

Course and Coaching Catalogue



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Presented By :

Nick Jasprizza



Virtual Training and Coaching Offerings

- Consultative Relationship Development in the Virtual Environment
- Becoming a Trusted Advisor in a Dynamic Environment
 - Virtual Leadership Panel and Training
- Core Consulting Skills In the Virtual and Blended Environment
- Communicating with Presence in the Virtual Environment – Intermediate Virtual Presentation and Facilitation Skills
- Communicating with Presence in the Virtual Environment –Advanced Virtual Presentation and Facilitation Skills



- Developing a Culture of Coaching and Feedback in Virtual Teams
- Leading and Developing Virtual Teams – Advanced Virtual Course
- Webcast Presentation and Facilitation Skills – Advanced Virtual Training
- Communicating with Clarity – Advanced Virtual Training

Consultative Relationship Development in the Virtual Environment

Course Description

This advanced virtual course is designed to provide senior professionals with the knowledge and skills to develop and maintain client relationships in a blended client service environment. The course will discuss and address the challenges and the unique opportunities provided by working in this way with clients in both the virtual and face-to-face environments to develop a Trusted Advisor status.

As a result of this virtual training, participants will identify, use, and practice advanced behavioral techniques to develop trusted advisor status within their professional networks in a blended work environment.

Cohort Level

Manager to Senior Professional

Duration

8 hours split over 2 days

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

Understanding the challenges and opportunities dynamic business environments can present to us. The course examines how the client's mindset evolves along with the relationship to affect Trusted Advisor status.

Becoming a Trusted Advisor in a Dynamic Environment – Virtual Leadership Panel and Training

Course Description

The panel is designed to engage with thought leaders and subject matter professionals to discuss and analyze developing client relationships in a dynamic business environment. The panel will study the impact of experience, technical skill building, networking and relationship development approaches along with how we serve our clients and add value in challenging and dynamic business environments. The panel will explore the importance of technical consulting skills balanced with developing trust relationships in the current environment and ‘what’s in it for me’ as a consulting professional in blended and virtual client service settings.

Cohort Level

Director to Senior Professional

Duration

1 hour

Min to Max Cohort Size

Up to 40

CLIENT Co-Facilitation Option

Yes – with 3-4 leadership panelists and moderated by Nick Jasprizza. 3-4 senior panelists to discuss and provide specific insights and approaches.

Comments

Client relationship development in a dynamic environment. Understanding the challenges and opportunities of highly dynamic environments

- Vision of the future – What does a Trusted Advisor look like?
- Building Blocks – As a Trusted Advisor how did they get there?
- Networks – How to build professional networks particularly now and in the future?
- Skill sets – What are the important TECHNICAL skill sets we need to build? What is a consultative mindset and what does it look like in highly dynamic business environments?

Core Consulting Skills In the Virtual and Blended Environment

Course Description

This foundational virtual training combines a comprehensive and unique approach to the development of core consulting skills for professionals on transformational client engagements leveraging current state challenges and opportunities with blended virtual and face to face client service situations to develop a consultative mindset in their approach to client service and to effect Trusted Advisor status.

This interactive virtual training reviews the methodology and approaches for critical thinking and problem solving whilst reviewing a highly developed client case-study simulation that tracks the progress of an actual engagement.

Cohort Level

Snr. Associate to Director

Duration

8 Hours over 2 days

Min to Max Cohort Size

6 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

The virtual course takes participants through the 4 key steps of the consultative problem-solving process.

1. Define the Issue or Problem – developing theories or hypotheses
2. Gather Information – data gathering and challenging assumptions and validity of the information
3. Analyze the Information – Analyze surrounding issues and environments
4. Prepare and Communicate Outcomes – developing potential solutions and how to communicate to clients with influence and persuasion

Communicating with Presence in the Virtual Environment - Intermediate Presentation and Facilitation Skills

Course Description

The course is designed to provide a high impact virtual presentation and facilitations skills focused training for virtual teams. The course is designed to help develop professionals to improve presenting, speaking and facilitating on virtual platforms. This course will enable efficient planning and prep and leading practice approaches and techniques to lead and facilitate virtual meetings for internal teams and in client facing situations.

Cohort Level

Snr. Associate to Manager

Duration

2 Hours

Min to Max Cohort Size

3 to 20

CLIENT Co-Facilitation Option

Optional

Comments

Very successful virtual training to help professionals navigate presenting and speaking on virtual platforms like MS Teams and Zoom and how to conduct engaging and persuasive virtual meetings and presentations with executive presence.

Communicating with Presence in the Virtual Environment –Advanced Presentation and Facilitation Skills

Course Description

The course is designed to provide a high impact virtual presentation and facilitation skills focused training for virtual teams. The course includes practice, feedback and coaching during the virtual training for professionals who are already proficient in presenting, speaking and facilitating on virtual platforms and now want to take their skills to the next level. This course will enable efficient planning and prep and leading practice approaches and techniques to lead and facilitate virtual meetings for internal teams and in client facing situations.

Cohort Level

Manager to Senior Professional

Duration

4 Hours and can be split over 2 days

Min to Max Cohort Size

3 to 12

CLIENT Co-Facilitation Option

Optional

Comments

Very successful advanced virtual training to take professionals to the next level when presenting and speaking on virtual platforms like MS Teams and Zoom and how to conduct engaging and persuasive virtual meetings and presentations – course leverages extensive practice, recording feedback and coaching in the virtual environment with executive presence.

Developing a Culture of Coaching and Feedback in Virtual Teams

Course Description

This webinar is designed to support leaders and teams in developing a culture of coaching and feedback in the virtual environment. The ‘new normal’ has teams working remotely almost overnight and demands not so much a change in what we know but how we adapt to this new way of working and relating to each other. In other words, how we respond rather than how we react has become one of the most important leadership qualities to emerge. Resilience, empathy, vulnerability, Emotional Intelligence and a Growth Mindset have all begun to converge into a toolkit to enable organizations, leaders and teams alike to see the virtual team environment as an opportunity to create something new, something better than what has gone before.

Cohort Level

Manager to Senior Professional

Duration

1 Hour

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

A new type of collaborative leadership mindset sets the tone for developing a culture of coaching and feedback within our virtual teams and organizations. Rather than let the formal ‘above the line’ performance review conversations be the benchmark for how feedback is conducted, this new way of working affords us unique opportunities to engage with our teams with the more informal ‘below the line’ everyday coaching and feedback conversations. Leaders move beyond ‘performance reviews’ toward a collaborative leadership culture that serves the team and builds trust and rapport to ultimately develop a culture of Talent Development.

Leading and Developing Virtual Teams – Advanced Virtual Course

Course Description

This advanced virtual training is designed to support leaders and teams to develop practical approaches to effectively communicate and support each other in synchronous and asynchronous virtual team environments. These tools and approaches will help teams and leaders alike to overcome time zone considerations, technology, cultural differences and roles and responsibilities, reporting obstacles and to navigate the hierarchy of communication platforms and protocols.

Cohort Level

Manager to Senior Professional

Duration

4 Hours and can be split over 2 days

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

The ‘new normal’ has teams working remotely almost overnight and demands not so much a change in what we know but how we adapt to this new way of working and relating to each other. Cornerstone concepts are central to the course that includes Emotional Intelligence and a Growth Mindset to enable leaders and teams alike to improve virtual teaming.

Webcast Presentation and Facilitation

Skills – Advanced Virtual Training

Course Description

Webcast Presentation Skills course is designed to provide a high-impact virtual webcast presentation and facilitation skills-focused training for technical professionals designing and delivering technical webcasts to both internal teams and publicly to clients and potential clients. This course will enable efficient planning and prep and leading practice slide design with speaking and presentation techniques to lead engaging technical webcasts.

Cohort Level

Manager to Senior Professional

Duration

2 Hours

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

We have supported the transformation of our client's technical webcasts over the last 15 years. We coach many technical professionals who are presenting and speaking on their technical-based webcasts. The training and coaching support has transformed the design and delivery of these webcasts from dense technical slideshows to engaging panel and moderator-style forums with effective narratives to convey technical concepts within highly engaging formats that have elevated these webcasts to be considered industry leading.

Communicating with Clarity – Advanced

Virtual Training

Course Description

The Communicating with Clarity in the Virtual Environment course is designed to provide a high impact approach to understanding and creating effective and clear business writing skills.

Cohort Level

Snr. Associate to Snr. Manager

Duration

2 Hours

Min to Max Cohort Size

5 to 20

CLIENT Co-Facilitation Option

Optional

Comments

A new virtual course designed to improve both the communication and strategic clarity of email communications for technical professionals.



Virtual and/or Blended In-Person Executive Coaching

- Executive Coaching – tailored to individual needs

Executive Coaching – tailored to individual needs

Course Description

For the last 20 years, we have developed a robust coaching curriculum and methodology that helps our finance and accounting professionals succeed in their careers like nowhere else. From accent reduction, and communication skills to presentation skills and ‘train the trainer’ and facilitator support, to client relationship development and how to win new business, to winning fellowships at regulatory bodies, and through to becoming a Senior Professional. We have supported hundreds of coaching candidates to reach their full potential.

Cohort Level

Senior Associate to Senior Professional

Duration

Minimum half-day blocks in 2-hour intervals with the remaining time allocated to prep and post-coaching assignments

Comments

Typical areas where we provide executive coaching:

- Client Relationship Development and Trusted Advisor
- In-person Advanced Presentation and Facilitation skills
- Technical Facilitator Advanced Learning In -Classroom Skills
- Virtual Presentation Skills (Webcasts, Podcasts, and Micro-Learning)
- Regulatory Bodies: Fellowship applications
- Facilitation Skills and Train the Trainer
- Camera and Media Skills Coaching
- Effective Meeting Facilitation
- Virtual and Blended Team Building
- Career and performance review coaching
- Senior Professional and Managing Director promotion track coaching
- Accent Reduction & Cultural Awareness
- Leadership and Executive Presence
- Critical Thinking and Creative Problem Solving
- Leading and Managing Teams



In Classroom Offerings

- Becoming a Trusted Advisor:
Course #3 in the Relationship development Career Development Suite of Courses
- Managing Successful Client Relationships:
Course #2 in the Relationship development Career Development Suite of Courses
- Personal Branding and Networking:
Course #1 in the Relationship development Career Development Suite of Courses
- Core Consulting and Advanced Problem Solving Skills
- Leading through Coaching



- Communicating with Presence – Intermediate Presentation Skills
- Communicating with Presence – Advanced Presentation Skills
- Classroom Facilitation Skills

Becoming a Trusted Advisor: Course #3 in the Relationship Development Career Development Suite of Courses

Course Description

Relationship Development transforms the sales process to providing client-centric value and becoming a Trusted Advisor

Cohort Level

Sr. Manager to Director

Duration

2 days

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

Client relationship development is where the sale takes care of itself as the client's mindset evolves with the relationship. We have trained 1000's of professionals in various iterations of the course since 2007.

Managing Successful Client Relationships: Course #2 in the Relationship Development Career Development Suite of Courses

Course Description

Relationship Development and the tools and techniques to grow the process of developing and sustaining client relationships to effect a Trusted Advisor Status

Cohort Level

Sr. Associate to Manager

Duration

2 days

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

Practical tools and techniques to build client relationships and manage them successfully. We have trained 1000's of professionals in various iterations of the course since 2007.

Personal Branding and Networking: Course #1 in the Relationship Development Career Development Suite of Courses

Course Description

Understanding the organization and your position in it through the lens of personal branding and what networking really means as you begin your career

Cohort Level

Associate to Sr. Associate

Duration

1 day

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

Practical tools and techniques to understand and develop networking and personal branding. We have trained 1000's of professionals in various iterations of the course since 2007.

Core Consulting and Advanced Problem Solving Skills

Course Description

Developing a consultative mindset, innovative approaches, and creative problem-solving to add value to clients and become a Trusted Advisor. Developing a consistent consulting and problem-solving methodology for advanced professionals.

Cohort Level

Senior Associate to Managers and Directors

Duration

3 Days

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

This course has had a profound change in the professional's approach to developing client value and developing Trusted Advisor status.

Leading through Coaching

Course Description

Developing a culture of coaching and feedback for hybrid teams to address the need for supervision and talent development whilst delivering in synchronous and asynchronous environments.

Cohort Level

Managers and Directors/Senior Professionals

Duration

4 Hours

Min to Max Cohort Size

5 to 24

CLIENT Co-Facilitation Option

Yes – Recommended to provide specific insights and approaches

Comments

Developing practical approaches to the need for a culture of coaching and feedback on high-performing teams. For managers and directors and Senior Professionals to use and apply informal coaching and feedback conversations to grow talent and develop their teams.

Communicating with Presence – Intermediate Presentation Skills

Course Description

Presentation and Facilitation Skills for Technical Professionals presenting and speaking to influence and persuade with executive presence in client-facing situations.

Cohort Level

Managers to Senior Managers and Directors

Duration

1 Day

Min to Max Cohort Size

5 to 12

CLIENT Co-Facilitation Option

Usually delivered by 2 TJG facilitators and often with a client facilitator for business context

Comments

We have trained 1000's of professionals since 2008

Communicating with Presence – Advanced Presentation Skills

Course Description

Advanced Presentation and Facilitation Skills for Technical Professionals presenting and speaking to influence and persuade with executive presence in client-facing situations.

Cohort Level

Senior Managers to Senior Professionals

Duration

2 Day

Min to Max Cohort Size

5 to 12

CLIENT Co-Facilitation Option

Usually delivered by 2 TJG facilitators and often with a client facilitator for business context

Comments

This is the advanced course and takes influencing and persuasion in pitching to clients to the next level

Classroom Facilitation Skills

Course Description

An advanced ‘train the trainer’ course for technical professionals to develop their presentation and learning facilitation skills. To be able to take technical content and apply adult learning techniques to facilitate engaging learning internally for the organization.

Cohort Level

Managers to Directors

Duration

2 Day

Min to Max Cohort Size

5 to 15

CLIENT Co-Facilitation Option

Yes – Recommended to provide client specific insights and approaches

Comments

This course has had a profound change in the way technical professionals have developed their proficiency to transfer learning to the classroom. We have trained 1000s of technical professionals since 2006



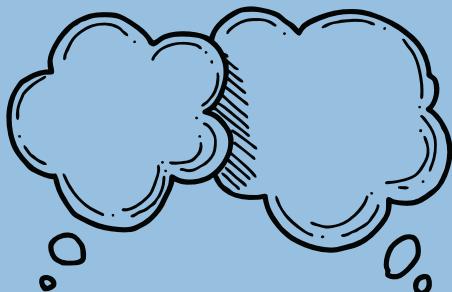
Your Strategic Facilitation Partner



About Us

Critical thinking and innovative ideas can easily stay just that – a good process with great ideas. However, consensus and execution are the keys to success. We have worked with business leaders across all areas of finance and accounting clients both in the US and globally to help the great minds of the firm come together to strategize, innovate, and develop actionable outcomes. These successful initiatives set our clients apart in the competitive landscape. Over the last 20 years, we have designed and delivered completely unique facilitated meetings and agendas to deliver on our promise – that when you get a group of intelligent and opinionated thinkers in the room it can be challenging to reach an agreed outcome – that is our job to engage our strategic thinkers and develop action plans that are implemented.

We have a long history of successful collaboration with the client teams to ‘create a culture of creative design with interactive facilitation techniques that ensures group buy-in, consistency in meeting session objectives with real traction on deliverables and outcomes’.



Some examples of strategic facilitation projects successfully designed and delivered for our current clients

- ·Global Advisory 'Are you all in?' Innovation Conference, San Francisco, CA – Leader Mark Goodburn, Global Head of Advisory
- ·Executive Forum on Africa – Industrial Manufacturing Strategic Conference on Africa in Johannesburg, SA – Leader Jeff Dobbs, Global Audit Head of Industrial Manufacturing
- ·Advisory Innovation Summit–Project Leader Colleen Drummond
- ·Regulatory Compliance Service Group Workshop–Project Leader Lisa Campbell
- ·IFRS Planning Workshop–Project Leader Karien Jansen
- ·Regulatory Services Strategy Planning Session–Project Leader Laura El-Wardany
- ·AD Strategy 'Toolkit of the Future'–Project Leader **Carin Abrahamsohn**
- ·Innovation Cycle Workshop–Project Leader Frank Wendt
- ·BPI Concept Meeting–Project Leader Andy Dunkinson
- ·GRC Meetings 1 and 2–Project Leader Evelien Zonneveld
- ·Advisory Development Team Bootcamp sessions from 2007 to present
- ·Advisory Development Team Summit–Project Leader Andy Dunkinson



**Please feel free
to contact us to
discuss further**

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