

The Merit Curriculum Guide

MERIT TRAINING CORPORATION
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MERIT TRAINING CORPORATION CURRICULUM GUIDE

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Section One

Introduction

HOW TO USE THIS GUIDE

This guide was prepared to assist you in determining which subject, courses or modules you may require to satisfy a need in your organization. The training and consulting modules that appear herein are all professionally developed and have been tested in hundreds of organizations, both domestically and in the global markets.

Section One features a **Needs Analysis and Training Assessment Tool** to help you determine which courses or modules are required by an organization to facilitate success. This includes a vehicle for analyzing any training course to determine if that course meets with your own criteria.

MERIT has presented workshops to industry groups as varied as manufacturing, banking and finance, insurance, high tech research, healthcare and pharmaceuticals, utilities, construction, government, airlines, telecommunications, hotels and hospitality; and retail.

In the following **seven sections** of this guide, you will find training modules that can be grouped together to form a complete course, or curriculum for your people, in management, sales, service or in operations.

All modules presented in various sections are designed to be conducted either by your own trainers, after being certified by Merit, or by a certified facilitator from Merit. Each of these modules can be conducted individually with a leader guide, or grouped to form a more extensive curriculum, with a comprehensive leader's guide that may be ordered from Merit. Modules in this category are usually taught in a 2 to 4 hour session.

All modules may become part of a complete cultural transition designed for your business including, a new sales and service culture, or a new customer focused culture. See section eight for the methods used by Merit for cultural change.

Merit also has a complete library of Videos that we would recommend, that can be acquired from CRM Films, and can be used to enhance your training experience for any of the Merit curricula.

Any of these programs may be ordered by calling our main number at 800 677 1667 or sending us an e-mail www.merittrainingcorp@cox.net . In addition, you may take advantage of our free consulting service, by emailing us or calling us for a thorough assessment of your needs, and our recommendation for a program for your business.

Needs Analysis Tools

BUILDING YOUR LEARNING ENVIRONMENT CURRICULUM

To begin the process of building your Learning Environment, it is helpful to conduct a study of the business need for skill development, as well as an assessment of where you currently are in the process. A simple four-step process is recommended, as follows:

BUILDING YOUR LEARNING ENVIRONMENT CURRICULUM

1. Assess the Business Strategy
2. Conduct a Needs Assessment
3. Develop the Curriculum
4. Put Your Training Plan into Action

1. Assess the Business Strategy

An organization will need to assess future goals and objectives of the strategic plan. Review those goals and try to determine how well employees are able to support needs of the organization. Identify gaps in the current training and development curriculum.

2. Conduct a Needs Assessment

Review each business unit or work unit to determine the training needs. Survey individuals, conduct a round of telephone calls or set up an advisory board to gather the information needed to make an assessment. Involve both managers and staff. Draft a preliminary needs assessment and discuss the document with the advisory group.

3. Develop the Curriculum

Based on the information from the advisory panel, put together a listing of skills or "core competencies" to be developed for each employee group, along with the suggested solution. Look at the current curriculum and add in Merit modules to fill the gaps.

4. Put The Training Plan into Action

Work up a schedule for training and set out a curriculum for each employee group. Require that employees take responsibility for their own training and development. Offer self-paced courses, computer-based courses and video training programs. Utilize effective training media that is enjoyable and motivating.

CRITERIA FOR TRAINING PROGRAM EVALUATION

Organizations will need to analyze the effectiveness of the training resources currently in use and in developing future programs. A standard from which all training can be evaluated is helpful in conducting the initial needs assessment.

The following criteria are provided as examples:

CRITERIA FOR TRAINING PROGRAM EVALUATION	
1.	REINFORCEMENT OF CULTURAL MESSAGES
2.	REINFORCEMENT OF BUSINESS IMPERATIVE
3.	RELEVANCE TO JOB
4.	FLEXIBILITY
5.	SOUND INSTRUCTIONAL DESIGN METHODOLOGY

Based upon the Learning Environment philosophy and principles, there are several key criteria against which training programs and curricula can be assessed:

1. REINFORCEMENT OF CULTURAL MESSAGES

- a. **Senior Management Strategy.** To what extent do they reflect senior management's perspective of how the communication and training process can contribute to a more effective and rapid implementation of the strategy?
- b. **Develop Culture.** To what extent do the training components help to develop the culture needed to compete effectively?
- c. **Achieve Objectives for Business Unit Strategy.** To what extent does the training contribute to the achievement of the objectives of the business units?
- d. **Multiple Initiatives.** To what extent do they clarify how the multiple company initiatives are linked to the organizational strategy to provide a more integrated picture of the strategic direction of the organization?
- e. **Core Competencies.** To what extent do they reinforce and build upon the core competencies needed for success?

2. REINFORCEMENT OF BUSINESS IMPERATIVE

- a. **Reinforce Business Reason.** To what extent does the training reinforce the business reason for conducting the training?
- b. **Solve Business Problems.** To what extent are real problems used and solved during the training?
- c. **Performance Standards Tied to Business Strategy.** To what extent is the material relevant to the performance management standards?
- d. **Cost Justification.** To what extent does the training contribute to the financial performance of the organization? Are the results to be achieved clearly delineated? Can we measure the results?

3. RELEVANCE TO THE JOB

- a. **Tailored to Audience.** To what extent can the training modules be tailored to the needs of the business unit?
- b. **Real Situations.** Do training activities reflect “real” situations that the employee will encounter?
- c. **Core Competencies.** Do the training activities teach core competencies needed on the job?
- d. **Appropriate to Career Stage.** Is the component relevant to the trainees’ jobs at that particular stage in their career?

4. FLEXIBILITY

- a. **Effective Use of Time.** Is the training an effective use of time? Is the length of the course appropriate for the objective to be obtained?
- b. **Effective Use of Training Resources.** To what extent do they make the best use of training resources currently available in the organization? How can we best utilize available materials, people, and other training resources as part of the overall training and implementation strategy?
- c. **Easy to Use for Non-Professional Trainers.** To what extent are the training components “user friendly”? Is the training process easy to implement and monitor given the constraints of staffing levels? Can non-professional trainers be certified easily? Once the methodology is learned, can trainers teach other modules without extensive re-certification?
- d. **Multiple Formats.** To what extent is the training offered in alternative formats? Is the training adaptable to the needs of non-traditional work hours? Is the material presentable in shorter modules? Is the material effective on a self-paced basis?

5. SOUND INSTRUCTIONAL DESIGN METHODOLOGY

- a. **Business Strategy Context.** To what extent does the training refer to the business need for the training? Are real-life examples used in the training to reinforce the meaning and usefulness of the training?
- b. **Use of Consistent Models.** Are models used to give participants an overview of the course? Is this model used throughout the phases of the training? Do subsequent courses reinforce the model? Do participants understand and see the usefulness of the model?
- c. **Three Phases of Training.** Are pre-workshop assignments required? Are post-workshop implementation action items built into the training? Is the training reinforced by managers or co-workers?
- d. **Well Documented Leader's Guides.** Are trainer materials easy to use and refer to? Are leader's notes provided? Are answers to exercises provided when applicable? Are charts, overheads and leader's aids provided?
- e. **Interactive Training.** Does the training use varied media for delivery? Are the participants engaged into the training with exercises, role plays, demonstrations, etc.? Are techniques used to communicate with all types of learners (visual, audio and kinesthetic) employed in the training?

TRAINING PROGRAM NEEDS ANALYSIS WORKSHEET

Target Audience: _____ Date: _____ Purpose of the Analysis: _____

KEY SKILL AREA	NEEDS ASSESSMENT		COMMENTS AND/OR ACTION STEPS
	Low Need	High Need	
I. PERSONAL AND CAREER DEVELOPMENT SKILLS			
1. Self Development	1 2 3 4 5 6 7 8 9 10		
2. Career Development	1 2 3 4 5 6 7 8 9 10		
3. Empowerment	1 2 3 4 5 6 7 8 9 10		
II. COMMUNICATION AND INTERPERSONAL EFFECTIVENESS SKILLS			
1. Communication	1 2 3 4 5 6 7 8 9 10		
2. Effective Listening for Improved Communication	1 2 3 4 5 6 7 8 9 10		
3. Strategies for Interpersonal Relationships	1 2 3 4 5 6 7 8 9 10		
4. Conflict Resolution	1 2 3 4 5 6 7 8 9 10		
III. TEAM DEVELOPMENT SKILLS			
1. Teamwork	1 2 3 4 5 6 7 8 9 10		
2. Creative Problem Solving	1 2 3 4 5 6 7 8 9 10		
3. Encourage Innovation	1 2 3 4 5 6 7 8 9 10		
4. Encourage Improvement	1 2 3 4 5 6 7 8 9 10		
IV. CUSTOMER SERVICE SKILLS			
1. Telephone Skills	1 2 3 4 5 6 7 8 9 10		
2. A Positive Attitude	1 2 3 4 5 6 7 8 9 10		
3. Conveying Knowledge	1 2 3 4 5 6 7 8 9 10		
4. Identifying Customer Expectations	1 2 3 4 5 6 7 8 9 10		
5. Your Role in Delivering Excellent Service	1 2 3 4 5 6 7 8 9 10		
V. MARKETING AND SALES EFFECTIVENESS SKILLS			
A. Market Analysis and Planning			
1. Analyze Your Marketplace	1 2 3 4 5 6 7 8 9 10		
2. Develop a Marketing Plan	1 2 3 4 5 6 7 8 9 10		
3. Prospecting	1 2 3 4 5 6 7 8 9 10		
4. Marketing by Mailing	1 2 3 4 5 6 7 8 9 10		
5. Control Marketing Results	1 2 3 4 5 6 7 8 9 10		
B. Account Analysis and Planning			
1. Prepare: Understanding Your Customer's Needs	1 2 3 4 5 6 7 8 9 10		
2. Analyze Customer Accounts	1 2 3 4 5 6 7 8 9 10		
3. Strategize Customer Accounts	1 2 3 4 5 6 7 8 9 10		
4. Organize Customer Accounts	1 2 3 4 5 6 7 8 9 10		
5. Implement Customer Relationships	1 2 3 4 5 6 7 8 9 10		
C. Consultative Selling Skills			
1. Relate to the Client	1 2 3 4 5 6 7 8 9 10		
2. Discover Your Client's Needs	1 2 3 4 5 6 7 8 9 10		
3. Present Solutions	1 2 3 4 5 6 7 8 9 10		
4. Resolve	1 2 3 4 5 6 7 8 9 10		
5. Confirm and Take Action	1 2 3 4 5 6 7 8 9 10		

TRAINING PROGRAM NEEDS ANALYSIS WORKSHEET (CONTINUED)

KEY SKILL AREA	NEEDS ASSESSMENT		COMMENTS AND/OR ACTION STEPS
	Low Need	High Need	
VI. LEADERSHIP AND MANAGEMENT SKILLS			
A. Creating Organizational Excellence			
1. Establishing a Philosophy of Organizational Excellence	1 2 3 4 5 6 7 8 9 10		
2. Developing and Communicating Your Vision and Mission	1 2 3 4 5 6 7 8 9 10		
3. Managing Change	1 2 3 4 5 6 7 8 9 10		
4. Ethical Leadership	1 2 3 4 5 6 7 8 9 10		
B. People Management			
1. Accepting a Management Role	1 2 3 4 5 6 7 8 9 10		
2. Recruit a High Performance Team	1 2 3 4 5 6 7 8 9 10		
3. Orient New Team Members	1 2 3 4 5 6 7 8 9 10		
4. Train and Provide a Career Path	1 2 3 4 5 6 7 8 9 10		
5. Plan and Appraise Performance	1 2 3 4 5 6 7 8 9 10		
6. Motivate and Compensate	1 2 3 4 5 6 7 8 9 10		
C. Performance Management			
1. Roles and Responsibilities	1 2 3 4 5 6 7 8 9 10		
2. Standards and Objectives	1 2 3 4 5 6 7 8 9 10		
3. Monitoring Performance and Providing Feedback	1 2 3 4 5 6 7 8 9 10		
4. Coaching for Optimal Performance	1 2 3 4 5 6 7 8 9 10		
5. Reinforce, Recognize and Reward	1 2 3 4 5 6 7 8 9 10		
D. Measuring Productivity and Efficiency			
1. On-The-Job Training	1 2 3 4 5 6 7 8 9 10		
2. Unleashing the Power of Employee Efficiency	1 2 3 4 5 6 7 8 9 10		
3. Understanding Profitability	1 2 3 4 5 6 7 8 9 10		
4. Overcoming Negativity in the Workplace	1 2 3 4 5 6 7 8 9 10		
E. Management Tools and Techniques			
1. Time Management	1 2 3 4 5 6 7 8 9 10		
2. Project Management	1 2 3 4 5 6 7 8 9 10		
3. Meeting Management	1 2 3 4 5 6 7 8 9 10		
4. Presentation Skills	1 2 3 4 5 6 7 8 9 10		
5. Effective Negotiating Skills	1 2 3 4 5 6 7 8 9 10		
F. Process Improvement/Quality			
1. Streamlining Business Processes	1 2 3 4 5 6 7 8 9 10		
2. Benchmarking the Best Practices	1 2 3 4 5 6 7 8 9 10		
G. Business Law and Management			
1. Business Ethics	1 2 3 4 5 6 7 8 9 10		
2. Diversity	1 2 3 4 5 6 7 8 9 10		
3. Employment Law Basics for Managers	1 2 3 4 5 6 7 8 9 10		
4. Preventing Workplace Sexual Harassment	1 2 3 4 5 6 7 8 9 10		

TRAINING MODULE EVALUATION FORM

Program: _____

Low High

1. REINFORCEMENT OF CULTURAL MESSAGES.

- a. Senior Management Strategy. 1 2 3 4 5 6 7 8 9 10
- b. Develop Sales Culture. 1 2 3 4 5 6 7 8 9 10
- c. Achieve Objectives for the Business Strategy. 1 2 3 4 5 6 7 8 9 10
- d. Multiple Initiatives. 1 2 3 4 5 6 7 8 9 10
- e. Core Competencies. 1 2 3 4 5 6 7 8 9 10

2. REINFORCEMENT OF BUSINESS IMPERATIVE

- a. Reinforce Business Reason. 1 2 3 4 5 6 7 8 9 10
- b. Solve Business Problems. 1 2 3 4 5 6 7 8 9 10
- c. Performance Standards Tied to Business Strategy. 1 2 3 4 5 6 7 8 9 10
- d. Cost Justification. 1 2 3 4 5 6 7 8 9 10

3. RELEVANCE TO THE JOB

- a. Tailored to Audience. 1 2 3 4 5 6 7 8 9 10
- b. Real Situations. 1 2 3 4 5 6 7 8 9 10
- c. Core Competencies. 1 2 3 4 5 6 7 8 9 10
- d. Appropriate to Career Stage. 1 2 3 4 5 6 7 8 9 10

4. FLEXIBILITY

- a. Effective Use of Time. 1 2 3 4 5 6 7 8 9 10
- b. Effective Use of Training Resources. 1 2 3 4 5 6 7 8 9 10
- c. Easy to Use for Network Trainers. 1 2 3 4 5 6 7 8 9 10
- d. Multiple Formats. 1 2 3 4 5 6 7 8 9 10

5. SOUND INSTRUCTIONAL DESIGN METHODOLOGY

- a. Business Strategy Context. 1 2 3 4 5 6 7 8 9 10
- b. Use of Consistent Models. 1 2 3 4 5 6 7 8 9 10
- c. Three Phases of Training. 1 2 3 4 5 6 7 8 9 10
- d. Well Documented Leader's Guides. 1 2 3 4 5 6 7 8 9 10
- e. Interactive Training. 1 2 3 4 5 6 7 8 9 10

Total Score _____

Comments: _____

Section Two

Course Listings

Management & Leadership

EXECUTIVE MANAGEMENT WORKSHOPS

MESD00 Strategic Implementation Plan Development Course

This course includes a systematic process for helping a team or executives construct a strategic Implementation plan for the business for a business unit. The team will work with the ten key elements to creating an effective culture from their strategic objectives. The module includes:

- The Ten Key Elements of Creating a Strategic Implementation Plan
- Systems Thinking
- Vital links to the corporate vision and mission
- Execution levels of the strategy

MCOE01 Developing and Communicating Your Vision, Mission & Strategy

This module focuses on the purpose of a vision and mission and demonstrates how they can be effectively articulated to all levels of the organization. The module demonstrates how to:

- Define a Vision and Mission
- Communicate the Vision and Mission
- Reinforce the Vision and Mission

MCOE03 Establishing A Philosophy of Organizational Excellence

This module focuses on the factors which contribute to organizational excellence, including:

- Constant pursuit of the customer
- Constant pursuit of innovation and improvement
- Constant contact with employees
- Management approach to encourage employee participation and involvement

MCOE02 Managing Change

This module explores the human response to change and teaches participants to anticipate other people's responses and better manage them through the change process. Module may include how to change aspects of the company by getting the right people to buy into the change. Participants will learn to:

- Recognize Responses to Change
- Identify Perceptions of Change
- Analyze and Prepare for Change
- Assist Others Through the Change Process

MCOE07 Strategic Management

This complete course begins with a look at Systems Thinking as it relates to global market changes and strategies that address the need for every type of business to think about change holistically. The course includes developing a culture and strategy for addressing essential business needs and the need for continual improvement. Participants will learn:

- Systems Thinking in addressing Strategies
- The ten key elements of change and culture
- Total Alignment of Business Strategies
- Addressing the People Factor
- Managing Change –corporate and individual

MANAGEMENT & LEADERSHIP WORKSHOPS

MYMR01 Accepting a Management Role

Making the transition into a management or supervisory position requires new behaviors, confidence and new skills. Often employees are expected to make the transition with out essential skills. This module provides insight on:

- Distinguishing between management and leadership
- Identifying leadership attributes of successful managers

- Assessing time management effectiveness

MPLM01 Recruit a High Performance Team

All too often employees are told to interview a candidate without any background or knowledge on procedures to follow, questions to ask, or an understanding of the legal implications of their conduct. This module reveals:

- How to establish hiring criteria
- How to screen and interview applicants
- How to determine the best fit

MPLM02 Orient New Team Members: Starting Off on the Right Foot

It is essential that new employees be given the attention and understanding they need to succeed on the job. Effective orientation can facilitate the employee's first weeks on the job and help to become an effective team member more quickly. This module helps participants:

- Develop orientation goals
- Set forth an action plan and timeline
- Use a checklist to assure continuous feedback and coaching

MPLM03 Train & Provide a Career Path: Charting the Course for Employee Development

Employee development involves establishing a plan for giving employees essential skills and knowledge. And, to maintain motivated employees, it is essential that they see a natural progression for their career. This module provides participants with insight into:

- The value of employee development programs
- How to set up mentoring, counseling and coaching sessions
- Providing the employee with career guidance

[See Performance Management](#)

PERFORMANCE MANAGEMENT WORKSHOPS

MPLM05 Motivate and Compensate: Linking Pay to Performance

Employees are more motivated when their pay is linked to performance. This is not always feasible in organizations, but many innovative means exist to incent and reward employees in an effective manner. This module covers how to:

- Apply the classical theories of motivation in a practical way
- Determine what motivates different personality styles
- Apply motivational theories to different team members

MPFM01 Roles and Responsibilities: Each Team Member is a Component in Achieving Goals

Teams function smoothly when roles and responsibilities are clearly delineated. Team members need to understand what is expected of them and how much authority they have to carry out a task. This module discusses:

- Ways to clarify roles using job descriptions and organization charts
- How to delegate effectively to team members

MPFM02 Standards & Objectives: Setting Verifiable Objectives with Employees

To gain commitment for achieving organizational goals, employees need to understand what is expected of them in a way that is meaningful to them on both a team and individual level. In this module, participants are given:

- Management tools of bench marking and best practices
- Skills in creating verifiable, meaningful objectives
- Recalibrating standards and objectives for changing times

MPFM03 Monitoring Performance and Providing Feedback to Employees

Tracking performance requires collecting data and measuring results. Some employees become frustrated when measured by sheer numbers. This module assures that all employees understand the key results to be measured and how they will be held accountable for results.

The discussion provides:

- Practice on providing feedback
- Skills in instructing and motivating staff
- Techniques for offering constructive, candid feedback

MPLM04 Plan and Appraise Performance: Tips and Tools for Effective Appraisals

Performance appraisals don't need to be painful for all concerned. When done well, performance appraisals provide employees, team members and management with constructive comments on how to work better together. This module includes a discussion on:

- 360 degree appraisals
- Ongoing coaching and counseling
- Legal implications of performance appraisals

MPFM04 Coaching for Optimal Performance

Developing employee skills requires an honest look at employee behavior and an ability to convey criticism in a useful manner. Coaching is often not done because managers assume that employees have knowledge and skills to do the job. This module gives participants:

- Useful methods of observing behavior
- Communicating frankly with employees
- Conducting feedback and coaching sessions

PERFORMANCE MANAGEMENT (Cont.)

MPFM05 Reinforce, Recognize and Reward Employee Contributions to the Team

Everyone wants to be appreciated for their contribution to the team, but cheer leading may not come naturally to managers. Understanding employee motivators and reinforcing positive behavior are keys to maintaining high morale and commitment from employees. This module provides insight into:

- Effective ways to reinforce, recognize and reward employee performance
- Extrinsic and intrinsic awards
- Determining what motivates individuals
- Innovative and practical means of recognizing employees

MSDP01 Self-Development Plans

Today's employees cannot expect lifetime employment. To be a viable team member, employees need to continually upgrade and fine-tune their skills to respond to the challenges in the competitive environment. This module teaches:

- How to accept responsibility for self-development
- Action plan for obtaining skills

MIPE01 On-the-Job Training: The Most Valuable Teacher is You

Technical aspects of the job are best taught with one-on-one training. This module provides instruction on how to teach co-workers processes and systems. The module shows:

- How to convey information for all styles of learners (visual, audible, kinesthetic)
- How adults learn
- How to summarize key points and conduct effective training sessions

MBLM02 Diversity: Understanding & Valuing our Differences

The workplace pulls together people from diverse backgrounds, education and cultures. Make certain that your organization values the differences in people with this training module. The module addresses an awareness and definition of diversity, as well as an appreciation for differences. Also included:

- Broad definition of diversity
- Need for open communications
- Avoiding preconceptions and prejudices

MBLM03 Working Together: Improving Relationships between Union and Non-Union Workers

Union and non-union members often have the same objectives, but sometimes conflict arises. This module helps participants learn:

- How to work together to solve the organization's problems
- Background on legal rights of union members
- How to gain support from union and non-union members

MBLMO4 Employment Basics for Managers

Managers and supervisors are directly responsible for the communications of many employee policies, but are rarely given any background information on the laws governing the workplace. This module provides insight on the various federal laws that impact management, including:

- Discrimination laws
- Workplace safety regulations

PERFORMANCE MANAGEMENT (Cont.)

MBLM05 Preventing Workplace Sexual Harassment

Sexual harassment creates problems for everyone involved. The best solution is to take proactive steps to eliminate sexual harassment. Training and communication are essential components of a sexual harassment prevention program. This module covers:

- Legal definition of sexual harassment
- Liability issues
- How to report a complaint of sexual harassment
- Case Studies: problem solving scenarios

MANAGEMENT TOOLS AND TECHNIQUES WORKSHOPS

MMT01 Do it Now! And Other Time Management Techniques

Everyone can stand some help in utilizing time more effectively. This course provides the techniques for minimizing wasted time and maximizing ROE -- return on effort. Participants learn:

- How to analyze time usage
- How to schedule, prioritize and set yearly, monthly, weekly and daily plans
- Suggestions for handling interruptions
- Delegating
- Streamlining paperwork

MMT02 Project Management: From Idea to Implementation

Even the best project managers can benefit from this module on effective project management. People can generally be put into two categories: those that are process oriented (operations, systems and accounting people) and project oriented (the big picture type). But project management means getting tasks done, requiring both sets of skills. This module reinforces:

- Systematic tracking techniques that keep projects running smoothly
- Managing a project from idea to implementation
- Using Gant charts, flow charts and other analytical tools

MMTT03 Meeting Management: Decisive, Involving Meetings in 30 Minutes or Less

Meetings in most organizations are time wasters, especially if an ineffective meeting facilitator is in charge. This module gives practical advice for productive meetings, for those that attend, and facilitate meetings. Participants learn:

- Understanding group dynamics
- Planning the meeting and setting the agenda
- Handling questions, negative reactions, and distractions

MPIQ01 Streamlining Business Processes

This module was designed for the business manager to improve and enhance his/her time and resource management skills. The emphasis on the course is on methods and techniques which will help the participant plan, direct, monitor, and control the activities of the business unit.

Includes:

- How to improve personal productivity.
- Plan and organize resources
- Dealing effectively with bureaucracy
- Approaches to Decision Making
- Streamlining with Technology

MIPE03 Understanding Profitability: Managing Like an Entrepreneur

Today's business managers need to exploit creativity and innovation and think like entrepreneurs in the confines of an established business. The module includes understanding key business ratios and financial statements (may be customized to your own operation). This module helps participants understand:

- How to run their departments or work units like small businesses
- Making financial and strategic decisions as if they owned the business.
- Becoming an effective, financially astute business manager

MANAGEMENT TOOLS AND TECHNIQUES (Cont.)

MPIQ03 Bench-marking Best Practices

One of the most useful tools in developing an efficient organization is to benchmark the practices of those companies that are doing the best possible job in that particular field. This module includes:

- How to conduct a benchmark analysis
- Steps to implementing a benchmark strategy in your organization
- Developing a benchmark questionnaire

MPIQ02 SO 9000 Certification

ISO 9000 is a world-wide organization for quality standards and certification. Certification is a comprehensive process that requires a substantial commitment. This module will inform the staff of ISO 9000 requirements and will highlight ways to incorporate the standards into your organization's quality process. By training employees with this module, they will be able to:

- Understand the value of ISO Certification
- Access the resources available through ISO
- Apply concepts of quality improvement, quality control, design, inspection, and control
- Conduct quality documentation and record keeping

MBLM01 Integrity and Business Ethics

It is essential that employees understand the organization's goals for integrity. Often standards of conduct are not communicated until a lapse in ethics occurs. Take proactive steps to assure that the integrity of your organization is not challenged. This easily adaptable module allows you to insert references to your code of ethics, policies, procedures, and legal requirements so employees understand how their conduct impacts your organization. This module includes a discussion of:

- Standards of conduct
- Ethics on and of the job
- Doing the right thing when confronted by a moral dilemma
- Your responsibility as a representative of the company

Section Three

Staff Development

STAFF DEVELOPMENT WORKSHOPS

WORKING IN TEAMS

MCFR01 Conflict Resolution

This module provides insight into your natural style of dealing with conflict, and provides measures for meeting conflict head-on. Text contains information on:

- Proactive problem solving
- Effective techniques for dealing with conflict.

MTD03 Encourage Improvement: Striving for the Best

Organizations interested in establishing a program of continuous quality improvement will benefit from the material in this module. This module teaches participants to look for ways to improve processes and systems in their daily work. The module includes:

- Brainstorming techniques
- Problem analysis tools
- Seeking out continuous quality improvement

MTD04 Creative Problem Solving with the 4-Step Process

Employees are often the best problem solvers -- they know the situations and see first hand the results of the problem. Involving them in the problem solving process and keeping them aware of how they impact the team can be a refreshing source of bright ideas. The four-step process includes:

- Identify the problem and the opportunity gaps
- Analyze the problem using data analysis and collaborative tools
- Generate and evaluate ideas and make a decision
- Decide on an Action Plan: Names, Dates, Details

MTD05 Team Work: Getting and Staying on Track

Effective team work means getting everyone on the same track. But unclear goals, undefined roles, interpersonal issues and other obstacles can impair a team's abilities. This module helps build an understanding of the team development process:

- How to get beyond the early development stages of team development
- How unclear roles, goals and procedures impact effectiveness
- Overcoming negativity, interpersonal issues and hidden agendas

MIPE02 Unleashing the Power of Employee Efficiency

Some employees have better concepts of effective time usage and run on different speeds. Efficiency is a skill that can be learned. In this module, participants learn to:

- Recognize opportunities to streamline functions
- Consolidate tasks for maximum efficiency
- Create more effective procedures

See Service Skills

Section Four

Customer Service Skills

CUSTOMER SERVICE SKILLS WORKSHOPS

MCSV01 Telephone Skills: Conveying Your Professionalism Over the Phone

Most of our communication with customers is done over the phone. It is difficult to convey your professionalism and credibility without the proper training. This module helps participants develop their telephone skills to enhance the exchange of information. The module reveals:

- Techniques for selling over the phone
- Communicating via voice mail and taking information over the phone
- Clarity, pace and pitch: Important Factors

MCSV02 A Positive Attitude: Your Best Asset

A winning attitude goes a long way with clients and co-workers. It can be argued that some people naturally have a positive attitude, and others must learn it. This module provides participants with an intrinsic sense of pride for themselves, their team and the organization, which lends itself to a positive outlook. The discussion includes:

- Exercises that foster positive attitudes
- Ways to display your positive attitude to co-workers and clients

MCSV03 Conveying Your Knowledge of Product Features and Benefits

Providing superior customer service requires knowledge of your product and the ability to distinguish it from your competition. This module discusses the importance of knowledge, including:

- Product Knowledge
- Operational Knowledge
- Service Knowledge
- Sales Knowledge

MCSV04 Identifying Customer Expectations: The First Step to Serving Your Customers

Discover what your customers really want and meet their expectations with the utmost confidence. The purpose of this module is to help participants understand the effect that expectations have on perceived quality, performance, and self-esteem. Participants will be able to discuss the various expectations that others have and the challenge of meeting those expectations, as well as tools and techniques to meet expectations more effectively. The following areas are covered in the module:

- Defining Customers
- Defining Customers' Expectations
- Discovering Expectations
- Building Lasting Relationships

CUSTOMER SERVICE SKILLS (CONTINUED)

MCSV05 Your Role in Delivering Excellent Service

Supporting customers occurs both internally and externally of the organization. Understanding one's own behavior and the effect it has on others can help to identify and practice dealing with conflict and problems that may arise. The module addresses the following service skills essential to providing high quality service to "customers".

- Attitude
- Efficiency
- Knowledge
- Communication
- Appearance

MCSV06 The Service Profit Chain

This session presents a model of how profitability is affected by service quality. During this session we discuss all the issues that lead to a high performance service culture and how to set up a culture within an organization.

- The Service Profit Chain
- Building a Service Culture

MCOE04 Overcoming Negativity in the Workplace

The key to obliterating negativity in the workplace is to understand the underlying problems of how people react under pressure. The objectives of this module are to:

- Uncover the roots of the negative behavior
- Take steps to improve the situation
- Coach negative behavior using the 5-step process

MTD02 Empowerment: Giving and Receiving Responsibility for Getting the Job Done

With today's unstructured organizations, giving responsibility and accepting it are challenges. But with the right skills, employees can become active participants in taking on responsibility, not just waiting on the side-line for directions. This module teaches:

- Accepting and giving power
- Managing up
- Individual decision-making
- Taking initiative and responsibility for the job

MTD01 Encourage Innovation: Your Brightest Ideas at Work

How do organizations create an innovative environment? By fostering creative thinking and recognizing and rewarding innovation. This module helps teams to take the leap into a more innovative mode of operation. Discussion includes:

- Thinking outside the nine dots
- Sources of innovation
- Creative Problem Solving

COMMUNICATION SKILLS WORKSHOPS

MCOM01 Communication Skills

Overcoming the barriers to effective communication can result in saved time and effort. Employees get more done faster when the lines of communication are open. This module includes:

- Reading verbal and non-verbal clues
- Improving telephone, written and face-to-face communications

MCMS01 Effective Listening for Improved Communication

This module provides information on:

- Impact of communication breakdowns
- Active listening: take notes, restatement, questioning
- Reading verbal and nonverbal clues
- Avoiding preconceptions and prejudice

MCMS02 Strategies for Interpersonal Relationships: Understanding and Adapting to Different Personality Styles

Teams often fall apart because of miscommunication, misunderstanding and misinterpretation of information. But if employees understand the personality profile of another person, they are better equipped to respond to that person in ways that are more meaningful. This module focuses on:

- The classical theories of organizational scientists
- Stress points, needs, motivations and attributes of each style
- Analyze yourself, CO-workers, partners and other individuals
- Better understand the intricacies of human behavior

MMTT04 Presentation Skills: Techniques for Skillful Presentations

Fear is the common reaction when asked to make a presentation or make a speech in front of colleagues or other groups. The experience should be positive and an effective way of persuading the audience and garnering support for your cause. This module includes:

- Practice in making professional presentations
- Getting over fears and apprehensions
- Techniques that professional speakers use
- Tips on using audio/visual aids, flip charts and overheads

Section Five

Sales and Marketing Programs

CONSULTATIVE SELLING SKILLS WORKSHOPS

Consultative Selling Skills is a multiple-module course which practices the fundamental process of developing customer selling relationships. This multiple day workshop may include the clients own business growth strategy, competitive strategies, case studies, role plays and products. Included are these six modules:

MAAP01 Prepare: Information and Tools for Conducting an Effective Sales Call

In this module we discuss the process and techniques of preparation. We consider methods for developing background information on our customers. We identify good sources of information, and we discuss the role of objectives and product pieces in preparation.

MCSS01 Relate to the Client: Keys to Developing Rapport, Credibility and Trust

First impressions are lasting impressions. The ability to communicate effectively will determine future potential business and is fundamental to maintaining lasting relationships with clients. They need the assurance that your knowledge and capability cannot be surpassed by the competition. This module emphasizes:

- Communication techniques to project a positive image
- Building in-common connections
- Creating a comfort zone between you and your client

MCSS02 Discover Client's Needs: Questions to Ask to Better Serve Your Client

Clients and customers expect you have all the answers. Asking appropriate questions, actively listening, and knowing your product are all key elements in determining whether your customer has needs you can serve. By addressing concerns and problems, you can offer the best solutions. This module covers:

- The purpose of questioning
- How to ask questions to focus the customer and uncover specific product needs
- Techniques for active listening
- SPIN Techniques to questioning

MCSS03 Present Solutions: Features and Benefits of Your Product

Does the customer understand why your product is the best on the market? Do you have proof to back your statements? A customer must be assured that you have offered the best solution. This module demonstrates:

- Linking features and benefits
- The importance of obtaining customer feedback
- Appropriate actions for gaining customer commitment
- How to make a high impact presentation

MCSS04 Resolve: Overcoming Objections, Answering Questions and Resolving Issues

Turn issues into opportunities! Client / customer objections don't have to be negative - use them to explain the benefits of your solution. This module teaches:

- How to recognize objections (both verbal and non-verbal)
- How to distinguish what the objection really is
- Effective techniques for handling objections
- The LEAP approach.

CONSULTATIVE SELLING SKILLS (Cont.)

MCSS05 Take Action: Persuading the Client to Say Yes!

Asking for business isn't always easy. Natural fears of rejection or failure, or uneasiness with a customer may prevent closing the sale. This module reviews:

- Common obstacles to closing
- Proven techniques to confirm the customer's willingness to buy
- Recognizing and handling buying and danger signals from customers

ACCOUNT ANALYSIS AND PLANNING WORKSHOPS

Module Overview

The program is divided into the following modules, with each module focusing on a separate skill in account analysis and planning. This program is primarily for those engaged with major accounts such as Commercial Lenders, High Technology, Pharmaceutical or other complex sales.

The Challenge

This introductory module introduces the Account Analysis and Planning Workshop. We discuss the concept of relationship selling. We look at market segmentation strategies and selling to key customers. We discuss the importance of planning in building a long-term account relationship.

MAAP01 Prepare

In this module we discuss the process and techniques of preparation. We consider methods for developing background information on our customers. We identify good sources of information, and we discuss the role of objectives in preparation. We work with a case study client situation taken from real life, and use the information to build a relationship plan - just as we would with one of our own clients.

MAAP02 Analyze

In this module we discuss a step-by-step process for analyzing clients. We examine techniques for gathering and organizing personal background, and background on our relationship with the client. We discuss the process of identifying basic needs, selecting priority needs and matching these with products and services. We introduce and work with a key worksheet used in account analysis - the Service/Product Analysis and Action Plan. We also discuss the decision process - determining who are the decision makers and influencers, and what criteria they will use in evaluating our proposals and in making the decision. Finally, we examine the process of selling from competitive strength by trying out techniques for identifying our advantages and disadvantages, and developing appropriate responses to these opportunities and challenges.

MAAP03 Strategize

In this module we discuss the key elements of a relationship strategy, using the Service/Product Analysis and Action Plan as our primary tool. We concentrate on its main categories: Client Background and Relationship Information, Overall Strategy, Priority Needs and Products, Decision Process Strategy, Competitive Strategy, Resources Planning, and Implementation.

MAAP04 Organize

In this module we discuss the organization required to systematically build and maintain long-term client relationships. The four basic areas of discussion are the resources we need, the development of a resource plan, the team building, and team selling.

ACCOUNT ANALYSIS AND PLANNING (Cont.)

MAAP05 IMPLEMENT

In this module, we discuss the "action items" necessary in building profitable, long-term client relationships. We speak of it as "Implementing Client Strategies." This means applying the sales process systematically. Among the key topics: setting objectives for the relationship, establishing a personal and professional connection with the customer, discovering customer needs, making persuasive presentations, resolving objections and overcoming barriers to the sale, and closing the sale using confirming techniques. We review the three elements of successful client relationship building - your image, your knowledge, and your ability to apply the skills of Consultative Selling.

MARKET ANALYSIS AND PLANNING

Market Analysis and Planning is a five-module course that covers the essential steps of developing and implementing an effective marketing plan, primarily for Bankers. Included are these modules:

MMAPO1 Develop a Marketing Plan: Your Plan of Attack

This module helps participants:

- Research their plan of attack on the marketplace
- Write a success-oriented marketing plan
- Track results and take corrective action

MMAPO2 Analyze Your Marketplace: Understanding Your Competitive Position

This module reveals how to:

- Collect information
- Compare and contrast your product
- Clearly define your product's competitive advantage

MMAPO4 Warming up Prospects: Beyond the Cold Call

This module covers:

- Techniques for organizing and processing prospect names•How to work with in-house prospect lists
- Action plan for developing a prospect list

MMAPO5 Marketing By Mailing: Effective Communications with Prospects and Clients

This module covers these techniques:

- Using marketing letters in a mail campaign
- Developing a library of standard letters
- Streamlining the mailing process using software, assistants, and mail houses
- Planning and executing your mailing campaign

MMAPO6 Control Marketing Results: Getting the Marketing Results You Need

This module explores:

- Measurement and tracking
- Response rates, campaign effectiveness and other indicators
- Testing and fine-tuning your marketing campaign

NEGOTIATING SKILLS WORKSHOPS

MTT05 Effective Negotiating Skills

A fundamental skill that every business person needs to position themselves for conducting sales processes, mergers, employment contracts and many other critical processes to produce results. This is a powerful seminar that can be extended to include role plays and clients own negotiation strategies and products.

This module is a one or two day seminar that includes:

- Define Strategy and Tactics
- The Purpose of a Negotiating Strategy
- Your Negotiating Agenda
- Negotiating Ground Rules
- Tactics for Negotiating

SALES EFFECTIVENESS SKILLS WORKSHOPS

MCSS07 Time and Territory Management Techniques

Everyone can stand some help in utilizing time more effectively. This course provides the techniques for minimizing wasted time and maximizing ROE -- return on effort. Participants learn:

- How to analyze time usage
- How to schedule, prioritize and set yearly, monthly, weekly and daily plans
- Suggestions for scheduling sales appointments
- Setting a Plan for Improving Sales Effectiveness

Section Six

Training Methodologies and Approach

THE MERIT APPROACH TO DESIGNING A COMPLETE CLIENT CURRICULUM

Merits specializes in the design and implementation of specific strategies for improving performance. Our approach to designing a complete curriculum for a client is based on the premise that the best way for organizations to become more productive and profitable is to build value from within. We believe that organizations can build value from within by focusing on three important technologies:

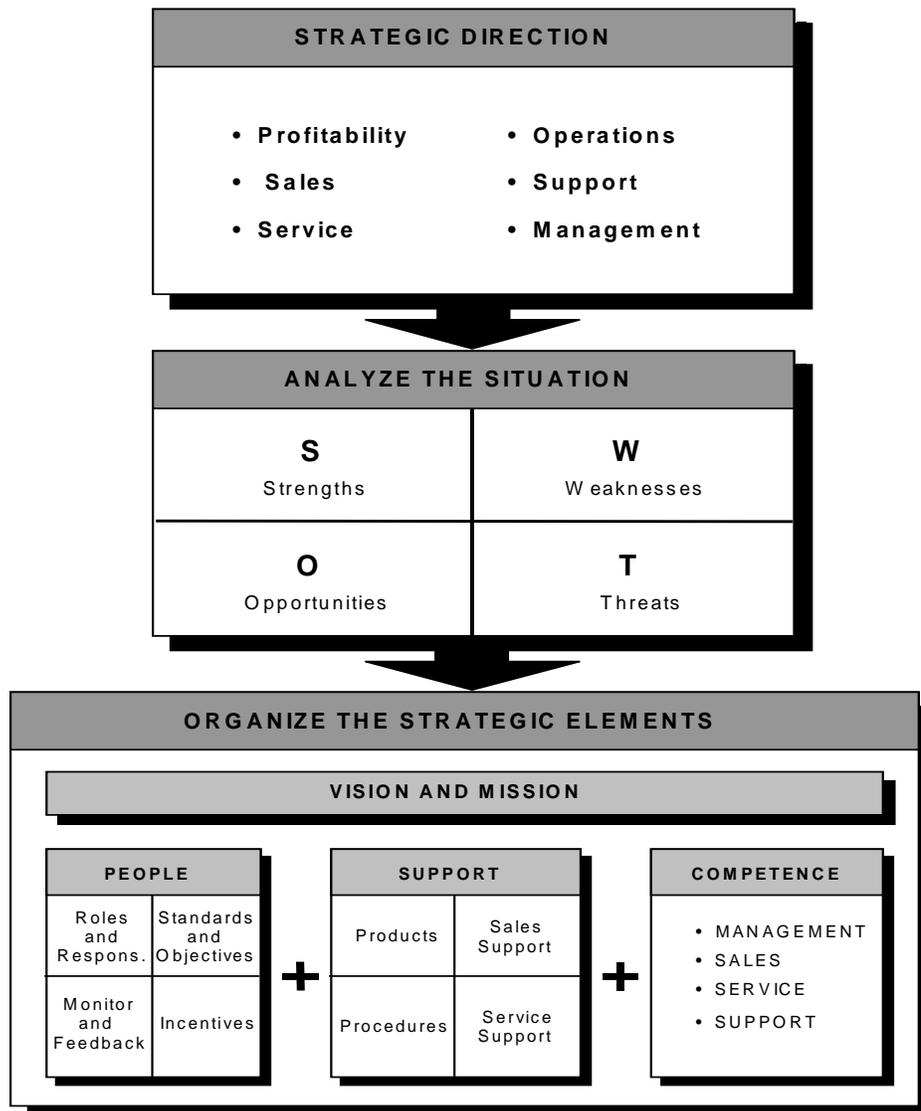
1. **Strategy Implementation Technology: Purpose, Vision, Mission, and Corporate Values** that encourage and reinforce motivation, commitment, and teamwork.
2. **Employee Development** approach that focuses on enhancing critical knowledge, skills, and attitudes that provide employees with a competitive edge, as well as personal and professional growth opportunities.
3. **Process Technology: Corporate Systems** that encourage innovation, growth, and profit.

FOCUS ON “YOUR” SPECIFIC CULTURE

Our experience has taught us that in order to enhance corporate cultures and implement a strategy, which focuses on improving sales and/or production and service, ten key elements need to be in place. These are critical areas on which you will need to focus in order to make this transition. They are also the elements around which to build a complete Sales and/or Service Curriculum.

These elements are divided into three strategic areas:

- ◆ The Company Strategy for Change.
- ◆ The People Factor – How the changes affect the people and their roles, standards of behavior and motivation for change; and the Competencies they need to be successful, including personal leadership skills.
- ◆ The Systems and Processes for Supporting the new Strategy



TACTICAL SUCCESS FACTORS

Even when an organization comprehensively addresses all of the Ten Key Elements, the task of successfully shifting the corporate paradigm is only beginning. There are several important factors surrounding the system-wide implementation, which are the key to making the transition work.

Training Must Address The Ten Key Elements. The training for each audience should include specific reference to your company's ten strategic elements and how they apply at the individual employee's level and to their specific job.

Training Must Be Totally Relevant and Ongoing. Just as the change process will not be a three or six months task, neither is the change at an individual level a three or six day task. Any training system must include elements that apply in a variety of ways and over months in order to impart the knowledge, transfer the skills, and foster the "attitude change" necessary for long-term success.

Employees Must "Feel Ownership" to Put Principles into Practice®. For maximum effectiveness the training must be vertically integrated and provide for a top down implementation . . . each level of personnel connecting throughout training to their managers and subordinates. All programs must be specific to your organization and the employees' actual jobs.

MERIT CONCEPTS

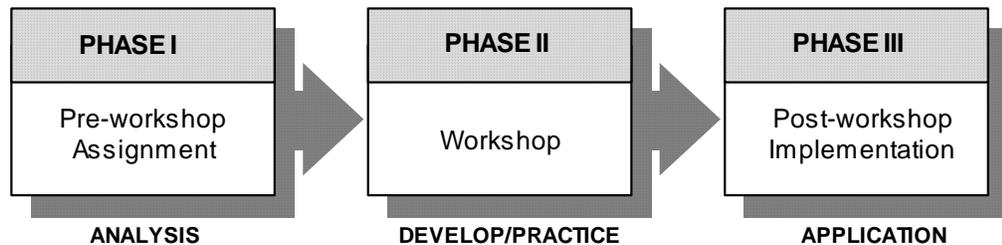
WE BEGIN FROM WHERE YOU ARE

Our approach is to develop our curriculum around a situation today and where you want to be tomorrow. You will be able to take advantage of the best of existing programs, processes, and skills. Whatever steps have already been taken within your existing "programs" will form part of the foundation rather than be discarded.

TRAINING METHODOLOGIES

THREE-PHASED APPROACH TO EACH PROGRAM

MERIT always recommends the use of a three-phased approach. The graphic below illustrates this three-phased approach.



THREE-PHASED APPROACH

- **Pre-workshop Assignment.** A pre-workshop assignment package sets the stage, gets the participants thinking about the content before the workshop, orchestrates management interface prior to attendance, requires some preparation, and insures a similar level of understanding to begin the workshop experience. Assignments may include:
 - Assessment of present skills
 - Develop a profile on an existing client
 - Determine an area of the business that should be improved
- **Workshops.** The workshops themselves focus on the types of material that require group interaction and/or supervised practice for maximum benefit. The key elements are sharing of information and ideas among peers and skill practice to insure learning. Our approach is to have people experience the skills by creating a true “Learning Environment”, rather than “teach” the skill through lectures and presentations. As such the workshops include such learning technologies as:
 - Roles Plays
 - Case Studies
 - Real Life Examples
 - Group Presentations
 - Individual Exercises
- **Post-workshop Implementation.** New Skills and Behaviors are introduced in the workshop, but the changes of behavior are made over time and practice. Therefore the technology used by MERIT includes a series of post-workshop implementation and application of the skills/concepts orchestrated by a series of Post-workshop Action Items, which include a management/subordinate interface and practice, so that the concepts are applied and the objectives are achieved.

LEADER/TRAINER CURRICULUM

The MERIT approach includes a method of building an internal team of Leader/Trainers who can “champion” a comprehensive program, and provide continuous low cost training far into the future.

In addition to completing their respective skill curriculum, Leader/Trainers have two to three additional days of leadership and facilitation skills directly connected to the program they will teach.

DEVELOPMENT OF LEADER/TRAINERS

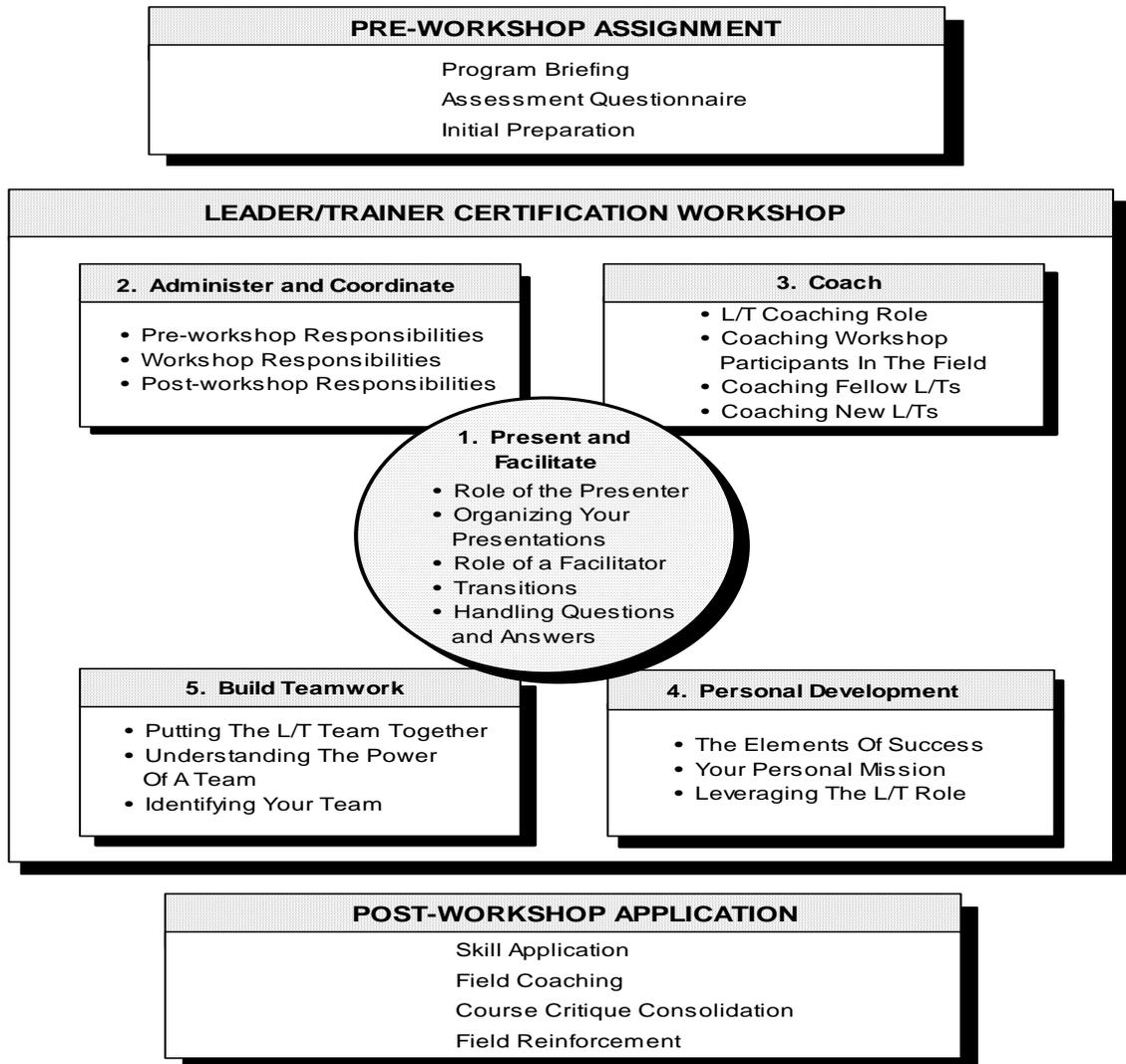
It is difficult to overstate the value of including some field personnel in the MERIT Leader/Trainer Certification Program. IBM has long used the Leader/Trainer role as a developmental step for their personnel with the aptitude and potential. We have found that this concept applied in organizations has immediate and lasting benefits:

- **Credibility.** The training is coming from peers or the next level of field management. These individuals know the jobs of their students and believe in the processes and skills being taught.
- **Lasting Application.** Rather than having outsiders deliver the training and then go away, your company will be left with an internal resource, the leader/trainers, who can continue to reinforce and promote the new culture in their own work units and throughout their peer groups. Some individuals will want to be involved in the ongoing implementation with new hires, promotions, and/or acquisitions. The momentum is powerful.
- **Personal Development.** The individuals who are selected and developed as Leader/Trainers will grow immeasurably and multiply their contributions to you in a wide variety of ways throughout the organization.

LEADER/TRAINER CERTIFICATION

Program Purpose. The purpose of the Leader/Trainer Certification Workshop is to provide the participants with the knowledge, skills, and attitudes they will need to conduct an effective workshop. The process used in the workshop has two major areas of focus: (1) instilling an understanding of the program participants will be teaching from the students point of view; and (2) developing both the presentation and facilitation skills to enable them to run a highly interactive workshop. Once they have run a successful workshop, they will be certified to continue to train additional employees. The specific skills emphasized include presentation and facilitation skills, administration and coordination, coaching, personal development, and teamwork. Mastery of these skills, along with the experience of teaching these workshops, will significantly enhance their leadership capabilities, as well as place them in a position in their organization as internal “champions” of the concepts and skills they are teaching.

Target Audience. The workshop is designed for individuals who have been selected to be Leader/Trainers for a MERIT Program.



MERIT TAILORING AND CUSTOMIZATION APPROACH

THE MERIT BASELINE CONCEPT

The MERIT Baseline concept is a strategy to produce high quality training materials that can be adapted quickly to meet the needs of our clients. The Baseline is a basic core or foundation that can be built on simply and quickly to produce industry and client specific products.

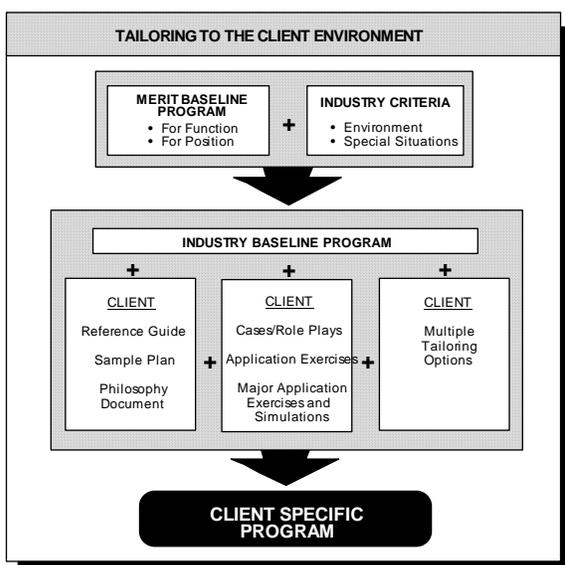
The Baseline strategy provides the client with materials that have been developed and proven over time. These materials can be delivered with varying levels of industry and client specificity. Baseline cuts the costs of customization for clients while still providing a highly tailored product. This approach allows MERIT to leverage off of expertise gained in previous projects and greatly increases MERIT's capabilities for rapid turnaround.

APPLYING BASELINE TO FUNCTIONAL AREAS AND SKILL BASED PROGRAMS

The MERIT Baseline program applies to functional areas such as sales or management and to skill based programs such as face-to-face selling or strategic selling. Baseline is designed for cross-industry use. Most companies require the same basic skills. However, to make the training truly effective, the training of these skills need to be adapted to the customer and product context of the trainee. MERIT has proven programs for many functional areas and skill sets, such as internal and external management, sales and service.

TAILORING TO THE CLIENT ENVIRONMENT

MERIT has developed a systematic process for tailoring skill-based programs to the client environment. The appropriate skill based program, such as Consultative Selling Skills, is selected. It is then adapted to the industry environment. It is then further tailored to the specific client situation through the addition of a client strategy and/or philosophy document; client cases situations, role plays and application exercises; and the selection of various additional tailoring options selected from the list of tailoring options designed for the program. The chart below outlines the approach.



The Baseline approach produces a client specific product. Delivered books and programs directly address the clients needs and interests. MERIT has already developed the programs to be offered as Baseline books. They cover functional areas and specific skill based programs. The final product delivered to a client includes the baseline programs tailored to the client's particular situation.

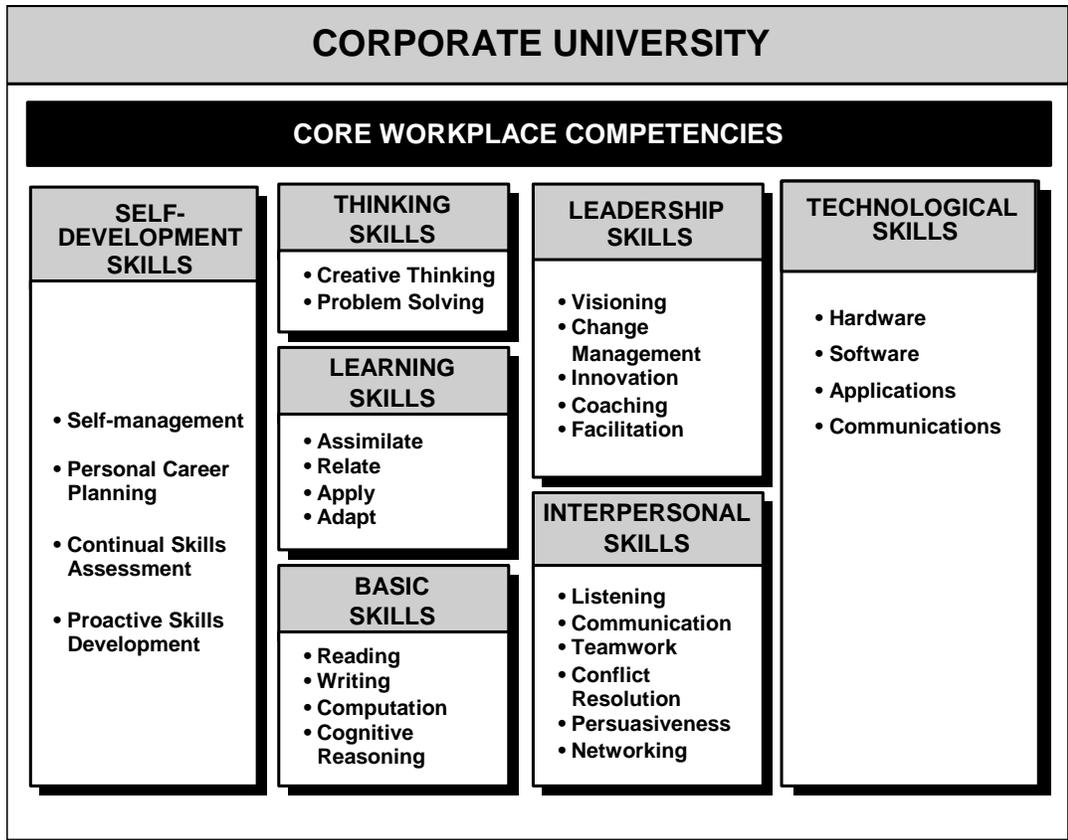
Section Seven

Building a Learning Culture

THE UNIVERSITY APPROACH

The University Approach to Building Core Competencies is available by your request. For a Complete Guide to Building a University (Continuous Learning Environment) Approach - Contact MERIT for a free consultation and 64 page information package at:

E Mail: www.merittrainingcorp.com or (757) 546 7703



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