



Emile Woolf International

Training Professionals



6 Delta M

6 Delta M

Your business needs to develop its people – the 6 Delta M solution

Background

- Your leaders (at whatever level) need consistent non-technical skills so that they can both run their organisation, or teams, and undertake effective business development.
- We recommend an immediate programme of top quality, non-technical, Continuing Professional Development (CPD), supported by mentoring, to consistently develop your people, many of whom are already leaders or likely to be leaders in the future. Such a programme will also equip key staff with skills which will make any further study (such as an EMBA) more effective.

The '6 Delta M' programme

- We believe there is an urgent need to quickly equip key people in all businesses with the 6 key Development or 'Delta' skill which any professional business person must have; these are:
 - Leadership
 - Mentoring
 - Selling Skills
 - Presentation Skills
 - Negotiating
 - Strategy and Marketing
- Your 'key' people will also need professional mentoring (M) delivered by experienced business people.
- The 6 key Development or 'Delta' programmes plus the Mentoring results in our '6 Delta M' approach.
- We recommend that as many as possible of your people should attend the '6 Delta' development days of training and then, for your 'key employees,' there will be an additional commitment to attend on four days for mentoring sessions which will last for 2 hours for each of them.
- The mentoring will continue in Year 2 and there will also be two days of 6 Delta updates.
- EW's '6 Delta M' approach has been developed over 30 years of providing training to leading professionals. I set out below a typical two year course/mentoring programme and attach the detailed course outline in Appendix B.
- I have 'front-end loaded' the programme. If you wish to spread it more evenly over the initial two years due to budgetary or time constraints this is, of course, also possible.
- I set out below some background information about Emile Woolf and an outline of the programmes I recommend.
- I have included in Appendix C details of some of the other EWI trainers for future reference.
- The Mentoring is undertaken by experienced professionals who have (as a minimum) been CEOs in substantial businesses with a turnover in excess of \$250m. They have also been trained as mentors using programmes such as Meyler Campbell.

- The programme will be delivered in English but we can work in other languages if required.

| Course - the '6 Deltas' | Course length | Date | 2012 | 2013 |
|--|---|--------------|-------------|-------------|
| Leadership | 1 day | To be agreed | X | |
| Mentoring | 1 day | To be agreed | X | |
| Selling Skills | 1 day | To be agreed | X | |
| Presentation Skills | 1 day | To be agreed | X | |
| Negotiating | 1 day | To be agreed | X | |
| Strategy and Marketing | 1 day | To be agreed | X | |
| Update and revision | 2 days | To be agreed | | X |
| <i>The 'M'</i> Intensive Mentoring for up to ten people | *4 sessions per person each year. Each session will be two hours long. | To be agreed | X | X |

* There will be 8 days of mentoring each year. Each day will contain up to 5 two hour mentoring sessions.

Conclusion

- EWI and its team have more than 30 years experience of running successful and impactful training and consultancy worldwide.
- Our Mentoring is undertaken by experienced professionals who have (as a minimum) been CEOs in substantial businesses with a turnover in excess of \$250m. They have also been trained as mentors using programmes such as Meyler Campbell.
- We believe we are uniquely able to help you satisfy a core development need in 2012 (and beyond).

I look forward to hearing from you.

Yours sincerely,

Graham Durgan
 Chairman

Appendix A: EWI experience

- Emile Woolf was founded in 1976 to provide training for professionals and is now well known for offering high quality training internationally. Over 80% of our turnover comes from outside the UK.
- In recent years (from our bases in England, Russia, Pakistan and China) we have worked in a wide range of countries including:

| | | |
|-------------------|-----------|--------------|
| USA | Slovakia | Lebanon |
| China | Bulgaria | Bahrain |
| India | Hungary | Kuwait |
| Japan | Romania | Saudi Arabia |
| Azerbaijan | Albania | Jordan |
| Pakistan | Moldova | Malawi |
| Ukraine | Jamaica | Ghana |
| Poland | Dubai | Tanzania |
| Czech Republic | Qatar | Kenya |
| The Baltic states | Turkey | Egypt |
| Uzbekistan | Singapore | Russia |

- EWI is a provider of both technical and soft skills training to banks such as RBS, accounting networks (such as Ernst and Young, Moore Stephens, Praxity and UHY) and to corporate clients such as Hilton Hotels, BP and British Airways.



Appendix B: EWI Course Outline

| Course | Leadership |
|---------------------------|---|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>Leaders need to be developed and this course enables participants to understand what is required of them if they wish to take a leadership role. It also reminds them what is required to be an effective follower. By the end of the course participants will have a better understanding of:</p> <ul style="list-style-type: none"> • Client relationship management; • How to better network, communicate, negotiate, and sell • How to mentor staff and, as a result, how to obtain maximum productivity from them • What makes a great team work • How to both develop and achieve buy-in on strategy <p>This course is run using the 9 principles of leadership which focus on the need to:</p> <ul style="list-style-type: none"> • Have a clear vision • Be enthusiastic and Inspire • Be a good communicator • Set the pace and check for progress • Demand change and innovation • Have courage and integrity • Build alliances • Select and train good followers • Have fun |
| Who should attend? | <p>Individuals moving into any Leadership role.</p> <p>The sessions will be very interactive and will draw upon the experiences of all attendees.</p> <p>Case studies will also be used.</p> <p>Participants should expect to find this a challenging and stimulating programme.</p> |

| Course | Mentoring |
|---------------------------|--|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>You cannot be successful without a Mentor. Participants in this programme will learn what is required of them if they wish to mentor and also what is required as mentees. They will learn:</p> <ul style="list-style-type: none"> • How to mentor staff and as a result how to maximise productivity from them • How to be effectively mentored <p>The course covers:</p> <ul style="list-style-type: none"> • The value of mentoring • The role of a mentor • Key mentoring skills • An outline of the mentoring process • The value of psychometric testing • Two simple tests • How to listen, probe and inspire • How and what to record • Setting objectives/development plans • Reviewing performance • Issues in mentoring <p>One of the main outputs is a personal action plan. This programme is highly interactive; participants will be involved in practical mentoring sessions. It is a demanding but rewarding programme.</p> |
| Who should attend? | All 'key' individuals |

| Course | Selling Skills |
|---------------------------|--|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>The theory and discipline of selling is missing from the skills base of most professional services people. This course plugs that gap.</p> <p>By the end of the course, the participants will be able to:</p> <ul style="list-style-type: none"> • Deliver a successful sales presentation to clients • Formulate a sales strategy • Understand how to implement it • Appreciate how to 'close the sale' <p>The sales element of the programme covers both Tactical and Strategic selling and includes:</p> <ul style="list-style-type: none"> • Understanding of tactical selling • Win-Win • USPs • Benefits not features • Qualifying • Closing techniques • Understanding the 4 types of Buyer and their different needs and modes • Preparing a sales analysis • Using sales 'reminder cards'. <p>Attendees will prepare and deliver a sales presentation and undertake role plays.</p> |
| Who should attend? | <p>Selling skills should be as widely disseminated as possible so all 'key' individuals must be trained.</p> <p>(Many organisations are now training new joiners in Selling Skills.)</p> |

| Course | Presentation Skills (video based) |
|---------------------------|---|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>All professionals must have good presentation skills. By the end of the course the participants will be able to:</p> <ul style="list-style-type: none"> • Prepare effective presentations • Make good use of visual aids including PowerPoint • Deliver a successful presentation either to clients or internally <p>The course covers areas such as:</p> <ul style="list-style-type: none"> • The planning checklist • Audience analysis • Writing notes and handouts which work • Humour • Personal appearance <ul style="list-style-type: none"> - dress - hair - outline • Controlling the environment: <ul style="list-style-type: none"> - seating plans - room size - temperature • Use of voice <ul style="list-style-type: none"> - projection - modulation - phrasing - gaps • Use of Technology <ul style="list-style-type: none"> - when and how to use power-point - smart boards - computer projectors - overhead projectors - video conferencing - webinars • Seeking and handling questions and feedback • Body language • The differences between presentations and speeches <p>The course is intensively “hands-on” with the opportunity for attendees to prepare and deliver more than one presentation. Video recordings will be made and effective feedback provided.</p> |
| Who should attend? | <p>All leaders and managers and as many others as possible.</p> <p>Giving presentations is a crucial management and leadership skill.</p> |

| Course | Negotiating |
|---------------------------|--|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>A key part of being successful in business is being able to negotiate effectively.</p> <p>Participants will find this an illuminating and challenging programme and will leave well equipped to handle negotiations; whether selling and handling pricing issues or buying and wanting to retain good relationships with suppliers.</p> <p>The course covers:</p> <ul style="list-style-type: none"> • Negotiating styles <ul style="list-style-type: none"> - Analysing your own style • The principles of negotiation • BATNA • Characteristics of a successful negotiator • Preparing for a negotiation <ul style="list-style-type: none"> - Pre-negotiation research - Planning the negotiation strategy - Setting objectives - The key stages of a negotiation • Dealing with conflict in negotiation • The effect of giving a discount • Avoiding the common mistakes • Negotiating in competitive markets • Cultural differences around the world • Negotiating with skilled/awkward buyers • Confirmation and contracts • Practical exercises with individual feedback and review • Self development techniques for the future <p>The sessions will be very interactive and will draw upon the experiences of all attendees and the course leader.</p> <p>This is an inspiring course which can dramatically improve attendee's effectiveness to sell, buy and contract.</p> |
| Who should attend? | All leaders and managers and as many others as possible. |

| Course | Strategy and Marketing (The key MBA tools and how to apply them) |
|---------------------------|--|
| Date | 1 day - to be arranged |
| Location | To be arranged |
| Objective | <p>This is a highly intensive programme and will provide attendees with the knowledge of key strategic and marketing tools and how to use them in practice.</p> <p>Delegates will either revise their existing knowledge or learn the key techniques now taught in every business school.</p> <p>The strategic element will cover:</p> <ul style="list-style-type: none"> • ACI • PEST (EL) analysis • SWOT • Mission statements • The value/creation loop • Handy's five steps to effective change management • Deal and Kennedy's cultural analysis • Lewin's force analysis <p>The marketing element will cover:</p> <ul style="list-style-type: none"> • Brands • The difference between marketing and selling • Porter's five forces • BCG matrix • Product life cycle • Ansoff's analysis • Gap analysis • AIDA • 4 Ps • Pricing <p>The course leader who, having originally qualified as an accountant with PWC, has since been a CEO of a quoted plc and is today Chairman of several companies.</p> <p>The sessions will be very interactive and will draw upon the experiences of all attendees.</p> <p>Business school case studies will be used.</p> <p>Participants should expect to be excited and challenged by this programme.</p> |
| Who should attend? | All leaders and managers and as many others as possible. |

| Practical mentoring sessions | |
|------------------------------|--|
| Dates | 2 hours per person four times per annum – to be arranged |
| Location | To be arranged |
| Objective | <p>To help individuals improve their performance and achieve both personal and corporate objectives many of which they may have previously regarded as unattainable.</p> <p>Mentoring is undertaken by experienced professionals who have (as a minimum) been CEOs in substantial businesses with a turnover in excess of \$250m.</p> <p>An outline of the Mentoring Process:</p> <ul style="list-style-type: none"> • The process starts with an intensive fact-finding interview in the first session and at the end of this there is a discussion and the setting of initial objectives (where necessary). • At each subsequent session performance is reviewed and there is a discussion of any issues which may have emerged before objectives are re-set. • The IGROW approach and psychometric testing are used. • All mentees have access to their mentor at any time during the mentoring relationship either by phone or email; emergency sessions can be arranged if necessary. • Mentees benefit from the experience and objectivity of their mentor but also from access to the mentor’s extensive networks. |
| Who should attend? | <p>Attendees will find the mentoring process to be challenging.</p> <p>All ‘key’ employees, leaders and managers should undertake mentoring. This programme ensures that each participant achieves the maximum they are capable of.</p> |

Appendix C: EWI people

- Our management team is the most experienced in the market today. The team acquired Emile Woolf in 2002 and transformed it into the dynamic organisation it is today.
- Our tutors/trainers/mentors are unique because they are all:
 - professionally qualified e.g. ACA, FCA, ACCA, MBA
 - typically more mature and experienced than other tutors
 - experts in their chosen fields yet focused on what matters to accountants and their clients
 - excellent communicators

| Trainer | Experience | Qualifications | Expertise |
|---------------|--|----------------|--|
| Ian Charles | Qualified with PwC. 29 years training experience firstly within PwC and then at FTC and ATC. Director at ATC. Director at EWI. | BSc, FCA | Leading expert on IFRS, Auditing, Law, Financial Reporting, Train the Trainer/ Communication skills |
| Evie Bowyer | Qualified with Deloitte. 30 years training experience with FTC, BPP and ATC before working with EWI. Council member of the ICAEW | FCA | IFRS, Financial Accounting, Financial Reporting, Management Accounting, Train the Trainer |
| Robert Tully | Qualified with KPMG. 25 years experience of training firstly with FTC, then BPP and ATC. Director at FTC and ATC and now a director at EWI. | BSc, FCA | Leading IFRS authority, Financial Reporting, Financial Accounting, Taxation, Law, Financial Management |
| Ann Jenkins | Senior tutor with BPP, ATC and EWI. Qualified with Mazars and then worked at KPMG before becoming a senior tutor. | BA, ACA | IFRS, Financial Accounting, Auditing, Financial Reporting, Train the Trainer |
| Graham Durgan | Qualified with PwC. 30 years of training and publishing experience. FTC, Managing Director at BPP (Accountancy Courses), CEO and then Chairman at ATC, CEO at BNB (Resources) plc, Chairman at Foulks Lynch, Chairman at EWI, EWC and of several other companies. Member of Council of the ICAEW. Chairman Non-Executive Directors' Association Member WPO (World Presidents' Organisation). | BSc(Econ), FCA | Strategy, Corporate Governance, Mentoring, Leadership, Marketing, Pension Funds |

| Trainer | Experience | Qualifications | Expertise |
|----------------|---|-------------------------|---|
| Charles Tuffin | Qualified with KPMG. 20 years training experience firstly as MD with ATC and now as a senior tutor working with EWI. | BSc, MBA, ACA | IFRS, Financial Accounting, Auditing, Financial Reporting, Train the Trainer |
| Nick Blackwell | Qualified with PwC before joining Lehman Brothers as an analyst and Financial Controller. Moscow account director. Expert in Financial Services, accounting and auditing. | BSc, FCA | IFRS, Financial Accounting, Management Accounting, People in Business, Auditing |
| Miranda Yu | 20 years practical experience, Auditor in Chinese firm, FD in a China based international company, MD for a consulting company and partner in a Chinese local firm. Spent a year working in the UK with GT. Executive Director of Emile Woolf China, expert in accounting and auditing. | BSc, ACA, CICPA, | Economic Law Corporate Strategy & Risk Management Business Strategy Case Study Financial Accounting Auditing |
| Alan Zhao | Senior partner of a leading national accounting firm in China. 12 years experience in the auditing profession with a wide variety of sectors including many public companies and banks. Expert in Initial Public Offerings (IPO). Expert in international accounting. | ACA, CICPA, HKICPA, MBA | IFRS PRC Taxation Auditing PRC Accounting and FR |