

BOXERADVISORS
Translating Insights Into Action

2015 COURSE CATALOG

Boxer Advisors, LLC
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Corporate Information

- Small business with over 15 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-02F-0033T
OPM TMA Contract #OPM19-12-C-0046
SeaPort-e Contract #N00178-14-D-7218
NTIS (Joint Venture Partner through PTG)

POC

Kenneth M. Boxer, CEO
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A formal ROI survey found that as a result of the our work within one HHS office “75% of clients served said there were improvements in managers’ productivity, work group productivity, project completion team communications and service quality. Converting ONLY the tangible benefits to monetary value, results showed that the programs delivered a formal ROI of 70%, equaling approximately \$500,000 in dollars saved and/or productivity improvements after two years.”

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



WHAT WE OFFER

ABOUT BOXER ADVISORS

Boxer Advisors, LLC is a small business engaged in providing leadership development, organizational development and employee engagement consulting, coaching, and training services to Federal agencies and Fortune 1000 companies. 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 centuries of experience providing consulting, coaching and training services.

BOXER ADVISORS EXPERTISE

As a Strategic Human Capital Management Consulting Firm, Boxer Advisors offers a comprehensive **single source solution** for addressing clients’ needs. We are equipped to help organizations strengthen their capacities, develop their efficiencies, and energize their workplaces by teaching the skills that drive collaboration, strong execution and efficiency. Our team of highly specialized professionals bring strong, in-depth experience in 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
- 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

In offering these services, Boxer Advisors presents a disciplined, integrated professional services team that is immediately available to provide support to our clients.

BOXER ADVISORS PAST PERFORMANCE

Boxer Advisors is a Maryland based small business and premier provider of strategic human capital management solutions. The Boxer Advisors team 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:

- Centers for Medicare & Medicaid Services
- Department of Education
- Department of Health & Human Services
- Department of Labor
- Environmental Protection Agency
- 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

BOXER ADVISORS VALUE PROPOSITION

We partner with our clients to find the best solutions at competitive rates to address their most pressing people and organizational needs and help them achieve desired outcomes with measureable, lasting results.



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.
- **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** – Six week training program delivered using a blend of online and in-class resources providing cloud-computing training including: Virtualization, Cloud-Computing Technologies, Cloud Adoption Strategies, Cloud-Computing Governance, Software-as-a-Service, Platform-as-a-Service, and Infrastructure-as-a-Service.



OUR PARTNERS

The Boxer Advisor, LLC teaming partners are leaders in the field of OD, coaching, facilitation, and leadership development. As a team, we provide expert strategic human capital management consulting services in a variety of areas. Our teaming partners include:



Center for Organizational Excellence helps clients achieve meaningful and measurable outcomes through strategy, development, and implementation services in the areas of organizational effectiveness, human capital and technology solutions.



International Training Consortium, Inc. (ITC) offers a full range of training, consulting and coaching solutions to federal and commercial-sector clients throughout the United States. ITC combines the talents of over 400+ leading federal trainers, facilitators and coaches with the expertise and curricula to deliver comprehensive training tailored to client's needs and culture.



Modern Survey provides human capital measurements solutions and professional services to help make the correlation between employee performance and organizational success.



PPS, International (PPS) is a company of consulting professionals with offices in the United States and affiliates worldwide. PPS provides organizations with performance management expertise focused on improving the results through a systematic and thorough process that links HR systems such as interviewing and selection, training and development, and performance evaluation to organizational business drivers.



PTG International, Inc. works with federal agencies and commercial clients to create and implement protocols for evaluating the effectiveness of interventional training programs using a variety of data collection platforms.

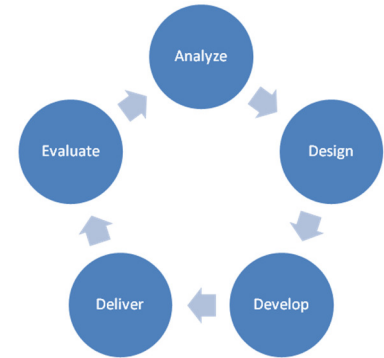
Our diverse team is well equipped to meet the full range of requirements for high-quality, creative, and deeply experienced leadership development training offerings, organizational development support and executive coaching resources to assist our clients achieve tangible results.



TRAINING CAPABILITIES

Our team offers a comprehensive **single source solution** for addressing CMS' training and development needs. We make it easy for CMS 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 insure the core training reflected in our materials is easy to understand and immediately applicable at CMS.

Our instructors are experts in adult learning methodologies and the key differences in learning styles, which may be generational, technical or behavioral. So 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 CMS-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 CMS and final approval of the material by the CMS 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 CMS-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, Michelle Mehler.

Contact Information

Michelle Mehler, Business Development Manager

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PROFESSIONAL/PERSONAL DEVELOPMENT & IT TRAINING OFFERINGS

Leadership, Management & Supervision

- Leading in Times of Change
- Leaders as Mentor
- How to Give Performance Feedback
- Leadership for Non-Supervisors
- Motivating Others
- Strategic Thinker: Leadership Practice for Innovative Organizations
- Self-Awareness and Leadership
- Coaching Skills for Everyone
- Coaching Skills for Managers
- Supervision & Group Performance
- High-Performance Development Model (Mastering 8 Management Competencies)
- Strategic Human Capital Management
- Introduction to Executive Leadership
- Foundations of Leadership
- Managing From The Middle: Leading Change
- Managing for Results
- Systems Thinking / Power Thinking
- Management Accountability and Control
- Developing & Implementing Performance Standard
- Leadership Skills for the 21st Century
- Positive *Inter-Action* Management
- Leadership & Communication Dynamics
- Introduction & Advanced Supervision
- Mid-Level Manager Development
- Senior Leader (SES) Development
- Leadership & Supervision Curriculums
- 6-month and 1-year Mentoring Programs
- Coaching For Performance
- Crucial Conversations/Crucial Confrontations!
- Moving From Conflict To Collaboration
- Counseling Problem Employees
- Coping with Organizational Change
- Managing Stress & Anxiety in the Workplace
- Enhancing Time Management
- Creating & Maintaining a Motivating Environment
- Project Management Skills & Techniques
- Leading With Emotional Intelligence
- Myers-Briggs/DISC/FIRO-B/Thomas-Kilmann/360° Feedback Assessments

- Enhancing Professionalism & Civility in the Workplace
- Preventing Workplace Bullying & Incivility
- Understanding the Cost of Workplace Bias & Bullying: Using Research Data to Craft Strategies
- Goal Setting for Improved Performance
- Delegation Skills: Proven Techniques for Efficiently Getting Work Done Through Others

Teambuilding

- Escape the Jungle: Building Effective Teamwork
- Teaming for Success: Win-Win Strategies
- Empowering Teams By Leveraging Cognitive Diversity & Personal Style Differences
- How to Build and Manage a Powerful Proposal Writing Team
- Valuing Diversity on Teams
- Leading With Emotional Intelligence
- Communication Skills for Teams
- Leading Mixed Generational Teams
- Building a Winning Team Environment
- Building a High-Performance Project Management Team
- Managing Teams in the Military / Contractor/ Civilians
- Managing a Remote Team
- Working Collaboratively

Negotiation & Mediation Series

- Alternative Dispute Resolution (ADR)
- Facilitator/Mediator Certification
- Interest-Based Bargaining (IBB)
- Basic Group Facilitation Skills
- Negotiation & Influence (“Getting to Yes”)
- Conflict Resolution
- Preventing Workplace Incivility and Bullying
- Preventing Workplace Violence
- Mediating Disputes
- Transformative Mediation
- Minimizing Bias in the Mediation & ADR Process

Self-Management Skills

- Emotional Intelligence
- Managing Your Emotions and Stress in the Workplace
- Work/Life Balance
- Self-Management: The Use of Time
- Time Management

Customer Service

- Quality Customer Service
- Customer-Focused Training
- Call Center Customer Service
- Managing Difficult Customers
- Telephone Customer Service

Communication Skills

- Exercising Influence: Building Relationships and Getting Results
- Exercising Influence
- Moving Beyond Bias
- Effective Communication Skills
- Communication Skills for Teams
- Effective Briefings
- Presentation Skills
- Facilitating Successful Meetings
- Constructive Negotiation
- Team Communication Skills
- Verbal and Non-Verbal Communication Skills
- Train-the-Trainer
- Business Correspondence
- Writing for Results
- Writing for Success
- Effective Writing and Proofreading
- Technical Writing for Professionals
- Conflict Resolution Strategies
- Managing Conflict in the Workplace
- High Impact Conversations: Handling Difficult Topics
- Editing Documents to Achieve Business Results
- Proofreading Skills to Achieve Flawless Documents & Emails: Ensuring Accuracy & Compliance

Communication Courses for Healthcare and Medical Professionals

- Essential Healthcare Writing Skills for Executives & Administrators
- Basic Healthcare Writing Skills

- How to Write Clinical Information in Plain Language
- Clear Medical Writing
- Effective Medical Editing (for Support Professionals)
- Effective Medical Proofreading for Flawless Documents (for Support Professionals)
- Legal Writing in a Healthcare Environment
- Clear Regulatory Writing in Plain English

Presentation Skills

- Instructor Training (all levels)
- Presenting Data Using Charts, Graphs, & Tables
- Presentation Skills
- Preparing and Delivering Executive Briefings
- Presentation Skills for Professionals
- Train-the-Trainer (Creative training designs and games for accelerated learning)
- Presentation Skills -- English as 2nd Language

Effective Email

- How to Write Clear, Concise, Actionable Emails
- How to Write Professional E-mail, Avoid Dangerous Pitfalls, and Save Time
- Are You Drowning in Email? How to Control Your In-box Instead of Being Controlled by it!
- Why Email? 25 Business scenarios where email may NOT be your best communication channel
- How to Use Email and Social Media Effectively in the Workplace and in Teams, Including Virtual Teams
- Email Etiquette – 25 Rules for Courtesy, Clarity, Coherence & Tact that Will Get Your Message Read & Acted On

Writing & Managing Proposals

- Managing & Meeting Proposal Deadlines without Compromising Quality
- Understanding & Responding to RFI's, RFQ's, and RFP's
- How to Build and Manage a Powerful Proposal Writing Team
- Success Strategies for Grant & Proposal Writing
- How to Manage the Proposal Process: Planning, Writing, Preparation, Submission
- Intensive Seminar on Writing a Research Plan, including: Hypothesis, Specific Aims, Background and Significance, Preliminary Studies, and Research Design & Methods

Scientific/Medical Writing and Publishing

- Turning Your Data into Scientific/Medical Journal Articles
- Using Journal Article Writing to Advance Your Career
- How to Manage the Scientific/Medical Paper Publishing Process
- How to Establish, Track, & Manage a Scientific/Medical Publications Pipeline
- Report Writing for Engineers & Scientists
- Clear Scientific Writing
- Effective Technical Editing
- Effective Technical Proofreading for Flawless Documents
- Establishing Editorial Standards for a Scientific/Medical Department or Work Unit
- Writing and Presentation Skills for Non-Native Speaking Professionals
- Basic English Skills (Grammar, Word Usage, Punctuation) for Non-Native Speaking Professionals: Critical Tools for Career Advancement
- Successful Writing for IT Professionals (specialized audience)

Change Management

- Successful Decision Making
- Intelligent Risk-Taking™: From Vision to Actions
- Mastery of Change: Thriving in Uncertain Times
- Managing Organizational Transition (MOT)
- Linkage: Change Leadership
- Change Management
- Organizational Change Training
- SkillTeach: Managing Change and Transition
- Individual Transition in Organizations (TO)

EEO Essentials, Diversity & Inclusion

- Diversity & Inclusion Best Practices
- Working With Mixed Generational Groups
- Cross-Cultural Communication & Awareness
- Enhancing Workforce Diversity
- Valuing Diversity on Teams
- Sexual Harassment Awareness & Prevention
- Moving Beyond Bias
- Workplace Incivility and Bullying
- EEO Essentials Workshop
- Workplace Inclusion Strategies

- Understanding Diversity: Differentiating Between Diversity, EEO & Affirmative Action
- EEO Counseling / EEO Counselor Certification
- EEO Investigation
- EEO Investigative Report Writing
- Advanced EEO Counseling
- Workforce Analysis & Planning Workshop
- Unconscious Bias Organizational Assessment
- Human Resources Professional Development
- Acquisition & COR Certification
- Strategic Planning/Strategic Thinking
- Succession Management
- Mentoring For Success
- Diversity re-President Obama's Exec Order
- Building High-Performance Teams
- 40-Hour Supervision/40-Hour Leadership
- Position Management: Techniques to Improve Organizational Efficiency
- Moving From Conflict To Collaboration

Human Resources

- Basic & Advanced Position Classification
- Basic & Advanced Staffing
- Basic and Advanced Pay Setting
- Processing Personnel Actions
- Qualifications Analysis
- KSAs & Job Analysis
- HR As A Consultant
- Position Management
- Category Rating
- HR Strategies & Flexibilities
- Strategic Recruitment
- Technical Writing For HR Professionals
- HR Education & Training Management
- Applying the 4 Kirkpatrick Levels of Evaluation to Measure/Enhance the Value of Training

Project Management & Quality

- Basic & Advanced Project Management
- Developing Work Breakdown Structures
- Strategic Planning & Management
- Project Cost Estimating
- Management of Project Risk
- Project Evaluation Planning
- Microsoft Project
- Project Measures Workshop
- Project Team Member Training
- Project Team Facilitation Workshop
- Project Measurement "Tools" Workshop
- Process Action Team (PAT) Training

- Planning, Reviews, & Inspection (PRI)
- Six Sigma / L6S
- PMP Exam Preparation Boot Camp
- Project Management Basics with MS Project
- Lean & Lean 6 Sigma
- Diversity 2020: Ten Diversity & Inclusion Trends Shaping the Rest of This Decade
- Unconscious Bias: Its Organizational Impact
- Leadership Strategies for Recognizing & Overcoming Unconscious Workplace Bias
- Empowering Teams By Leveraging Cognitive Diversity & Personal Style Differences
- Understanding the Cost of Workplace Bias & Bullying: Using Research Data to Craft Strategies
- Recognizing & Overcoming Gender Bias in the Workplace
- Overcoming Bias Against Women in Science to Empower Women in STEM

The Project Management Professional

- Project Management Overview
- Planning the Project
- Team Management for a Project
- Monitoring and Controlling the Project
- Project Closeout/Integration
- Managing the Project's Scope
- Managing the Project's Time
- Team Management for a Project
- Managing the Project Risk
- Managing the Project's Budget
- Managing the Project's Contracts
- Managing the Project's Quality/Integration
- Effective Writing for Project Managers and Team Leaders
- How to Write the 8 Most Crucial Project Management Documents (Project Charters, Project Results Summary, Lessons Learned, etc.)

Acquisition & Procurement

- CON 100, CON 170, CON 260, CON 270, CON 280, CON 290, CON 360 & other required DAU courses
- Basic Contract Administration
- Advanced Contract Administration
- Independent Government Cost Estimating
- COTR/COR Certification courses (5 days)
- COTR/COR BASICS Course (3 days)
- COTR/COR Refresher (1 day)

- Simplified Acquisition
- Government-wide Purchase Card
- Writing Effective Statements of Work
- Performance-Based Statements of Work
- Ethics in Procurement/Contracting
- Evaluating Technical Proposals
- Contract Law
- Contract law for Non-Lawyers
- Federal Appropriations Law (FAL)
- Grants Management

Financial Management

- Federal Budget Process
- Budget Analysis Workshop
- Budget Execution
- Budget Formulation
- Budget Justification & Presentation
- Federal Budget Process
- Federal Budgeting for Non-Budgeting Personnel
- Introduction to Federal Budgeting
- Planning, Programming, Budgeting & Execution Process
- Appropriations Law Seminar
- Introduction to Financial Management
- Management & Internal Control
- Performance Measurement & Budgeting
- Preparing for a Financial Statement Audit
- Understanding Federal Financial Statements
- Working Capital Funds
- Effective Contract Negotiations
- Cost Analysis
- Federal Accounting Standards

Program Management & Auditing

- Fraud Auditing
- Forensic Accounting
- Internal Audits / Grants Auditing
- Data Collection & Analysis
- Program Evaluation
- Basic Governmental Auditing
- Developing & Presenting Audit Findings
- Management Accountability & Control
- Understanding Financial Statements
- Forensic Accounting & Financial Investigations
- The Fundamentals of Fraud
- Managing E-Discovery in Financial Investigations
- Forensic Computer Investigations

Career & Pre-Retirement Planning

- Pre-Retirement Planning Seminar
- Mid-Career Retirement Planning Seminar
- Self-Directed Search
- Career Planning/Assessment
- Career Transition Workshop
- FERs Workshop
- CSRs Workshop

Accelerated Learning/Train-the-Trainer

- Using Games to Accelerate Learning
- Open Space Technology
- Enhancing Team Communication
- Interactive Team Learning
- Training Teams of Trainers: Proven Techniques for Cascading Content to Large Training Populations

Assessments

- Myers-Briggs Type Indicator (MBTI)
- Thomas-Kilmann Instrument (TKI)
- DISC
- FIRO-B
- Focus Groups & Surveys

Info Security & Programming

- Cyber Security
- Cloud Computing 101 & 201
- Managing Classified Information
- Computer & Network Security
- E-Mail Management
- Windows -- Security
- Java – Security
- Basic Internet & System Security
- Enterprise Security
- SharePoint
- Active Directory
- Exchange / Outlook
- Ajax, JavaScript
- C++ Basic Programming
- C++ Advanced Programming
- Visual C++ Programming
- Successful Writing for IT Professionals
- Writing About Technology for Non-Techies: 25 Proven Strategies & Techniques
- Improving Communication Between IT & Its Users/Customers
- Explaining Info Security in User Language

WEB

- Java & JavaScript Programming
- Dynamic HTML
- HTML Intro & Advanced
- XML Applications Development with Java
- Web Server Development & Management
- Writing Readable Website Copy