team roles.
- Deal with problems within the team.
- Managing time.
- Take control of your time.
- Responding to priorities.
- Solving time management problems.
- Making and refusing requests.
- The art of motivation.
- What motivates you and your team?
- How to get the best out of people.
- Giving criticism.
- Giving praise.
- The art of delegation.
- Achieve results through your team.
- Overcoming barriers to delegation.

Duration

One day

Investment

Client site: £995 per group

Why Are You Shouting At Me?

Who would benefit?

This workshop is designed to help delegates deal with confrontational client situations. This course will teach you ways of communicating effectively with your teams, colleagues and managers.

Objectives

You will gain enhanced confidence in your ability to manage and control confrontational situations through understanding and influential communication.

Content

- Why people act the way they do.
- Understand we are emotional beings.
- How customers react to change.
- The conflict behaviour model.
- What happens next?
- Our survival mechanism.
- Turn the situation around.
- Three stages of conflict.
- Changing our state – cool down.
- Breaking the trance.
- Move on/get on.
- The traps we can fall into.
- Competitiveness.
- Assumptions.
- Failing to read the signs.
- Three steps to control.
- Calming, communicating and controlling stages.
- Communication skills.
- Different types of questions.
- Columbo technique.
- Yes sets.
- Summarise, paraphrase and listen.
- 55% rule.
- Matching and mirroring.
- Repetition and reframing.
- Deal with conflict on the telephone.
- Saying 'No!'
- Personal space and room layout.
- Manage conflict:
 - analyse things that help/hinder.
 - Personal safety.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Working with Others

Who would benefit?

This course will teach you ways of communicating effectively with your teams, co-workers and managers. Through a mixture of self-assessment, discussion and activities, you will discover some new ideas about communication reinforce some established ideas and learn how to put them into practice.

Objective

You will gain enhanced confidence in your ability to form productive working relationships through clear and influential communication.

Content

- Why communication goes wrong.
- Barriers and misunderstandings.
- Using transactional analysis.
- Three ego states.
- Crossed wires.
- Ways of putting it right.
- Understanding people's behaviour.
- Styles of behaviour.
- Developing an appropriate style.
- How to get the message across.
- Words and body language.
- Influencing and persuading.
- Your personal style.
- The two P's of persuasion.
- Two techniques of NLP (Neuro-Linguistic Programming).
- Seven factors that affect building rapport.
- The importance of listening.
- Ten tips for listening.
- Asking the right questions.
- Protecting your personal style.
- Your values and motivation.
- Establishing goals.
- Using emotional intelligence.
- Applying skills.
- Choosing effective feelings and behaviour.

Duration

One day

Minimum Numbers

Three delegates

Investment

Client site: £995 per group

Writing Project Reports

Who would benefit?

This is for those looking to express themselves clearly when writing project reports. The principles of this course may be applied to the production of reports in general.

Objective

The course is delivered through the production of example reports by the participants. These may be work related or on other subjects and are to provide reinforcement of the benefits of following the guidelines set out in this course.

Content

- How the intended message can get distorted or misinterpreted through ineffective writing
- The Fog index.
- Three components of report writing.
- Content, structure and style.
- Identify your content.
- Define, gather, select, group and order.
- Structure your report.
- Review your style.
- The principles of clear writing.

Duration

Half day

Investment

Client site: £750 per group

Delegate comment

"The course was tailored to meet our specific needs as we were in a small group and the course was held in our own offices. We could discuss our daily concerns with the trainer and were offered workable solutions."

Forum Drama

One of our new associates is a group of theatre and drama practitioners, artists and specialist consultants, all experienced in working in groups from business and the community, to explore issues, find solutions and allow group members to own the outcomes of the sessions.

They use the powerful interactive techniques of forum drama. They create and facilitate interactive workshops enabling participants to:

- Explore issues
- Experiment with change
- Develop and refine appropriate solutions and strategies
- Create and test interventions.

They also offer a range of off-the-shelf workshops addressing issues of general concern including:

- Exploring assertiveness (see next column)
- Bullying and harassment at work
- Diversity awareness

In addition, they offer highly tailored workshops to match the specific department/company requirements and ethos.

Assertiveness Interactive Forum Theatre Workshop

The workshop presents and explores a range of situations and stories in a relaxed and non-threatening atmosphere using the techniques of forum theatre.

Objective

To increase personal effectiveness and enable participants to be assertive without being aggressive. To enable participants to resolve conflict in a direct and honest way and develop emotional intelligence. Participants have the opportunity to identify situations they would like to work on with colleagues.

Content

- Identifying types of behaviour
- Exploring rights and beliefs and how these impact on behaviour
- Introducing and using a six step approach to assertive communication and interaction
- Identifying and practising appropriate skills and strategies
- Sharing strategies and ideals
- Body language
- Listening skills
- Appropriate language

Duration

Half or whole day

Minimum Numbers

Ten delegates

Investment

POA

Senior Management Training

Leading, Inspiring, Unlocking and Empowering People

Who would benefit?

Senior delegates with some experience of managing, who want to explore their leadership skills, qualities and attitudes, and to enhance their repertoire of styles and techniques. (Some pre-programme reading is recommended, and an optional element of this programme is the application of a 360-degree feedback instrument, tailored to the delegate or the organisation.)

Objective

By the end of the programme, you will be able to specify how you could apply three new approaches to leading people, to achieve substantial, measurable benefits.

Content

- The differences between management and leadership
- Modern thinking and research about leadership and motivation
- Developing a 'trust account' with each of your people
- Transactional and transformational leadership – your views and some case studies
- Deciding what you think good leadership is
- Analysing your personal style – using behavioural questionnaires, psychometric instruments or 360-degree feedback received
- Learning from leading exercises, and from receiving feedback from fellow delegates
- Determining and committing to ways to inspire people, to unlock their potential, and to empower them, to make things happen
- Practising inspirational coaching
- Preparing to balance attention to both people and processes when acting as a change agent
- Planning to create a culture of clear communication, trustful delegation, empowerment, and commitment to challenging goals

Duration

One day intensive programme that can be extended and deepened

Investment

Client site: £1,350 per group

Managing for Higher Performance

Who would benefit?

Senior delegates with experience of managing and want to explore their skills in achieving high performance, and to enhance their repertoire of styles and techniques. (Pre-programme reading is recommended, and an optional element of this programme is the application of a 360-degree feedback instrument, tailored to the delegate or organisation.)

Objective

By the end of the programme, you will be able to specify how you could apply three new approaches to achieving ever higher performance, to achieve substantial, measurable benefits.

Content

- Modern thinking about management
- Behaviours are you buying and selling?
- Sustaining peak performance
- Deciding what you think good management is
- Analysing your personal style
- Learning from managing exercises designed to stretch people's performance, and from receiving feedback from fellow delegates
- Modern thinking and research about intrinsic motivation, extrinsic rewards and individual performance, management and teams, and wider factors affecting organisational performance
- Practising approaches to appraisal and coaching to develop people's confidence, commitment and ability to deliver ever higher performance
- Preparing to balance attention to being a manager, coach and player
- Planning to create a culture of high performance expectations and delivery

Duration

One day intensive programme that can be extended and deepened

Investment

Client site: £1,350 per group

Presenting Personally, Powerfully and Profitably

Who would benefit?

Senior delegates who want and need to enhance their presentation skills, confidence and comfort with audiences. (Some pre-programme is required, and each delegate will be expected to make 3 brief presentations covering at least 2 topics – hopefully related to the needs of their organisation - and using at least 2 different media or styles.)

Objective

The programme will be conducted sensitively and in ways which encourage delegates to feel comfortable in experimenting with different approaches. By the end of the programme, you will be able to specify how you could apply three new approaches to your presentations, to achieve substantial, measurable benefits.

Content

Presentation Practice No 1

- Swift feedback from the audience of fellow delegates about what they liked about the presentation
- Exploration of issues arising – e.g. balancing the objectives of the presentation with the needs and expectations of the audience and the time available, structuring presentations, holding people's attention and generating interest, the pace and language used, different approaches for different purposes such as informing or persuading etc

Presentation Practice No 2

- Deeper feedback from the audience of fellow delegates about what they liked and their suggestions for developing or refining the presentation

Continued:

- Further exploration of issues arising – e.g. the value of using your existing strengths, encouraging questions, actively engaging the audience, using different media according to the situation, highlighting the key messages, tips for preparation of the presentation, audience, venue etc, the pros and cons of written notes, flipcharts, PowerPoint, standing v sitting with the audience, using stories etc, using techniques to develop personal confidence and respect for the audience etc

Presentation Practice No 3

- Extended feedback from the audience of fellow delegates about the presentation and how it might be made even more powerful and profitable
- Further exploration of issues arising – e.g. managing interruptions and time constraints/reductions, thinking pitch/promise/price/positioning, promoting your presence etc
- Planning your next – or next opportunity for a – personal, powerful and profitable presentation

Duration

One day intensive programme that can be extended and deepened

Investment

Client site: £1,350 per group

Strategic Thinking and Planning

Who would benefit?

Senior delegates with some experience of planning, and leading or taking part in projects, who want to enhance their thinking about wider strategic approaches. (Some pre-programme reading is recommended, and, where possible, delegates are encouraged to bring along real-life examples of their – or their organisation's - involvement in strategic thinking and planning.)

Objective

By the end of the programme, you will be able to specify how you could apply three new approaches to strategic thinking and planning to some past, present or future business issues, to achieve substantial, measurable benefits.

Content

Introduction

- What is strategy?
- How does it relate to vision, mission etc?
- How does it relate to clarity about what business we are in?
- The power and use of frameworks such as balanced business scorecard, EFQM, systems thinking, game theory, cascades, projects etc
- The need for communication and buy-in
- Brief exploration of some appropriate case studies
- The 'PIPE' Process – Planning, Implementation, Pursuit, Evaluation stages

Planning

- Analysing the organisation and its aims, stakeholders, customers, competencies, degrees of internal integration and external adaptation, and triggers and patterns of change
- Deciding gaps to be closed, start or end point approaches, 'in-out' or 'out-in' products and attitudes, risk-return preferences, and relative focus on systems or people

Implementation

- Consulting and communicating, and, where necessary, negotiating, with stakeholders
- Agreeing and aligning targets, measures and resources
- Launching initiatives, and determining criteria for tactical decisions

Pursuit

- Leading and managing plans, and modelling the desired changes
- Resolving problems encountered, using standard and innovative approaches, and managing necessary trade-offs
- Handling forces pushing strategies off course, and resistance
- Maintaining initiatives

Evaluation

- Four purposes of evaluation
- Involving stakeholders
- Taking action
- Learning for next time

Duration

One day intensive programme that can be extended and deepened

Investment

Client site: £1,350 per group

Teambuilding Horizontal and Vertical

Who would benefit?

Senior delegates with some experience of team-working, who want to enhance their repertoire of styles and techniques for teambuilding. (Some pre-programme reading is recommended, and an optional element of this programme is the application of a 360-degree feedback instrument, tailored to the delegate or the organisation.) This programme may be of particular benefit to whole teams able to find the time together to work on progressing some real-life issues or tasks.

Objective

By the end of the programme, you will be able to specify how you could apply three new approaches to teambuilding – with your staff, peers and more senior managers - to achieve substantial, measurable benefits. Whole teams will be able to point to measurable progress on the real-life issue or task they brought along.

Content

- Culturally - What sort of team do you want?
- Physically – How does what sort of team you have (manager and staff, amongst peers, project, vertical with your manager and other senior managers, virtual, remote) affect teambuilding?
- Practising building teams with fellow delegates
- Understanding the impact of dynamics and the emergence of roles in teambuilding
- Developing team identity and commitment to goals
- Generating good communication and openness in teams
- Determining norms and boundaries in teambuilding
- Handling disagreement and conflict in teams
- Practising giving feedback and support to team members
- Preparing to balance the need for doing, thinking and caring in teams
- Planning to create an effective and efficient team

Duration

One day intensive programme that can be extended and deepened

Investment

Client site: £1,350 per group

Wellness at Work

Lecture Modules and Workshops in Association with Equilibrium Solutions

In today's rapidly changing times, the need for optimum energy, emotional balance and mental clarity is of paramount importance. Wellness at Work is a highly effective programme of workshops and seminars that has been successfully running in a number of organisations for more than a decade. The programme uses a combination of scientific theory and practical application to demonstrate and teach techniques that can be applied both at work and at home.

The following modules are offered by Dr Nerina Ramlakhan. Former founder of Corporate Wellbeing programmes at BUPA, Nerina established her own practice, Equilibrium Solutions, in April 2000. Her delivery style is lively, academic (scientific), challenging and interactive. She has a particular interest in Physiology, Philosophy, Organisational and Sports Psychology. Her seminars and coaching programmes offer models and insights drawn from these areas as well as from the personal experience of having worked with thousands of business professionals over the past ten years.

The organisations that she has worked with include: HISCOX, AMLIN PLC, Faraday Group Services Ltd, Goldman Sachs, Merrill Lynch, STATOIL, PriceWaterhouseCoopers, GMTV, Securities and Futures Authority, Bank of England, Freshfields, Lovells, CMS Cameron McKenna, HSBC Investment and several police forces throughout the country.

Are you Sitting Comfortably?

'Musculoskeletal symptoms – typically upper and lower back problems – are the greatest cause of occupational ill-health and sickness absence'.

'The way you sit affects the way you think'.

This highly practical seminar will give valuable insights into the principles of optimal body posture and will cover the following areas:

- Are you sitting comfortably? A diagnostic for checking your own posture;
- Exploring the link between body posture and cognitive performance;
- Practical techniques for improving posture and enhancing work performance and energy management;
- Posture, body language and the power of influence;
- Practical desk-based techniques for alleviating neck, shoulder and back problems.

Creating Optimum Sleep

- An introduction to the physiology of sleep, circadian rhythms and energy recovery.
- Sleep as a mechanism for defusing stress and pressure;
- Shift work and sleep patterns; the implications for energy recovery,
- Impact of today's world (technology) on sleep efficiency and patterns of sleep disruption.
- How your time management can affect your sleep.
- The Optimal Sleep Toolkit: Practical techniques for optimising sleep quality.

Creating Optimal Learning

This seminar is particularly helpful for those who are studying part-time and preparing for exams. The focus of this two hour seminar is on creating the optimum conditions for learning and success.

The following areas are covered:

- The physiology of Optimal Learning; the Ideal Performance State;
- Managing the work-study interface;
- Sleep and learning;
- Cognitive techniques for creating the best outcome; visualisation, planning and anxiety management;
- The essential principles of 'study hygiene'

Eating for Peak Performance

'Inadequate nutrition may be one of the most significant factors contributing to poor performance and burnout in today's organisations.'

I base this statement on consultations with tens of thousands of employees in the past decade or so. Consider the following:

- how many cups of tea/coffee or cans of coke/red bull do you need to get you through the day?
- do you suffer from energy swings during the day?
- do you regularly crave chocolates and junk food?
- do you struggle to find the energy to do the things you enjoy?
- do you have problems sleeping?
- do you have problems concentrating at work and in meetings, particularly mid-afternoon?
- do you have little or no energy outside work?

All or many of these can be related to poor nutritional habits. This seminar covers the what, how and when of healthy eating to achieve maximum performance both at work and at home. The session is particularly focused on creating healthy, sustainable eating habits that are effective and practical for those working in high-pressure jobs and working long hours. The session is also tailored for those working shifts, with specific advice given for balancing eating patterns with maintaining alertness and concentration levels for the job.

Harnessing Creativity

It is not enough to have a good mind. The main thing is to know how to use it. DESCARTES

For many of us working in today's organisations, time pressures and work demands can force us to over-rely on our technical or logical left brain, often at the expense of creative, innovative right brain functions. We then tend to get 'stuck', feeling unable to solve problems or find creative solutions to everyday problems. This seminar deals with practical techniques for tapping into creativity and using the whole brain for problem-solving, whether at work or home. It is particularly useful for those who have particularly technical jobs and are seeking more innovative ways of viewing and solving problems. It is also useful for those who are trying to get more out of their creative hobbies.

Pre-seminar exercise: Before you attend this seminar please come prepared with a question in mind: What area(s) of my life could be enhanced by being more creative, and how?

Leading with Energy

In today's fast-paced and competitive world, the challenge for leaders is to maintain a consistently high level of performance at no cost to personal health, relationships and energy levels. In this one-day workshop, leaders will learn how to build their resilience and optimise their energy on every level - physical, mental, emotional and spiritual.

Managing Conflict

In today's organisation, the competitive advantage may lie in building cohesive relationships and teams.

Furthermore, man is a social animal and our morale and productivity are largely influenced by the quality of our relationships. This seminar examines the factors which create conflict in the workplace and offers practical solutions for resolving difficulties and enhancing performance.

The following will be covered:

- The anatomy of conflict
- Breaking the cycle of conflict;
- Shifting perspective; changing attitudes and behaviours;
- Venting constructively;
- Creating positive outcomes.

Manager's comment

"I was looking for a motivational speaker who could inspire our staff to embrace life and revive their enthusiasm. 4D Group conducted a very professional survey of the surroundings and work environment. The resulting programme, Optimum Wellness at Work delivered a clear, relevant and interactive presentation that was perfect for our needs and the staff were most impressed with her attitudes, beliefs and commitment to a holistic lifestyle."

Managing the Pace

Pressure is something we all live with and can be a healthy and normal part of life. This half to one day workshop for managers and their teams will introduce techniques which will help delegates to manage pressure and stress by increasing **physical and mental resilience**.

Key objectives:

- What is and isn't stress? What are healthy levels of pressure?
- Understanding the 'pressure barometer' - enhancing personal awareness, self-diagnosis and spotting early signs of stress in others, recognising when stress becomes 'medical';

Introducing a practical toolkit for **building resilience** including:

1. **Cognitive skills (developing Mind Power)** – introducing key mind power skills that can be used on a regular basis to create a healthier and more positive outlook (including managing negative/positive emotions such as fear, guilt and worry; limiting beliefs; your relationship with 'control'; support strategies; your relationship with time).
2. **Life-skills** - increasing energy and wellness through exercise, healthy and practical eating habits, optimising sleep quality and power napping, relaxation and focusing techniques for work and home, creating healthy work/life balance;

Power of Visualisation

Whatever the mind can conceive and believe, it can achieve.

We all know how to visualise but often we do so to create a negative outcome. For example, you might be dreading giving a presentation or sitting an exam and then end up with exactly the outcome you were trying to avoid.

This workshop will demonstrate the essential principles of positive visualisation and how to attract the outcome that you really want – whether at work, home or in your relationships. The following areas will be covered:

- how and why does visualisation work?
- how to set the focus for your visualisation; starting with the end in mind
- how to visualise positively
- how to create powerful and effective images that will create the right results
- how to become aware of negative visualisation.

Pre-seminar exercise: Think of a situation in which you are seeking to create a positive outcome (work or home-related). Have you been in this situation before? What outcome have you usually had? What would be your ideal outcome?

All of the above are available in one day workshops, half day workshops or hourly coaching sessions.

Preventing Burn-Out for Parents

To cover the following areas:

- Recognising when you are moving away from equilibrium – the burnout spiral.
- Managing the work/home interface and creating healthy boundaries;
- Creating the healthy mindset for being a working parent – managing guilt and perfectionism.
- The essential self-care rituals for working parents.

Redressing the Balance

This seminar explores the Wheel of Life and looks at how each area of your life – work, home, social, financial, hobbies – relates to every other area. This seminar is particularly useful for those who are seeking to improve work performance and enjoyment without compromising balance in other areas of their lives. The following will be covered:

- Work/home balance – what is healthy and how can you create sustainable boundaries?
- Nourishment - what drives and fuels your performance at work? Can you perform better with less effort?
- Practical techniques for 'freeing up' energy for other life domains.

Stress and the Immune System

- Have many days have you been off work sick in the past year?
- How many of these sick days have been due to minor coughs, colds or flu-type symptoms?
- How many colds have you had this year?
- How many times have you struggled to work with a cough or cold because you can't afford to take time off?
- How many times have you got ill as soon as you take a break?

Statistics from the Chartered Institute of Personnel and Development indicate that the average UK employee takes 8-10 days off work per year. More than 50% of this is likely to be attributable to minor ailments such as colds,

Wellness at Work

headaches, IBS and other stomach disorders. This is an underestimate of the problem; the statistics do not account for the loss of work productivity if an individual is at work but performing sub-optimally.

In this seminar, the link between how one reacts to stress and the immune system will be explored. Attendees will learn practical techniques for rebalancing the immune system so that they are able to perform at their best not just at work but in life in general.

Stress and your Energy Levels

To cover the following areas:

- The link between, stress, energy management and performance;
- The energy continuum: from optimal energy to burnout;
- The signs and symptoms of individual and organisational fatigue;
- The key principles of energy and time management;
- recognising where you lose energy and how this impacts on work focus and performance;
- Energy and creativity;
- Synchronising your work patterns with your energy cycle.
- An introduction to practical techniques for optimal energy management.

Stress and your Personality

The pace of today's life is such that many of us find ourselves constantly driven to perform at a consistently high level, both at work and at home. This seminar explores the relationship between personality and how we perform. Particular emphasis is placed on the following:

- Perfectionism; a good or bad thing? Recognising when trying too hard undermines performance;
- A self-assessment questionnaire to determine your personality type;
- Practical Life skills for balancing out your personality;
- Cognitive techniques for improving focus, clarity and time management.

Investment

One day workshop	£1,400
Half day workshop	£900
Hourly rate	£300
Coaching programmes	£300 per session
Telephone consultations	£150 per one hour session

Manager's comment

"We thoroughly enjoyed the delivery and I strongly recommend Nerina for staff motivation and personal and professional development programmes."

Manager's comment

*"Dr Nerina Ramlakhan is inspiring!
It is my responsibility to ensure that operational officers are effectively equipped to deal with the pressures and challenges that will be encountered. Having witnessed a previous presentation by Nerina I was confident that her knowledge and experiences would meet the needs of my students.
I was not disappointed.
I have absolute admiration for Nerina and would not hesitate in recommending that people take the opportunity to listen to her presentations."*

First Aid / Health and Safety Portfolio

4D Group has an association with an independent company that offers bespoke training that ensures competence and compliance with current Health and Safety regulations offering training solutions in a cost effective way to stay within the law, protecting both the company and its employees.

As members of RoSPA and IOSH, their trainers are constantly up to date with the latest developments in the Health and Safety environment. They are also a registered Chartered Institute of Environmental Health training centre offering certified courses in Level 2 Health and Safety in the Workplace.

A few of the most popular courses are below. If you cannot find the course you want please contact us for details. The full range of courses include Health and Safety Induction, Fire Warden, Fire Risk Assessment, COSHH, REACH, Risk Assessment, Business Continuity Planning and all levels of First Aid training.

There are a number of public courses throughout the year open to individuals as well as companies. Please contact us for further information and schedules.

First Aid

- AED Defibrillation Course
- Appointed Persons First Aid at Work
- CPR Training
- Emergency First Aid
- First Aid at Work (Full)
- First Aid at Work (Refresher)

Health and Safety

- Accident Investigation
- Display Screen Equipment (DSE) Assessments
- Employees Health & Safety Induction Course
- Fire Awareness and Risk Assessment
- Fire Awareness for Employees
- Fire Marshal
- General Health and Safety Awareness
- Hazard Analysis and Risk Assessment
- Safe Manual Handling Techniques

Accident Investigation

Who would benefit?

Any manager whose duties include accident investigation.

Objective

This course assists employers and employees to know what needs to be done in the event of an accident at work.

Content

- Legal and moral importance of investigating all accidents.
- Understanding of your roles and responsibilities.
- Ability to undertake preliminary investigation.
- Compliance with statutory procedures (i.e. RIDDOR)

Duration

One day

Assessment

Continuous assessment by trainer and certificate of achievement

Investment

Client site: POA per group
For information on public courses, please contact us.

AED Defibrillation Course

Who would benefit?

This course is designed to give all HSE First Aiders the knowledge and experience to use this lifesaving piece of equipment.

Objective

A practical introduction to AED.

Content

- Heart conditions
- Resuscitation
- CPR protocols
- Use of AED

Duration

Four hours

Assessment

Assessment done by outside assessors and HSE certificate.

Delegate Numbers

Maximum 8

Investment

Client site: POA per group and includes defibrillation unit.

Appointed Persons First Aid at Work

Who would benefit?

This is for all employees who wish to gain a good knowledge of First Aid in an emergency or who wish to be the 'Appointed Person' in the workplace.

Objective

This course enables employees to gain the basic requirements for first aid.

Content

- Principles of first aid
- Resuscitation
- Control of bleeding
- Unconsciousness
- Choking
- Burns and scalds
- Duties of Appointed Persons
- Contents of First Aid boxes

Duration

One day

Assessment

Continuous assessment by trainer and First Aid at Work 'Appointed Persons' certificate which is valid for 3 years.

Investment

Client site: POA per group
For information on public courses, please contact us.

CPR Training

Who would benefit?

This course is a basic introduction for all people who need to learn the lifesaving steps of CPR and Rescue Breathing.

Objective

A practical introduction to CPR and Rescue Breathing.

Content

- First Aid priorities
- Doing the primary survey
- Incident management
- Casualty management
- Treating the unconscious casualty
- Performing resuscitation and CPR
- Treatment for choking adults

Duration

Two hours

Assessment

CPR Certification, continuous assessment by trainer and certificate of attendance.

Delegate Numbers

Maximum 10

Investment

Client site: POA per group
For information on public courses, please contact us.

Display Screen Equipment (DSE) Assessments

Why have assessments?

Health and Safety (DSE) Regulations 1992 are designed to implement Directive 90/270/EEC on the minimum health and safety requirements for work with DSE

Every employer shall perform a suitable and sufficient analysis of those workstations, which are used by operatives or users for the purpose of their undertaking. Regulation 2. Every employer shall ensure that each user (and person about to become a user) shall receive adequate health and safety training in the use of workstations on which he/she is required to work and also when the workstation is substantially modified. Regulation 6

What we can offer

A complete assessment customised to your requirements that at the same time comply with health and safety regulations.

Included in this would be:

- Self assessment (if required)
- Complete workstation assessment
- Individual assessment report with all aspects covered to comply with DSE Regulations.
- Assessment of Home Workers (if applicable)

Investment

Client site: POA per group

Emergency First Aid

Who would benefit?

This is for all employees who may be required to administer first aid and learn basic life saving skills.

Objective

This course enables employees to give emergency first aid quickly and safely.

Content

- Basic life saving skills
- Shock
- Bleeding
- Resuscitation
- Unconsciousness
- First Aid Boxes
- Transporting Casualties
- Bones
- Muscles and joints
- Minor Injuries
- Burns and Scalds
- Eye Injuries
- Poisons
- Record keeping
- Hygiene

Duration

Four hours

Assessment

Continuous assessment by trainer and certificate of attendance.

Investment

Client site: POA per group
For information on public courses, please contact us.

Employees Health & Safety Induction Course

Who would benefit?

This course is suitable for all employees who need an awareness of Health and Safety issues at work and can be used as either a basic awareness course or incorporated into a Company Health and Safety Induction Course. The programme is equally effective for those refreshing their knowledge.

Objective

The course has been developed to assist employers and employees meet the challenges of everyday work situations and safety legislation.

Content

- Health and Safety in the Workplace
- Fire Safety
- Control of Substances Hazardous to Health (COSHH)
- Manual Handling.

Duration

Four hours

Assessment

Continuous assessment by trainer and Certificate of Achievement

Investment

Client site: POA per group
For information on public courses, please contact us.

First Aid at Work (Full)

Who would benefit?

This course is for all persons who wish to be the appointed first aider in the workplace to meet HSE requirements.

Objective

All persons passing the course will receive an HSE First Aid at Work Certificate valid for 3 years.

Content

- Shock
- Bleeding
- Resuscitation
- Unconsciousness
- First Aid Boxes
- Transporting casualties
- Bones, muscles and joints
- Minor injuries
- Burns and scalds
- Eye injuries
- Poison
- Record keeping
- Hygiene
- Communication in an Emergency
- Major injuries.

Duration

Four days

The full Health and Safety at Work First Aid course can be covered in four days either consecutive or one day a week for four weeks.

Assessment

Assessment done by outside assessors and HSE certificate.

Investment

Client site: POA per group
For information on public courses, please contact us.

First Aid at Work (Refresher)

Who would benefit?

This course is for all persons who already have a current HSE First Aid at Work Certificate and wish to renew it for a further three years before their certification expires.

Objective

The full Health and Safety at Work First Aid course can be covered in 4 days either consecutive or 1 day a week for 4 weeks. All persons passing the course will receive an HSE First Aid at Work Certificate valid for 3 years.

Content

- Shock
- Bleeding
- Resuscitation
- Unconsciousness
- First Aid Boxes
- Transporting casualties
- Bones
- Muscles and joints
- Minor injuries
- Burns and scalds
- Eye injuries
- Poison
- Record keeping
- Hygiene
- Communication in an Emergency and Major Injuries.

Duration

Two days

The full Refresher Health and Safety at Work First Aid course can be covered in two days either consecutive or one day a week for two weeks.

Assessment

Assessment done by outside assessors and HSE certificate.

Minimum Number

Minimum five delegates

Investment

Client site: POA per group
For information on public courses, please contact us.

Fire Awareness and Risk Assessment

Who would benefit?

If you are an employer or self-employed and are responsible for business premises, then you will need to act after October 2006. The main effect of the changes will be a move towards greater emphasis on fire prevention in all business premises. Fire certificates will be abolished and will cease to have legal status. Responsibility for complying with the Fire Safety Order will rest with the 'responsible person', usually the employer or site manager. If you are the responsible person you will have to carry out a fire risk assessment, which must focus on the safety of all 'relevant persons'. If you employ five or more people you must record the significant findings of the assessment.

The Order also imposes duties on the responsible person to take general fire precautions to ensure the safety of employees.

Objective

In October 2006 new fire safety rules affecting all businesses in England and Wales came into force. The new Fire Safety Reform Order is a consolidation of existing fire safety legislation and is being introduced to make the law easier to understand and comply with, and is part of the Government's commitment to reduce death, injury and damage caused by fire.

Content

- Overview of the Fire Safety Regulations and what they mean to you
- Knowing your organisation's fire policy and procedures.
- Sources of ignition and fuel.
- People at risk.
- Degree of risk.
- How to complete a fire risk assessment.

Duration

One day

Assessment

Continuous assessment by trainer and certificate of achievement

Investment

POA as depends upon premises size and type

Fire Awareness for Employees

Who would benefit?

The new Fire Safety Reform Order is a consolidation of existing fire safety legislation and is being introduced to make the law easier to understand and comply with, and is part of the Government's commitment to reduce death, injury and damage caused by fire.

The Order also imposes duties on the responsible person to take general fire precautions to ensure the safety of employees which includes provision of information and training in fire safety procedures.

Objective

Understanding of new fire regulation, their duties, and fire safety procedures, including organizations evacuation plans.

Content

- Overview of Fire Safety Regulations and what they mean to you
- Knowing your organisation's fire policy and procedures
- Understanding fire and it starts.
- Minimising fire hazards in the workplace
- Safe waste disposal
- Obstructions to escape routes
- Action on discovering a fire and what constitutes a fire incident
- Guidelines on when and how you should raise the alarm and why people hesitate
- What to do on hearing the alarm
- Guidelines on tackling a fire
- Fire evacuation procedures
- Location of escape routes and how you should use them
- How to use fire doors and fastenings
- The use of lifts during fires
- Procedures for people with disabilities
- The provision and use of fire extinguishers
- Different types of fires
- Different types of extinguishers and their colour codes

Duration

Half day

Assessment

Continuous assessment by trainer

Delegate Numbers

Maximum 40 if lecture style

Investment

Client site: POA per group
For information on public courses, please contact us.

Fire Marshal

Who would benefit?

This course is designed to provide your organisation's nominated fire warden(s) with the knowledge to manage a fire incident. This is for staff members responsible for Fire Safety within the company.

Objective

Covers how to enable companies and organisations to meet the requirements of the Fire Precautions (workplace) regulations 1997 and the new Regulatory Reform (Fire Safety) Order 2005.

Content

- Fire Safety and Prevention
- Chemistry of a fire
- Practical use of fire fighting equipment
- Evacuation Procedures.

Duration

Four hours

Assessment

Continuous assessment by trainer and certificate of achievement

Investment

Client site: POA per group
For information on public courses, please contact us.

General Health and Safety Awareness

Who would benefit?

This course is for managers, supervisors, board members who require an Awareness of Health and Safety issues at work.

Objective

This course covers all aspects of health and safety to give all employees a greater understanding of current legislation and can be adjusted to cover all levels within an organisation (i.e. managers, supervisor and board members).

Content

- Have an understand the Health and Safety at Work Act and relevant legislation.
- Have an understanding of the legal system relevant to health and safety.
- Understand their duties and responsibilities.
- Understand the powers of inspectors.
- Be aware of penalties for a breach of health & safety legislation.
- Recognise the costs of accidents and ill health effects from company activities.

Duration

One day

Assessment

Continuous assessment by trainer and certificate of achievement. NVQ Level 2 Certificate awarded after external exam.

Delegate Numbers

Maximum 10

Investment

NVQ 2 Certificate POA per person
Client site: POA per group
For information on public courses, please contact us.

Hazard Analysis and Risk Assessment

Who would benefit?

All employees who carry out risk assessment as part of their duties.

Objective

Have a basic understanding of the Health and Safety at Work Act and relevant legislation.

Have an understanding of the legal system relevant to health and safety. Understand their duties and responsibilities.

Understand the powers of inspectors. Be aware of penalties for a breach of health & safety legislation. Recognise the costs of accidents and ill health effects from company activities.

Be able to identify the hazards and risks associated with the company's activities.

List the key elements of effective risk assessments and be able to prioritise the outcomes of assessments.

Understand and be able to use the 'Seven Steps' protocol for risk assessment.

Content

Relevant legislation
The principles of risk management
Hazard analysis and risk evaluation
Control and acceptability of risks
Recording results
Safe systems of work.

Duration

One day

Assessment

Continuous assessment by trainer and Certificate of achievement

Investment

Client site: POA per group
For information on public courses, please contact us.

Safe Manual Handling Techniques

Who would benefit?

Anyone whose job involves lifting and moving items, sitting at a computer

Objective

To give delegates a working knowledge of the current legal framework to enable compliance; a working knowledge of relevant ergonomics as pertaining to application of safer moving and handling: knowledge and understanding to assess risk as required in their responsibilities; up to date knowledge and skills in safer handling techniques and the ability to seek practical solutions or assistance with moving and assisting problems when needed.

Content

This practical and inter-active course has ample opportunity to practise the movements under the supervision of the trainer and to discuss their application to attendee's own work. Course materials are provided.

Theory

- Define manual handling and outcomes of training
- Legal framework, employer and employee responsibilities
- Ergonomics and principles of safer handling
- Risk assessment (including generic signage)

Practical

- Beginning the personal action plan
- Practice of safer handling including posture, moving, handling techniques (including supporting, moving loads horizontally and vertically)
 - Test
 - Finalising the action plan
 - Certificates and evaluation

Duration

Half day

Assessment

Continuous assessment by trainer and Certificate of achievement

Investment

Client site: £800 per group
For information on public courses, please contact us.

Life Coaching

What is life coaching?

'Coaching is a process that opens up options and choices for an individual to live the life or have the career they want, rather than the one others say they should have.'

Coaching is about increasing an individual's knowledge and thought processes with a particular task or process. It creates a supportive environment that develops critical thinking skills, ideas, and behaviours about a subject. Life coaching is a process that opens up options and choices for a person to follow.

The value of coaching, within the world of sports, is well known and we often think of this association when we think of a coach. There are obvious similarities with life coaching. Both consider an individual's attitude and belief system that underpin attitudes, behaviours and ultimately results.

In the 1850's the term coach was used in English universities to refer to the person that helped students in exam preparation – although the idea of the trained professional coach originated in the USA, evolving from the practice of therapy and counselling.

However, life coaching is neither counselling nor therapy. A counsellor will delve into the past in order to formulate a specific solution to a particular problem. By contrast the life skills coach will need to understand how the past has shaped the present, but will focus on where the individual is now and where they want to be in the future.

Every situation and every person undertaking a life coaching is unique. The objective is to enable the client to be able to make choices that will enable them to take control of their life by accepting responsibility for all their actions. The coach will guide the client on how to achieve this and will be there to support them along the way.

Also, life coaching is not therapy as a therapist will seek to deal with a specific physical or mental condition whereas the coach will help the client accomplish their objectives by helping them to focus holistically on themselves.

Life Coaching does not require that the coach should have personal experience of a client's sector, business or occupation. In fact it may be that the absence of experience adds to the effectiveness of coaching in this area, as the coach works with the individual so that they can first discover the questions for themselves and then find their own answers.

Life coaching is being increasingly used by people who have reached a point in their lives where they may be asking themselves any or all of the following questions:

- There must be more to life than this...?
- I feel stuck in a job that I don't wish to do any more, but don't know why?
- I have always wanted to But just don't know where to start? or
- I seem to be stuck in a rut and don't know what to do to get out - how do I move forward?

The success of life coaching is dependant upon the client being prepared to take ownership of the options for moving forward.

Coaching is about supporting the client to find the solutions – not trying to provide answers or fixes.

'Feed a starving man a fish and you feed him for one meal ... teach him how to fish and you save his life'

How does the process work?

The client will have an initial conversation with the coach to get to know each other a little and decide whether each party wishes to proceed with the coaching sessions.

Once in agreement to move forward, a brief contract is drawn up to establish the terms of the relationship and what is expected from coach and client.

Sessions will take place according to what works best for the client. Most coaching is carried out over the telephone, for example, an hour-long conversation once a week for a specified number of sessions, at times convenient for the client.

At the outset, the client formalises their overall goal for the process. This goal should be as specific as possible so that it is possible to measure, at the end of the period, whether it has been achieved. At the beginning of each individual session the client establishes what is to be achieved on that day, which will be an interim step towards the overall goal. By the end of each session the client will establish various actions that he/she can undertake in order to move towards the goal that little bit more.

At the end of the contracted period, if a successful outcome has been achieved, the relationship for that goal will come to an end. It is always open to the client to continue the relationship if he/she feels it necessary – this will always be the client's decision.

At all times the client is treated with absolute dignity, confidentiality and respect. The coach undertakes to act with integrity at all times and will recommend different coaches or resources when these will be more appropriate to the client's needs.

Investment

Price on application

All prices exclude VAT

Personal Profiling

- Do you have large numbers of applicants for a job? Do you need a fair means of selecting those to invite for interview?
- Whether the applicant is external or an existing member of staff, how can you be sure who is the best fit for the job?
- Do you have key member of your staff who you want to help with their career development?
- Is there friction between two individuals in a team? Do you want to keep papering over the cracks or identify what the issues are and find a solution?
- Is an existing team not working 100%, are deadlines missed, are there negative tensions?
- Why did that last project take so long to get off the ground, or why was the target date not hit?
- When putting a new team together wouldn't be great to know the personalities that will best complement each other?

All the above are challenges that managers, teams and individuals face every day. Wouldn't it be fantastic if there were some proven scientifically based tools that could help you?

What are Personal Profiling tests?

Essentially, they are structured tasks or instruments that are used to find out about people's abilities, aptitudes, attainments, personalities or interests. They can also indicate someone's capability, preference or willingness to behave in a particular way. Some are used in clinical settings but here we are interested in how they can be used in a work place environment.

Modern psychometric instruments assess people's specific attributes or qualities. They give valuable information to help make decisions when it comes to recruitment, promotion, succession planning, career development, career counselling and training and development

Psychometric tests are tools for measuring the mind ('metric' = measure; 'psycho' = mind). There are two types of psychometric tests: Aptitude tests: which assess abilities. Personality questionnaires: which help to build up a profile of how someone may behave in work situations and how they prefer to work.

Ability Tests

Also known as cognitive, aptitude or intelligence tests, these do not examine someone's general knowledge but test their critical reasoning skills under strictly timed conditions. There are many different types of tests depending on the type and level of job that needs to be filled. However, a typical test might have three different sections each testing a different ability e.g. verbal reasoning, numerical reasoning and diagrammatic or spatial reasoning. Typically, the test would allow 30 minutes for 30 or more questions.

An individual's score on these tests is compared to a 'norm group' which can be the general population or distinct groups i.e. managers and graduates. Employers can set their own standard in terms of how well applicants have to do in comparison with the 'norm group' in order to continue with the selection process.

Personality Questionnaires

Someone's success in a job, their ability to become one of the team doesn't depend on intelligence but rather personality and characteristics. Personality questionnaires focus on aspects of personality such as:

- How someone relates to other people
- Someone's work style
- An individual's ability to deal with emotions (their own and other people's)
- Someone's motivation, determination and general outlook
- An individual's ability to handle stressful situations

Unlike ability tests, there are no right and wrong answers.

With these questionnaires it is important for the individual to be themselves. It is in no one's interest for a person to try and second guess the answers that are wanted. Very often there are checks within questionnaires to detect whether someone is trying to give a false impression

Examples of these profiles include Myers Briggs (MBTI), 16PF, Belbin, Insights & Occupational Personality Questionnaire (OPQ).

Which Tool

It's horses for courses, really. There are literally hundreds of tests and questionnaires available. You need professional, unbiased guidance on the tool that will best deliver the information you are looking for. Psychometric instruments should be run, scored and interpreted by trained personnel to ensure consistency. Producers of these tools should only make them available to qualified practitioners.

Investment

Costs vary considerably. An Ability test, either completed on-line or with paper and pencil, could only cost a few pounds. One-to-one executive coaching or running a team-building event will require the services of a qualified consultant. However, these costs are minimal compared with the cost of doing nothing. If you were to look again at the questions posed at the beginning of this article you will quickly identify the costs that could be saved, and the potential released, which would more than pay for the cost of any psychometric assessment and connected counselling and training.

Confirmation

On receipt of your booking

4D Group will issue a letter of confirmation and invoice. Acceptance of a booking constitutes a liability for the relevant fee or cancellation fee and is subject to our standard terms and conditions as itemised on this page. We can accept payment by cheque or BACS. Our BACS details are available on request and are printed on our invoices. Terms for invoice settlement are strictly 14 days from date of invoice. All fees quoted are subject to VAT.

For all other events a contract will be issued by either e-mail or post to clients within five working days of 4D Group accepting the booking. Where a contract is issued, 4D Group requires that the client signs and returns a hard copy to 4D Group within 14 days of the date of the contract. Should 4D Group not receive from the client a signed copy of the terms and conditions by 14 days of the date of the original contract, the booking will be deemed cancelled.

4D Group reserves the right to alter course fees with notice of one month in writing prior to the alterations coming into effect. The fee includes where appropriate, course materials, meetings, courier charges and trainers' travel expenses.

Cancellations

If you need to cancel

Cancellation fees are as follows:

- 21 working days or more from course date no fees.
- 11 to 20 working days from course date 50% of fee
- 10 or less working days from course date 100% of fee

A transfer, once only, will incur no fee. A subsequent transfer on that same booking is subject to our standard cancellation fees. An alternative delegate may be substituted at any time free of charge.

If we need to cancel

We know that the cancellation of events by us causes inconvenience and we therefore endeavour to run requested events. In the event that a course is unviable, for whatever reason, we reserve the right to cancel the training at our discretion. In the event of 4D Group cancelling a course, notice will be given, wherever possible, at least five working days prior to the agreed training date. In the event of the cancellation of a course, whilst every effort will be made to reschedule, no guarantee to this effect can be made.

Course Information

Our courses are designed and presented by specialists and are intended to be participative where appropriate. To ensure this, the number of delegates accepted on each course is restricted thereby enabling the full benefit of discussion and interaction between delegates and speaker.

The course outlines in this directory are intended as a guide since courses are regularly reviewed and updated to reflect developments as appropriate.

Course handout material is provided as an aid to learning and understanding and to avoid copious note taking. It is only available to those booked on training and is not sold separately. No part of the handout material may be reproduced without permission.

Opinions expressed are those of individual speakers and not necessarily those of 4D Group.

Everyone attending a course is requested to complete a course evaluation form. These are regularly reviewed to ensure that quality is maintained.

We reserve the right to alter or reschedule published programmes, timings, speakers, fees or venues without prior notice.

Timings

One day courses start at 09:30 and finish at approximately 16:30 unless stated in the contract, or by prior arrangement. Half day training also starts at 09:30 and finish at 12:30 unless otherwise stated in the contract, or by prior arrangement.

Certificates of Attendance

These are provided if actively requested when booking the training.

Mailing List / Data Protection

Information provided to us at the time of booking is held on our database and is used to communicate information of future training to you and your organisation. We do not make the information contained in our database available to any other organisation for any purpose. If you wish to be removed from our mailing list or would like your details updated, please send a note of your requirements to: Bridge House, 58 Boxgrove Road, Guildford, Surrey GU1 1UD email to info@4DGroup.co.uk.

Trainers/Consultants

Clients are not permitted to contact any trainer/consultant that has been introduced by 4D Group directly by any means whatsoever and this includes verbal, e-mail, text, telephone, fax, letter. Should direct contact become necessary (to discuss your specific training requirements) permission of 4D Group will be granted to you by e-mail.

4D Group shall indemnify the client from and hold the client harmless against any claim by any of its staff, trainers, sub-contractors or consultants brought in relation to any loss or damage to the goods or property of 4D Group or such person or for or in relation to the death or of personal injury to such person, save insofar as such death or injury is caused directly by the negligence of the client.

Fee Summary

The fee includes where appropriate, course materials, meetings, courier charges and trainers' travel expenses.

All prices stated exclude VAT

Information Technology

Microsoft training at client site:

(Introduction, Intermediate, Advanced, VBA)	One to one training	£360 per day
	One to one training	£300 half day
	Groups (two to eight delegates)	£495 per day
	Groups (two to eight delegates)	£375 half day

Please refer to other software for rates.

Personal Development

Please refer to individual courses for rate and minimum delegate numbers

Full day	£995 per day
Half day	£750 half day

For other fees, see appropriate section in this directory or contact us

Contact Us

For course enquiries and bookings, please contact:

Dee Rutherford

Managing Director

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