



2023

COURSE CATALOG

SMART Conversations®

Learn. Lead. Succeed.



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Introduction

About Us



Our Business—We Care About Your Success

Our experts deliver the following services to support your organization's corporate strategy:

- Individual and team **coaching**
- Organizational development **consulting**
- Communications and leadership **training**

Our offerings

Coaching—individuals and teams

We can help you tackle performance issues, enhance intact team communications or collaboration, and build the skills of your employees, managers and executives. Or, we can provide coaching as a post workshop follow up. Tell us what you need, and we will develop a personal or team action plan that leads to success.

Consulting—communications & leadership

Perhaps you need help developing a curriculum or revising your customer service letters. Maybe you need an expert to review your presentation strategy or write compelling web content. We provide professional and creative support in these areas:

- Leadership
- Organizational development
- Presentations
- Writing

We can help you accomplish your business goals by providing services that deliver immediate results.

The biggest advantage: expertise and time. We're there when you need us and gone when you don't.

Training—performance improvement

Communications—professional business writing, email and presentation skills ensure that your message—whether intended to persuade, inform or educate—is clear and concise. Our custom designed workshops focus on analyzing audiences, setting objectives and delivering messages effectively. To optimize your success as a speaker, presentation skills training covers the seven key delivery skills and how to write compelling content.

Leadership—our custom-designed personal and organizational leadership workshops provide just-in time training to meet your immediate needs. Courses cover a range of topics critical to business success.

Our Expertise

Our principal trainers are business professionals with years of experience in human resources, training and in the field. We keep up to date on trends and research, attend conferences, network with like-minded professionals, and we teach what we know.



Paul Weisman

OD Consultant,
Master Facilitator/ Coach, CPCC

Paul is a trainer, coach and management consultant with strong education and business credentials in each practice area. His signature training is SMART Conversations®, a relationship building approach that helps organizations increase productivity, improve staff retention, foster excellent client service and achieve outstanding results.

He is also a Certified Professional CTI Co-Active Coach, CPCC. He helps clients get what they want by helping them identify their blind spots and learn new skills to achieve high-value results.

Paul is also a professional engineer and business leader with two degrees in Civil Engineering from the University of Massachusetts and the University of Michigan. He has 34 years of consulting engineering experience and an extensive background developing, leading and managing major projects, teams and business startups; strategic and business planning and business development; and corporate and operational management. Paul believes in the power of SMART Conversations® to transform individual, team and organizational performance.

Michele is dedicated to client satisfaction and high-performance learning experiences. She helps clients solve their organizational development problems, coaches high performers to success and leads specialized soft skills program that yield measurable impact.

Michele also designs and develops custom performance improvement programs and delivers them with a warm, supportive, interactive style. As a certified business writing and presentations skills trainer, Michele has developed high-impact communications training programs for numerous organizations. She is a former radio announcer and a professional writer.

Previously, Michele served as manager of proposal development and marketing communications at Ernst & Young, Boston. She has also consulted for The Forum Corporation, an international training development company, where she developed communications programs to support the rollout of leadership training.

Michele holds an M.A. degree in Professional Writing and Publishing from Emerson College, and she has an undergraduate degree in Journalism/Public Relations. She is the author of numerous articles and is in the process of writing a book titled: The Six Questions.



Michele Simos

Chief Learning Officer

Our Clients

We have been fortunate to work with organizations representing several industries with unique cultures. They range from Fortune 500 to non-profits and government agencies—and everything in between. These are a few of the clients we have served:

 Abbott Pharmaceuticals

 Blue Cross/Blue Shield

 Fidelity

 Gillette

 Marriott Hotels

 Aetna

 BOC Edwards

 Ford

 HC Stark/Bayer

 Morgan Stanley



Morgan Stanley

Coaching

for Success

Need support moving into a new role? Writing skills need refinement? Presentation skills crying out for a boost? Or, do you need to polish a few rough spots relating to the way you approach and influence others? At critical points in your career, you may need help that a college course, workshop or book cannot provide. That's why coaching, previously focusing on executives, has expanded to touch all levels of an organization.



Individual Coaching not just for executives anymore

Coaching is a powerful professional partnership. Our skilled organizational and personal development experts use appreciative inquiry, continuous learning approaches, systems thinking and a personal, positive approach to success.

Our program provides structure, motivation, feedback and accountability on a regular basis as well as...

- One-to-one attention
- Individualized learning programs
- Clear, goal-based action plans
- A confidential relationship
- Measurable performance improvement

Coaching

for Success

Team Coaching moving teams from good to great

Effective, productive teams are critical to an organization's success. Give intact teams the opportunity to...

- Optimize its communication skills
- Improve teamwork
- Deal with productivity issues
- Develop pathways to innovation
- Enhance performance
- Build personal effectiveness

Our coaches provide insights and create opportunities for optimizing team strengths. We work with teams of all disciplines and sizes, including newly forming or project teams, teams in transition, teams in chaos, and well-established teams that need to re-energize.

On-Call Coaching Plus—involving the organization

Evolving out of 14 years of professional development coaching focused on executive and leadership development, business development and project management/delivery, we have created a powerful organization-based alternative program that is flexible, affordable and sustainable re: impact/results.

Here is the idea: Your firm commits to a min of a ½ -day per week (allows for coaching of up to 6 staff) over a 6 month term. Within that ½-day per week commitment, services will consist of coaching and/or any combination of coaching/training/strategic advisory services that meet your unique needs. We offer a wide range of services to draw from.

Value Proposition: In return for a long term (6 month min.), we are able to:

- Lower the price to less than ½ the fee for coaching 6 staff on a one-at-a-time basis
- Provide any combination of services we offer to meet your unique and changing needs
- Provide a dedicated time commitment, a highly flexible model and the value-add of shaping our services to enhance your organizational/business strategy



Consulting

Consultants fill a unique role

We can view your organization and its issues, products and services objectively. Because we can often see things that may be invisible to you, we can offer an outsider's perspective. We can be your customer, your employee, your manager or your executive. What we do depends on what you need.

Your staff can do what it does best while we do what we do best. Hire us on a project basis, so you can maintain head count and avoid expensive benefits and overhead. We're there when you need us and gone when you don't.

Consulting can take many forms; it all depends on your needs. We can help you accomplish your business goals by providing services that deliver immediate results. For example, we can help you in these areas:

Leadership

- Identify development needs of your key players and teams
- Assess team building opportunities
- Set up a mentorship support program

Organizational Development

- create and implement strategic training plans and develop curricula
- conduct in-depth organizational needs assessments
- identify and implement just-in-time training—for example, team building, change management, quality initiatives, train the trainer
- manage instructional design and create or update course materials

Communications

Presentation Skills

- √ Write or review keynotes
- √ Facilitate a persuasive presentation sales strategy, including messaging
- √ Develop team presentations
- √ Create presentation support materials, including powerpoint® slides, handouts and marketing collateral

Writing

- √ Develop and/or edit web content, e-zines or employee newsletters
- √ Evaluate and/or revise customer service correspondence
- √ Develop proposals with strategic impact
- √ Roll-out, re-launch and support training initiatives
- √ Create organizational email and writing style guide

Training



The learning experience

Curiosity. Breakthrough thinking. Metamorphosis. Experienced facilitators and trainers know how to design learning experiences that work. Face-to-face training gives you

- Focused, productive time in a learning environment
- A structured program flexible enough to change as new issues arise
- Personal attention
- Stimulating classroom dynamics
- Opportunities to exchange ideas

We design your instructor-led workshops to harness the intellect, energy and flow in the moment. Then, we help support the transfer of learning from the classroom to the workplace through follow-up training and coaching.

Flexible delivery approaches

We can also deliver training in bite-sized chunks, so your workforce can do their jobs with minimal interruption. And, when it makes sense, we can leverage the following delivery methods: webinars, online courses, video conferencing and more.

Training

Who attends?

At the big picture level, anyone and everyone. Attendees come from diverse backgrounds with varying levels of expertise. People with little or no background in the topic to experts seeking a refresher course. From AAs to CFOs, medical doctors to marketers, sales reps to VPs, customer services reps to ...well, you get the picture.

At the client level, you define the workshop's audience. You may opt for either an "open session" or an "intact team" module. Typically, an open session comprises a spectrum of attendees. An "intact team" module consists of attendees that work together as a group, as a team, as a department, or in a single discipline. We help you determine which option best suits your training goals.

The individual, the team and the organization. Positive class evaluations tell only half the story. We encourage coaching and continuous follow up to ensure that our training sticks. It's not difficult getting people to like us—that's easy. We want to give you answers to the tough questions:

- What did your participants actually learn?
- What will they take away from the class?
- How will they actually practice, build on and apply their new skills?
- What tools or resources do they have to support their learnings?
- How can they access more help or get to the next level?

The bottom line: we care about your results because they are a reflection of our results. And, we will work with you to make sure that learning happens and takes hold.

Customization—have it your way

We have two definitions of customization: customizing to the needs of the workgroup and creating "new" custom workshops/programs.

One: Customizing to the needs of the workgroup/class

Each workshop is self-customizing based on the audience. The core workshop material is standard, but we customize the class experience by drawing upon real-life scenarios and sample materials.

Two: Creating new workshops/programs

Don't see the communication or leadership workshop you need in our catalog? Let's discuss. We are experienced organizational development consultants and curriculum designers. We can create custom workshops and training programs to meet your training goals.

Business Writing

Professional business writing skills are critical to business success. Clear, concise, client-focused proposals, letters, reports, memos, emails and other documents build relationships, sell services and enhance your brand image. Arm your team with the tools they need to create persuasive documents that attract attention, hold their audience's interest and initiate action.

Essentials of English Grammar I

Need a refresher in basic grammar usage? In this fundamentals class, you will build your confidence and your writing skills by reviewing the essentials of the eight parts of speech, sentence patterns and basic punctuation. We'll also cover the most common grammatical errors and develop an action plan for your continued improvement. We will use *Elements of Style* by Strunk & White as a reference tool.

Essentials of English Grammar II

This workshop builds on the basics learned in Essentials of English Grammar I. Through hands-on writing exercises and activities, we will practice the skills of writing correctly, clearly and concisely. Using the *Elements of Style* as a reference, you will learn how to recognize and correct errors in syntax and punctuation. You will also practice writing sentences and developing paragraphs for easy reading.

PowerEditing

Quality documents make a first and lasting impression on your customers. Why put your company's image and reputation at risk by sending sloppy documents? Train your support staff to be your internal editors by giving them the practical skills they need to professionally, quickly and confidently edit the work of others. We'll also review proofreaders' marks, spelling and grammar usage.

PowerWriting

Clear, concise memos, letters and emails make good business sense. They attract and engage audiences, leave a professional impression and get results. In this workshop, you will learn how to write clearly and concisely, target a specific audience, develop a purpose statement and more. Through hands-on exercises and practice, you will also discover how to create strategic documents quickly and effortlessly. *** Tailored programs for Technical and Sales audiences available.

SMART Email™

Concise, strategic email engages your readers and drives results when it also observes proper "Netiquette." Don't offend your readers by unintentionally talking down to them, writing an angry response, using sarcasm or showing disrespect. This workshop will help you understand how to create professional emails that convey a clear message that is delivered in a respectful way that builds—not tears down—relationships.

Advanced

Communicating Strategically

Writing to persuade requires a sound strategy. To achieve the results you're after, you must analyze your audience, develop your message and test it. Through exercises, discussion and practice, your managers and executives will learn how to reach resistant and unresponsive audiences. We will discuss audience analysis in depth and address on-the-job scenarios.

PowerWriting: Presentations

How do you create a presentation? Where do you begin? How do you support your viewpoint? How can you best persuade your audience to take action? Whether a formal or an informal presentation, planning is essential. In this workshop, learn how to assess your audience, develop and organize an effective presentation, and create impactful visuals.

*** Tailored programs for Technical and Sales audiences available.



Sales/ Marketing

Mastering Marketing Communications

Perhaps you're new to marketing. Or, maybe you're a techie who needs to write with a sales flair. This workshop introduces you to a simple creative writing process. Through lectures, interactive discussions and writing exercises, you'll receive the tools you need to develop persuasive marketing communications collateral that elicit action.

PowerWriting: Executive Summaries

Information overload affects us all. More and more, managers are crying out for executive summaries that tell the story in one page. Learn an easy process for writing efficient and effective executive summaries that convince, communicate and clarify. Don't let your important report findings and proposals land in the recycle bin; make sure they are read, understood and acted upon.

Writing Sizzling Sales Letters & Emails

Spend less time at the keyboard and more time with your customers by learning how to write persuasive, strategic documents that sell. This workshop arms you with the skills you need to write persuasive letters and emails that are clear, concise and action based. Best of all, you will learn to compose your communications in up to 50% less time, which gives you more time to do what you do best: sell.

Writing Winning Proposals

Proposals that win business don't just tell—they sell. Stand out from your competitors by creating focused, well-constructed proposals that (1) answer the prospect's questions effectively; (2) demonstrate clear thinking; (3) contain a strategic focus; and (4) differentiate your organization. We will select an in-class project based on the types of proposals you create. For example, we can write an executive summary, revise an existing proposal, design a new template or write a section of a new proposal.



Leadership Development with

SMART Conversations®

Every organization hungers for effective leadership. How can we challenge and inspire leaders to clearly communicate their visions so that success can be defined and accomplished? The answer lies within each leader or potential leader. Effective communication is one of the critical keys to success. Every leader must be able to communicate their vision to the entire team effectively, persuasively and with confidence.

Effective Leaders must learn how to develop and refine their skills in...

- Acknowledging others
- Delegating tasks and projects
- Giving and receiving feedback
- Practicing active listening
- Affirming and building others' strengths
- Fostering teamwork
- Inspiring others to achieve their goals
- Resolving conflicts

All of our leadership programs are custom designed to fill your particular needs. We use SMART Conversations® communications skills as a platform on which to build an effective program. We typically collaborate with colleagues, other experts and internal organizational development professionals to ensure that we have all of the skills, knowledge and insight on board to create a synergistic result that is unique to your organization.

SMART Conversations®

A Platform for Learning

Based on the work of Stephen Covey, Peter Senge, David Bohm and other thought leaders, SMART Conversations® workshops provide the tools people need to be effective communicators. This work focuses on teaching the skills of engaged listening and inquiry, which gives people a framework for receiving and giving information without judgment.

By applying the 5 principles of SMART Conversations®, teams can see each others' points of view, learn from best practices and create innovation. Open minds and positive relationships often make the difference between team success and failure. When people can work together, appreciate one another's differences and learn together, then they can leverage the insights, perspectives and knowledge that each one of them possesses to create synergy, a result that emerges from a collective mindset.

Presentation Skills

Does performance anxiety prevent you from presenting to your potential? Perhaps you're unsure how to manage audience dynamics? Or, you don't know whether your presence is working for or against you. Our presentation skills classes and Train the Trainer curricula combine fundamental skills for success with opportunities for learning the latest trends for imparting information and generating dialogue. Whether you are new to presenting, or a veteran in need of polishing a few rough spots, we can help you reach your potential as a presenter. Our workshops, which include coaching, will help you develop confidence, handle difficult situations with ease and forge memorable connections with your audiences.

PowerPresenting I

Are you presenting with authority? Are you sending the right message to your audience? Powerful presentation skills are acquired through observation, evaluation and practice. Using videotaped exercises and 'live' feedback, you will learn seven key delivery skills, including effective posture, gestures and movement. In addition to managing your physical self, you will also discover how to engage audiences, get to the point and create a well-organized presentation.

*** Tailored programs for Technical and Sales audiences available.

PowerPresenting II

This course builds on the skills learned in PowerPresenting I with a focus on how to persuade your audience to take an action or adopt your viewpoint. You will also learn how to handle Q&A sessions, manage hostile audiences, reduce your reliance on notes and create/interact with visuals. All presentations will be videotaped for in-class critique and in-the-moment improvement.

*** Tailored programs for Technical and Sales audiences available.

Proposals that win business don't just tell—they sell. Stand out from your competitors by creating focused, well-constructed proposals that (1) answer the prospect's questions effectively; (2) demonstrate clear thinking; (3) contain a strategic focus; and (4) differentiate your organization. We will select an in-class



Train-the-Trainer Certification

Certified in-house trainers bring scalability, flexibility and affordability to organizations in need of training on a large scale. Our master facilitators can certify your staff trainers through our Train-the-Trainer programming.

To maintain a high level of quality, we may require candidates to possess baseline knowledge of the subject matter to teach certain classes. However, we will work with you any way we can to bring our programming in-house to meet your needs.

What are the benefits?

- Affordable classes when and where you need them
- On-site expertise access to proprietary job aids and tools
- Prepared binders and materials you can order in advance
- Pre-produced facilitator's handbook, participant guides and course timelines
- Certified quality training in specific subject matter

To make your job easier, we also offer licensing Agreements and will provide you with all of the materials, including PowerPoint Slides, to ensure your training is a success.

Specialty Services:

Conferences

Conference Breakout Services

Planning a conference can be a daunting task. We can help design and develop the learning portion of breakout sessions. Our experts will work with you to build custom, strategic breakout sessions that

- Deliver high quality content
- Provide information in interactive and entertaining ways
- Give you and your colleagues tools to perform your jobs better

Custom Keynotes

Keynote speakers can make or break your sales meeting, corporate luncheon or special event. That's why it is in your best interest to make sure you know your audience, their interests and expectations. Please call us for more information at 781-844-4916.



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