

## N&K 20% TRAINING CATALOG

The demands of today's work environment require skills and tools that enable organizations to meet the challenges of a marketplace that is at once global and local. N&K CPAs, Inc. provides organizations with those skills and tools.

## **The N&K Difference**

The N&K training difference is its integration of financial tools into its training. N&K uses its years of acquired business acumen intelligence to better define needs in order to ensure the training focuses on the most important issues.

## **Training at N&K**

For every good plan to succeed companies need the right people with the right skills to implement the plan. From sales and service training, to leadership development, process improvement and time management, the people at N&K help clients take actions to build a stronger staff and improve performance and profitability.

## **The N&K Training Team Leader**

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Dennis Higashiguchi is the Manager of Consulting Services for NBSÁ CPAs Inc. An accomplished trainer and facilitator, Dennis has extensive experience in most aspects of training, facilitation and planning. Dennis started at NBS CPAs, Inc. in February 2004. He specializes in Strategic and Business Planning, Sales Training and Team Building. Dennis has worked in the field of training and development since 1974. He is a member of the American Society for Training and Development; the American Society for Quality and for President of the Financial Education Association of Hawaii. He has worked with such clients as Oceanic Time Warner; American Savings Bank; First Insurance; Schuler Homes; Castle and Cooke Homes; the State of Hawaii Departments of Health, Education and Taxation; The State Office of the Auditor; Parker Ranch; Finance Enterprises; City Mill; Bank of Hawaii; City Bank; and numerous other organizations. Dennis was born and raised in Hawaii. He obtained a Bachelor's degree in Philosophy from St. Peter Chanel Seminary in San Rafael California and a degree in Theology from Marist College in New York.

## **N&K's Training Products & Services**













N&K uses a combination of approaches and lessons to achieve desired outcomes. It is the only training company in Hawaii to offer the Skills Centered Selling (SCS™) training program that trains staff in a proven sales process particularly appropriate for the service industry.

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# Winning Leadership!

## Overall Course Objectives

Becoming an effective leader does not just happen. It requires understanding the skills necessary to become a leader and acquiring those skills through continual learning and practice. The purpose of this course is to improve attendees' skills as leaders or potential leaders of people.

The specific objectives of the course are to:

- Increase understanding of the skills necessary to become an effective leader
- Practice use of those skills
- Develop "transfer to the job" action plans to reinforce class learning
- Practice a continuous improvement cycle (plan-do-study-act) to develop a life-long learning perspective
- Reinforce the practice of learning from each other through sharing ideas and experiences

## Assessment

Prior to the delivery of classroom training, we conduct an assessment of each attendee with his/her immediate supervisor. This assessment is designed to allow us to focus the training on the organization's specific needs and to begin a customized leadership development process for each attendee.

## Modules

The leadership modules are designed to be delivered together or as stand-alone courses. Each session is designed for a half-day of classroom work with a post-training assignment.

**Module  
1**

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## Leadership Defined

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### Objectives

- Define leadership and contrast it with “management”
- Discuss some of the characteristics of change and the impact it has on the responsibilities of leadership
- Introduce the concept of Situational Leadership
- Understand that success in personal development requires focus
- Identify individual leadership development focus and plans

### Curriculum

- Define Leadership
- Discovering the Future: The Business of Paradigms
- Change and the Leadership Impact
- Situational Leadership
- Your Leadership Development

**Module  
2**

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## Communication

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### Objectives

- Increase awareness of the importance of effective communication in the organization
- Identify barriers to the communication process
- Introduce one-way and two-way communication skills
- Practice communication skills
- Develop a transfer-to-the-job communication plan

### Curriculum

- Define communication
- Cost of ineffective communication
- Barriers to effective communication
- One-way communication
- Two-way communication

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## Understanding Others

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### Objectives

- Assess participant's patterns of human behavior
- Understand how our own pattern of human behavior affects:
  - What we value and are motivated by
  - Our perceptions of the workplace and those who work with us
  - Our expectations of others
  - Our "neutral" behavior in working/dealing with others
- Gain a better understanding of others based on four patterns of human behavior:
  - Improve our ability to work effectively with people who are different from us
  - Learn how to create conditions that encourage motivation
  - Understand why diversity is important to teamwork or success of a work unit
- Increase appreciation for human differences and diversity in people, including those people we label as "difficult to work with"
- Develop a transfer to the job plan which will improve your working relationships with someone you are having difficulty understanding

### Curriculum

- Understanding Others
- Understanding D-I-S-C
- Communicating with different types of people
- What do people need to be productive at work?
- Creating conditions for a motivated workforce
- Diversity is critical to successful work units

**Module  
4**

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## Conflict Resolution

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### Objectives

- Recognize conflict as a positive opportunity for growth
- Identify the continuum of types of conflict resolutions
- Increase awareness of our own style of conflict resolution
- Introduce and practice two conflict tools:
  - 3-step conflict resolution model
  - CALM DOWN

### Curriculum

- Attitudes about conflict resolution
- Continuum of conflict resolution
- A 3-step conflict resolution model
- Conflict behavior styles
- CALM DOWN
- Role plays

**Module  
5**

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## Problem Solving

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### Objectives

- Introduce and practice a 6-step problem solving model
- Learn and utilize helpful decision-making tools and techniques:
  - Structured brainstorming
  - Multi-voting
  - Criteria-based matrix
  - 5 why's

### Curriculum

- Problem solving through quality decision making
- A 6-step problem solving model
- Brainstorming and multi-voting
- Criteria-based matrix
- 5 why's

**Module  
6**

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## Time Management

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### Objectives

- Increase awareness of the importance of priority setting and time management skills for managers
- Gain insight into your life values and understand how they impact your priorities
- Learn and practice helpful time management tools and techniques to increase control over your time and life:
  - Covey's quadrant of activity classification
  - Goal and priority setting
  - Daily "To Do" lists
  - Handling paper only once
  - Swiss Cheese method
- Assess your time management behaviors

### Curriculum

- Time management and priority setting
- Using life values to set priorities
- Covey's Quadrants
- More time management techniques

**Module  
7**

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## Delegation

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### Objectives

- Define "delegation" and the importance of it as a leadership competency
- Discuss and practice delegation techniques, including:
  - Preparing to delegate
  - Selecting what to delegate
  - Deciding who to delegate
- Identify and develop strategies to overcome obstacles to delegation:
  - Assess your readiness to delegate
  - Assess the readiness level for specific task of the person you are delegating to

### Curriculum

- Delegation: A key to success
- Preparing to delegate
- What to delegate?
- Who to delegate to?
- Elements of effective delegation
- Stumbling blocks to effective delegation

**Module  
8**

## Coaching

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**Objectives**

- Discuss the objectives of coaching and the necessary elements for increased employee commitment
- Identify the two parts of the coaching process:
  - Pre-coaching analysis
  - Face-to-face discussion
- Learn and practice the 6-step process of face-to-face discussion

**Curriculum**

- What is coaching?
- The coaching process
- Role play

**Module  
9**

## Teamwork

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**Objectives**

- Increase the awareness of the importance and benefit of teamwork in the organization
- Identify the elements necessary for successful teams:
  - Schonk Model
  - Evolution of appreciation model
  - Team charters
- Review the natural stages of team formation and development
- Experience the dynamics of teamwork

**Curriculum**

- Teamwork: A strategy for improved performance
- Elements of teamwork
- Stages of group development

**Module  
10**

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## Customer Service

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### Objectives

- Expand our awareness of how “customers” are an integral part of our daily work
- Introduce and discuss the concept of “Moments of Truth”
- Explore our understanding of:
  - What we do
  - Who we serve (our customers)
  - Their expectations
- Improve our ability to effectively listen as a key tool in providing quality service

### Curriculum

- Values and criteria of a total quality management organization
- Defining common quality words
- Process mapping

**Module  
11**

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## Change Management

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### Objectives

- Identify and discuss current organizational paradigms
- Explore opportunities for positive change (paradigm shifts) in the organization
- Increase understanding of the dynamics of change by reviewing some change management models:
  - Change posture: victim or volunteer?
  - Morale cycle of change vs. business performance cycle
  - Change process
- Identify specific individual action plans for creating positive change

### Curriculum

- Opportunities for positive organizational change
- Change management models
- Change leadership skills assessment
- Action plan for creating positive change

<b>Module 12</b>
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## Leadership Practice

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**Objectives**

- Practice applying appropriate management tools and techniques to “real life” leadership situations
- Assess what you have learned about yourself as a leader
- Recognize and celebrate your development as a leader

**Curriculum**

1. Role Play: How would I address this issue?
2. Leadership assessment consolidation
3. Continuing my leadership development

**NOTE:** Module 12 is best applied when all eleven of the preceding modules have been used as part of a management development process.

# The \$ales Training Source

Employees gain a strong understanding of how to approach their customers, how to ask the right questions, how to identify problems and provide profitable solutions. The sales training courses offered by SMS Training provide a solid foundation for increasing the selling skill of employees.

Our sales programs are designed by SCS Skills Centered Selling. SCS is an international company with offices in New Zealand, Australia, the Philippines, England and Hawaii. Nishihama & Kishida CPA's, Inc. is licensed and holds the exclusive rights to customize and teach SCS programs in the State of Hawaii.

1

## **Customer Account Maintenance**

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This is a consulting activity that ensures that the necessary systems are in place to build relationships with existing key customers. Executive and senior management are coached in the skills necessary to facilitate a strategic planning meeting with customers. Face-to-Face Selling and Strategic Account Management programs should be completed prior to this course.

2

## **Customer Centered Selling**

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A program designed for those who have limited contact time with the customer in which to influence them. In this situation, the customer often has an idea of their needs (sometimes wrong), but has not worked out the value to them of a solution. The customer may approach the salesperson or the salesperson has only limited calling time with the customer. The salesperson is required to uncover and clarify the need, match the products or services they have to offer to the need, offer alternatives where the customer's perception of their need is wrong, or where there is greater value to the customer in accepting the alternative, qualify the customer if this is appropriate and then gain a commitment from the customer.

This program fits the competency profiles of those involved in platform banking, travel shop sales, big-ticket retail items, courier service sales and similar situations.

3

## **Face-to-Face Selling Skills**

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This is the core skills program that allows salespeople to: use effective behaviors in opening a call; uncover and develop a customer's perception of their problems and needs by asking specific types of questions; gaining commitment from a customer to achieve a development outcome and close a call. In addition, salespeople are taught to reduce the chances of objections and for those that might surface, handle them in such a way that the customer is satisfied with the response. Participants are able to identify resistance made by customers and to use effective verbal techniques.

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## **Managers' Field Coaching**

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This program teaches the managers of sales people trained in the core skills Face-to-Face Program, to use the skills effectively on-the-job. It allows the managers to analyze the specific behaviors used by the sales people and feedback their analysis finding in such a way, that the salesperson accepts the analysis and seeks further assistance when required. The Field Coaching Program provides a structured approach to determine the specific success model and behaviors appropriate for their selling situation.

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## **Sales Force Management**

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The program concentrates on the development of those unique technical skills associated with a sales manager's role. The skills enable participants to be able to: analyze the performance of their sales personnel and diagnose areas where changes need to be made to achieve either improvements in effectiveness or efficiency; set roles for both their sales people and themselves when they are conducting joint calls; analyze the sales behaviors of their personnel; coach their sales personnel using a 'curb-side' technique; coach sales personnel using strategy coaching; set sales plans and objectives; identify critical sales points in their sales environment and identify appropriate motivational strategies for their sales force.

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## **Strategic Account Management**

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A program for those involved at the upper end of the complex selling process who have to sell to multi-levels within an organization and in the first instance, discover the correct entry level.

The program concentrates on having the sales person understand the psychology of the customer in the buying process and adopting behaviors that match the customer's progress through the various psychological phases.

Sales people develop the skills needed to uncover a customer's decision criteria, match these to their own strengths and weaknesses, and then influence the decision criteria of the customer where a match doesn't occur. They are able to identify and help the customer resolve purchasing concerns. Sales people are trained to rehearse an internal seller where they are not able to get face-to-face with the decision-maker. Participants are introduced to the

# The Sales Training Source

## ***Strategic Account Management, continued***

account maintenance phase of the selling cycle and are required to identify implementation strategies relevant to their selling situation to ensure customer satisfaction.

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## **Telephone Selling Skills**

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The objective of this program is to produce sales people who are competent to use the telephone to prospect for clients, qualify prospects and achieve a development outcome appropriate for the organization's products or services. Participants go through a complete four-phase model of asking questions that are designed to surface customer problems and turn these problems into needs that can be satisfied with company products. A live calling session in which participants put their newly learned skills to the test can also be arranged.

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## **Training of Trainers**

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### **Training of Trainers Programs for Customer Centered Selling and Face-to-Face Selling**

These are programs for organizations that have the necessary internal expertise to have their own trainers deliver the two programs. The programs concentrate on ensuring that the internal trainers have superior behavior analysis skills, and are able to deliver the processes involved in the respective programs.

# Facilitation & Planning

# Facilitation & Planning Services

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## Facilitation of Your Next Meeting

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Today every organization faces tough issues which require meetings to develop direction, consensus, agreement or resolution. These issues can be divisive and controversial, require input from competing interests (internal or external), require problem solving not finger pointing, and need dialogue and communication for meaningful resolution. In other words, these meetings can be just plain painful and time consuming with the outcome frequently being unsatisfactory. Or, it might be that meetings are not as productive as desired. Whatever the case may be, our experienced facilitators can assist you so that meetings are productive and positive, and that outcomes are meaningful.

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## Process Improvement/Strategic Planning

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“Fail to plan and you plan to fail”. Strategic planning is the process of: 1) determining the organization’s purpose, its vision, 2) developing short and long-term goals as guideposts on the journey toward vision, and 3) creating and following action plans to facilitate the achievement of these goals. We offer your organization the opportunity to either learn and facilitate the strategic planning process yourselves or we will facilitate the planning process for you.

# Other Essentials

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### Artful Facilitation

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Facilitate: To make easier; assist. The objective of this course is to help individuals improve their skills in aiding group conversation and communication in the organization. Participants learn to better resolve conflicts, handle difficult people, encourage conversation, problem solve, and make decisions using prescribed methods.

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### Service Excellence

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Today's business environment requires employees to be responsive to customers and customer needs and expectations. Employees need a system to be able to quickly analyze and meet identified needs and expectations. Because customer needs and expectations are constantly changing - this challenges today's employees to adopt a continuously improving quality of service. Participants define and identify both their internal and external customers. They are provided with the means to assess customer expectations in five areas: physical factors, responsiveness, knowledge, dependability and empathy. They learn and apply a simple yet powerful problem solving process using listening, questioning, looking at alternatives and choosing solutions.

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### Telephone Dynamics

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Research shows that much of business today is transacted via the telephone. This includes selling, handling complaints, disseminating and seeking information, and numerous other customer service issues. The quality of the customer's telephone experience will go a long way towards strengthening the bond with the business. This program focuses on improving essential employee telephone skills, including: proper greetings, voice levels, intonation, speaking, speed, reflective listening skills, and questioning skills.

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### Train-the-Trainer

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We train trainers to deliver our training programs; however, we can also train owners and managers of small to medium size businesses to provide training for their employees. This is an innovative and cost-effective way to ensure that employees receive the benefit of valuable training in critical areas such as sales and customer service. This is the type of training that is too often lacking or missing for employees; however, the benefit isn't only for employees because owners and managers enhance their own skills and abilities by participating in the training. This is a practical approach to train employees in skills that can make the difference between success and failure.

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### Total Quality Management/Process Improvement

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Course objectives include:

- Reinforce the organization's commitment to provide quality service to its customers
- Better understand the dynamics of groups and enhance group facilitation skills
- Learn and practice a 7-step problem solving process which can guide teams through a quality management project.
- Practice using a story board for documenting and communicating team progress.
- Understand and practice utilizing various tools and techniques in a group environment

During this three-day program, attendees learn the basics of improving quality and process improvement through the following curriculum:

- A Total Quality Management Framework
- What is Data?
- Quality Indicators
- 7-Step Problem Solving/Improvement Process
  1. Identify the Improvement Opportunity
  2. Summarize the Current Situation
  3. Conduct Root Cause Analysis
  4. Create and Test Countermeasures
  5. Evaluate Results
  6. Standardize Improved Process
  7. What's Next?

The workshop is 60% role-play and case study.

# Notes

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