

BOXERADVISORS
Translating Insights Into Action

2023 COURSE CATALOG

Boxer Advisors, LLC
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Website: BoxerAdvisors.com



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OVERVIEW

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Corporate Information

- Small business with over 25 years of consulting, coaching & training
- 30+ certified OD consultants, coaches & trainers
- Over **100** standard training offerings
- Support to over 50+ Federal agencies and Fortune 1000 companies
- 80% repeat business

NAICS CODES

309112	423430	424120	518210
519190	541199	541490	541611
541612	541690	541930	541910
541990	561320	561410	561440
561499	561990	611420	611430
611699	611710	624310	

DUNS: 079087954

Contract Vehicles (Subcontractor)

GSA Schedule Contract #GS-23F-9783H
OPM TMA Contract #OPM19-12-C-0046
HCATs

POC

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Call us today to discuss how we can help you
Translate Insights into Action.

Boxer Advisors, LLC is a Maryland based, small business engaged in providing leadership development, organizational development and employee engagement consulting, coaching, and training services to Fortune 1000 companies and Federal agencies. We are a full-service firm that combines the resources and expertise of more than 50 professional consultants, facilitators, and coaches. Collectively, our carefully selected partners have decades of experience providing consulting, coaching and training services.

EXPERTISE

As a boutique consulting firm, Boxer Advisors offers a comprehensive **single source solution** for addressing clients' needs. We are equipped to help organizations strengthen their capabilities, develop their efficiencies, and energize their workplaces by teaching the skills that drive collaboration, strong execution and productivity. Our team of highly specialized professionals bring strong, in-depth experience to our core capabilities including:

Human Capital Consulting

- Building Strategic Partnerships
- Change Management Services
- Communications Consulting
- Core Competency Development
- Organizational Development
- Strategic Planning
- Team Building Services

Coaching and Facilitation Services

- Executive Coaching
- Action Learning Coaching
- Meeting Design and Facilitation
- Seminars and Retreats

Professional Development Training

- Career Development
- Communication Skills
- Engagement and Retention
- Instructional Design Services
- Individual and Organizational Assessments and Tools
- Leadership Development
- Mentoring

Measurement and Benchmarking

- Best Practices Research
- ROI Assessments
- Measurement Tools

PAST PERFORMANCE

Boxer Advisors brings superior performance and expertise in providing consulting, coaching and/or training solutions to over 50 Federal agencies and Fortune 1000 companies including the following select clients:

- BAE Systems
- U.S. Centers for Medicare & Medicaid Services
- City of College Park, MD
- U.S. Department of Agriculture
- U.S. Department of Education
- U.S. Department of Energy
- U.S. Department of Health & Human Services
- U.S. Department of Labor
- U.S. Environmental Protection Agency
- Federal Aviation Administration
- Food and Drug Administration
- Intelligence Community
- Inter-American Development Bank
- National Aeronautics and Space Administration
- National Institutes of Health
- National Security Agency
- Patent and Trademark Office
- The World Health Organization
- The World Bank Group
- U.S. Coast Guard
- U.S. Patent and Trademark Office



CORE COMPETENCIES

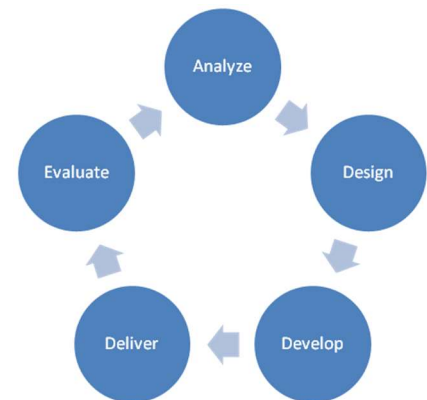
- **Instructional Design** – Apply instructional design models to create learning products for delivery in formal and informal settings including virtual training and facilitator-led training.
- **Training Delivery** – Provide trained and certified instructors adept at facilitation and adult learning methodologies.
- **Change Management** – Performance improvement and effective communication techniques for navigating challenges and obstacles impacting organizational change.
- **Project Management & IT Project Management**—certified by PMI.
- **ITIL (IT Infrastructure Library)**—all courses
- **Performance Improvement** – Certified Lean & Six Sigma practitioners enhance organizational performance.
- **Evaluating Learning Impact (Kirkpatrick Levels 1-4)** – Assess the effectiveness of current learning products, training materials, and staff, and make recommendations for improvement.
- **Coaching** – Expert facilitators certified SMEs in coaching and facilitation skills.
- **Virtual Learning** – Active Initiatives in DOD & civilian federal agencies.
- **Strategic Planning** – On- and off-site strategic planning sessions facilitated by our experts.
- **Acquisition/FAC-C COR Level I-III & FAC-P/PM Level I-III**
- **Special Certificate Programs** –training programs using a blend of online and in-class resources



TRAINING CAPABILITIES

Our team offers a comprehensive **single-source solution** for addressing our clients' training and development needs. We make it easy for our clients to offer the best possible learning experience and to leverage that experience across multiple courses. Our philosophy is simple: we believe the goal of every training program should be to improve the performance of an organization by improving the capabilities of its people. We don't teach theory; we teach skills. Each training program uses the most up-to-date techniques, including inquiry-based learning, to build practical and repeatable skills and competencies. Part of our customization process is to use situational examples taken from the learner's own environment to ensure the core training reflected in our materials is easy to understand and immediately applicable.

Our instructors are experts in adult learning methodologies and the key differences in learning styles, which may be generational, technical or behavioral. Each workshop is designed to allow participants to bring their own style and experiences to the classroom. These experiences help shape relevant examples, engage and encourage participants to contribute, and assist in honing the application of specific skills to improve their daily work. They create each learning experience using a structured five-step design process to ensure the best possible fit with client expectations.



Step One: We take special care to first **analyze** the course requirements and expected outcomes by speaking with project sponsors and participants, to develop material targeted to client-specific needs.

Step Two: We **design** the course work, typically taking existing material, and modifying it to meet client-specific needs. This may involve creating hybrid lesson plans and taking the best from more than one source. In this step, we also design the course evaluation materials used at the end of each training/project. A rigorous design phase ensures there are no surprises, and each training experience meets or exceeds client expectations. Each design phase includes input from the client and final approval of the material by the customer.

Step Three: We **develop** the course materials. This involves the creation of any required custom content and the production of the final course materials. Each deliverable is produced to meet rigorous internal quality standards as well as client-specific requirements.

Step Four: We **deliver** each program per the agreed upon work plan and schedule. Our workshops and training programs can be tailored to be delivered on-site, off-site, remotely via web and teleconference or a combination of all three.

Step Five: We **evaluate** the results and outcomes of each program to ensure it fully met client objectives. Our evaluation process incorporates anecdotal data gathered by the instructors and end-of-day participant feedback. Our comprehensive evaluation processes assesses whether the training delivered the expected results, identifies opportunities for further tailoring, and recommends follow-up actions to reinforce the material learned or address any gaps that may have been identified.



TRAINING EXPERIENCE

What follows is a sampling of training services provided consultants affiliated with Boxer Advisors.



Talent-Management and Employee Engagement

Provided training to help managers more effectively retain and develop top talent and training to help employees take more responsibility for their own career satisfaction and enhance their influence skills. Two hundred (200) managers attending these sessions reported more than 400 follow-up conversations with employees within six weeks of attending the workshop. One unit within the client organization reports an increase in employee satisfaction as a result of the training and other project activities.

Leadership Development

Designed and developed competency-based leadership development training to ensure the agency has a skilled, motivated, and highly committed workforce. Over 300 headquarters' employees and another 200 regional employees received training in 6 core competencies. Trained almost 1,000 managers in six (6) core competencies. Training yielded a 6.5-fold return on investment. In other words, for every dollar spent, the training yielded an average of \$6.50 in return.

Influence Skills Training

Conducted influence skills training during a 4 ½-day "freshman orientation" session for new salespeople. Designed communications training, specific to client, highly interactive, and matched directly to improve the skill set required for success in the field. Conducted seven workshops over a 3-year period. Client was able to document several hundreds of thousands of dollars in either cost savings or increased revenues.

Career Development Training

Worked with Fortune 1000 corporation to address their employee satisfaction challenges. Conducted train the trainer courses for 21 trainers and training for thousands of managers and/or employees. Designed and implemented a corporate-wide online Learning Center that served as a clearinghouse for all learning and development resources. As a measure of the initiative's success, during the period of performance, the organization increased their rating in the Fortune 500 best company by over 100 points.



HOW TO ORDER

We offer over 100 off-the-shelf courses and have years of experience designing training that meet the needs of our clients. In this catalog you will find a sampling of our off-the-shelf training courses. If you would like to order one of our workshops or if your organization has identified a training need that is not addressed in our catalog, please contact us!

CONTACT INFORMATION

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PROFESSIONAL/PERSONAL DEVELOPMENT TRAINING OFFERINGS

Acquisition & Procurement

- Acquisition & COR Certification
- Basic Contract Administration
- CON 100, CON 170, CON 260, CON 270, CON 280, CON 290, CON 360 & other required DAU courses
- Contract Law for Non-Lawyers
- COTR/COR Certification courses (5 days)
- COTR/COR BASICS Course (3 days)
- COTR/COR Refresher (1 day)
- Ethics in Procurement/Contracting
- Evaluating Technical Proposals
- Grants Management
- Government-wide Purchase Card
- Independent Government Cost Estimating
- Writing Effective Statements of Work
- Fair and Reasonable Pricing
- Perf-Based Acquisition
- Perf-Based Management Contracting
- Basic COR
- Contract Management for "Techies"
- Contracting for Research and Development
- Negotiation Skills for COR's
- COR Training Refresher
- Government Contract Law
- Types of Contracts
- Federal Acquisition
- Planning and Managing Major Asset and Systems Acquisitions
- Contracting Officers Representative

Appropriations Law

- Advanced Appropriations Law - DOE
- Appropriations Law for Reimbursables and Working Capital
- Federal Appropriations Law
- Federal Appropriations Law Review
- The FAR and Federal Appropriations Law
- Appropriations Law Seminar
- Fed Appropriation Law Mastery
- Intro to the FAR

Assessments

- DISC
- Myers-Briggs Type Indicator (MBTI)
- EQi 2.0

Financial Management & Retirement Planning

- Early-Career Retirement
- Pre-Retirement Planning Seminar
- Mid-Career Retirement Planning Seminar
- Late-Career Retirement Planning
- CSRS Retirement Seminar
- FERS Retirement Seminar
- Preparing for Life after Retirement
- Executing Your Financial Strategy and Introduction to Estate Planning
- Using Behavioral Finance to Build a Stronger Future
- Women and Their Money
- Understanding Investments and the Markets
- Financial Decision-Making and Intro to Investments
- Stock Market Investing and Retirement Planning

Change Management

- Building Acceptance and Overcoming Resistance
- Change Management
- Foster Better Decision-Making
- Leading Change Incorporating Strategic Planning and Emotional Intelligence
- Organizational Change Training
- Managing Change and Transition
- Successful Decision Making
- Organizational Change Training
- You Can Be a Change Agent
- Change and Transition Management
- Changing Dimensions of DOE

Coaching

- Building Your Brand
- Coaching Skills for Everyone
- Coaching for Performance
- Leading by Coaching: Developing and Enhancing Performance 24/7

Communication Skills

- Advanced English for Non-Native Speaking Professionals
- Business Correspondence
- Communication Skills for Teams
- Conducting Effective Meetings
- Crucial Conversations®
- Crucial Conversations for Mastering Dialogue v5 Classroom
- Crucial Conversations for Mastering Dialogue Add On v5
- Crucial Conversations for Accountability v5
- Crucial Conversations for Accountability Add On v5
- Effective Communication Skills
- Effective Briefings
- Executive Communication and Influencing Skills
- Executive Communications
- Exercising Influence
- Relationships and Getting Results
- Facilitating Successful Meetings
- Presentation Skills
- Facilitation Skills
- Team Communication Skills
- Business Writing
- Writing for Success
- Writing Skills: Proofreading, Grammar, Professional Writing
- Preparing and Delivering Executive Briefings
- Presentation Skills for Professionals
- Train-the-Trainer (Creative training designs and games for accelerated learning)
- Are You Drowning in Email? How to Control Your In-box Instead of Being Controlled by it?
- Email Etiquette – 25 Rules for Courtesy, Clarity, Coherence & Tact that Will Get Your Message Read & Acted On
- How to Write Clear, Concise, Actionable Emails
- Email Etiquette
- Positive Workplace Communication
- Working Magic with Language
- iLoveFeedback®

- Effective Communications using Wiley's
- Fostering Civility in the Workplace
- Clear Communication
- Persuasive Legal Writing and Reasoning

Conflict, Negotiation & Mediation

- Achieving Results with Stakeholders
- Alternative Dispute Resolution (ADR)
- Conflict Resolution Strategies
- Constructive Negotiation
- Creative Problem Solving
- Dealing with Difficult People
- From Conflict to Collaboration: Resolution Strategies
- Preventing Workplace Violence
- Moving From Conflict to Collaboration
- Negotiation & Influence (“Getting to Yes”)
- Problem Solving and Analytical Thinking
- The Problem-Solving Workshop
- Resolving Conflict
- Conflict Management and the TKI Conflict Mode Instrument
- Productive Conflict
- Best Negotiating Practices
- Facilitating Conflict Resolution
- Negotiation Strategies and Techniques
- Turning the Table on Conflict
- Constructive Negotiation

Customer Service

- Customer Service Excellence
- Service Excellence
- Customer Service Training
- Customer Service
- Trustworthy TM Customer Service

EEO Essentials, Diversity & Inclusion

- Diversity & Inclusion Best Practices
- Moving Beyond Bias
- Unconscious Bias Organizational Assessment
- Understanding Diversity: Differentiating
- Recognizing & Overcoming Gender Bias in the Workplace
- Unconscious Bias: Its Organizational Impact
- Understanding the Cost of Workplace Bias & Bullying
- Leveraging Diversity
- Understanding, Recognizing and Valuing Diversity

- Communication Skills in a Culturally Diverse Workplace
- Generational Differences
- Engaging and Inspiring Millennials

Financial Management

- Budget Analysis Workshop
- Budget Execution
- Budget Formulation
- Budget Justification & Presentation
- Effective Contract Negotiations
- Federal Accounting Standards
- Federal Budget Process
- Introduction to Financial Management
- Performance Measurement & Budgeting
- Understanding Federal Financial Statements
- Federal Budgeting Process in DOE
- Budget Execution - Principles and Practice
- Budgeting and Accounting- Making the Connection
- Understanding & Responding to RFI's, RFQ's, and RFP's
- Defense Working Capital Funds - Financial Management
- Essential Statistics
- Management's Responsibility Under OMB A-123
- Preparing the Standard Form (SF) 133
- Principles of Federal Accounting
- Understanding the United States Standard General Ledger
- Basic Analytics Workshop
- Accounting Comes Alive
- Advanced Concepts in Financial Assistance
- Cost Principles of Fed Financial Assistance
- Elements of Finance for Senior Fed Officials
- Federal Financial Assistance Funds Management
- Fundamentals of Federal Financial Assistance
- Navigating Management Minefields in Federal Finance
- What Senior Employees Absolutely Must Know about Federal Finance
- Overview of DOE Financial Management
- Overview of Fed Accounting Principles
- Defense Planning, Programming, Budgeting and Execution
- Federal Budgeting for Non-Budgeting Personnel
- Introduction to Federal Budgeting Process
- Practical Budgeting for Professionals

- Planning and Budgeting for Major Capital Assets
- Understanding the Federal Budget Process
- Life Cycle Cost Estimating
- Successful Budget Justification and Presentation

Human Resources

- Alternative Dispute Resolution (ADR)
- Applying the 4 Kirkpatrick Levels of Evaluation to Measure/Enhance the Value of Training
- Basic & Advanced Position Classification
- Basic & Advanced Staffing
- Basic and Advanced Pay Setting
- Conducting Needs Assessments
- Hiring the Best
- HR as a Consultant
- HR Education & Training Management
- Strategic Recruitment
- Myers-Briggs Type Indicator (MBTI)
- Myers-Briggs/DISC/FIRO-B/Thomas-Kilmann/360° Feedback Assessments
- Everything DiSC Workplace® Training
- Everything DiSC Workplace® on Catalyst Training
- Everything DiSC Agile EQ® Training
- Everything DiSC Agile EQ® on Catalyst Training
- Everything DiSC Productive Conflict®
- Everything DiSC Work of Leaders® by Wiley
- Everything DiSC® Management Training
- Establishing Performance Standards
- The Five Behaviors Personal Development
- Intro to HR for Managers, Supervisors, and Team Leaders
- Labor Management Relation
- Navigating the Federal Hiring Process
- Performance Management Check-in for Senior Managers and Executives
- Performance Management for Supervisors
- Strategies and Tips for Recruiting Talent
- FLSA as Applied to the Federal Workforce

Leadership, Management & Supervision

- Aspiring Leaders
- A Guide to the Changing Workforce: Four Generations, One Workforce
- Coaching Skills for Managers

- Conducting Appraisal Meetings
- Core Leadership Skills
- Crucial Conversations/Crucial Confrontations!
- Developing & Implementing Performance Standard
- Documenting Performance
- From Super Worker to Supervisor
- Employee Engagement (Love 'Em or Lose 'Em)
- Generational Differences
- Giving and Receiving Feedback
- The Inclusive Leader
- Leaders as Mentor
- Leadership Excellence
- Leadership for Non-Supervisors
- Leadership Mastery
- Leadership Skills for the 21st Century
- Leadership From a Distance
- Leading Global and Virtual Teams
- Leading in Times of Change
- Management Skills for New Leaders
- Management Accountability and Internal Controls
- Manager as Mentor and Coach
- Mid-Level Manager Development
- Moving From Conflict to Collaboration
- Myers-Briggs/DISC/FIRO-B/Thomas-Kilmann/360° Feedback Assessments
- Preventing Workplace Bullying & Incivility
- Strategic Planning/Strategic Thinking
- The Successful Leader
- 40-Hour Supervision/40-Hour Leadership
- Strategic Planning & Management
- Intro to HR for Managers, Supervisors, and Team Leaders
- Critical Thinking Skills
- Crucial Conversations®
- Dealing with Difficult People
- Delegation: Developing Others through Shared Work
- Developing Strength-based Leadership
- Ethics and Decision Making
- Facilitating Groups
- Identifying and Closing Performance Gaps
- Is Supervision for You?
- Leadership through Effective Communication
- Leading Teams and Projects
- Making Meetings Work
- Making Meetings Work for Time Crunched Execs
- Servant Leadership
- Strategic Planning

- Strategic Thinking
- Supervisory Essentials
- Techniques for Managing
- Workforce Planning for Managers and Supervisors
- Writing Performance Objectives
- Creative Problem Solving
- Successful Decision Making
- Influencer® Training
- Leadership & Team Vitality
- Personify Leadership® Training
- What Motivates Me® Training
- Critical Thinking and Problem Solving
- Critical Thinking and Decision Making
- Creating Thinking, Problem Solving & Decision Making
- Trainer Development for Crucial Learning (formerly known as VitalSmarts) Training Programs
- Using Consultant Skills to Improve Individual and Org Performance

Managing Up

- Communicating with Senior Management
- Exercising Influence
- Leadership Skills for Non-Supervisors
- Managing Up, Down, and Across

Mentoring

- Mentoring For Success
- 6-month and 1-year Mentoring Programs
- Leading Without Authority
- Successful Mentoring Skills

Program Management & Auditing

- Basic Governmental Auditing
- Developing & Presenting Audit Findings
- The Fundamentals of Fraud
- Internal Audit - Principles and Practice
- Fraud in Federal Grants and Contracts: Detection, Identification and Prevention
- Fraud in Federal Grants and Contracts - Prevention and Detection
- Preventing and Detecting Fraud
- Auditing Fundamentals in the Federal Environment

Project Management

- Basic & Advanced Project Management
- Managing the Project's Budget

- Managing the Project's Contracts
- Managing the Project's Quality/Integration
- Managing the Project Risk
- Managing the Project's Scope
- Managing the Project's Time
- Monitoring and Controlling the Project
- Planning the Project
- Negotiation Skills for Project Managers
- Quality for Project Managers
- Project Leadership, Management, and Communications
- Project Cost Estimating
- Problem Solving and Analytical Thinking
- Time Management
- The Power of Habit® Training
- Advanced Concepts in Project Management
- Breaking the Code: Understanding Project Management
- Fundamentals of Program Management
- Planning and Managing Project Test and Eval
- Planning for Safety in Project Management
- Program Management and Portfolio Analysis
- Project Management Essentials
- Project Management Simulation Value Management
- Project Management Skills and Concepts
- Unlocking the Power of Earned Value Management
- Managing Projects and Priorities
- Project Risk Analysis and Management
- Project Planning Analysis and Control
- Scope Management Baseline Development
- Understanding Project Management PMP Exam Prep
- Getting Things Done® Training
- Building a High-Performance Project

Self-Management Skills

- Building Your Brand
- Creativity and Innovation
- Critical Thinking
- Managing Multiple Priorities
- Stress Management
- Stress Management for Effective Satisfied Employees
- Time Management
- Cool, Calm, Collected
- Emotional Intelligence
- Balance, Effectiveness and Professionalism
- Get Along with Anyone, Anytime, Anywhere

- Getting Along with Others

Teambuilding

- Building Effective Team Skills
- Building Relationships
- Communication Skills for Teams
- Escape the Jungle: Building Effective Teamwork
- Managing Teams in the Military / Contractor/ Civilians
- Teaming During Change
- Working Collaboratively
- Building High-Performance Teams
- Being an Effective Team Member
- Building and Working with High Functioning Virtual Teams
- Working Collaboratively to Build Strong Business Relationships
- Team Building
- The Five Behaviors of a Cohesive Team
- Building and Managing Effective Teams

Virtual Work

- How to Become an Expert Virtual Trainer
- Succeeding in a Hybrid Work Environment
- Managing Hybrid Teams
- Managing and Virtual Workforce
- Building and Working with High Functioning Virtual Teams

Writing & Managing Proposals

- How to Manage the Proposal Process: Planning, Writing, Preparation, Submission
- Understanding & Responding to RFI's, RFQ's, and RFP's