

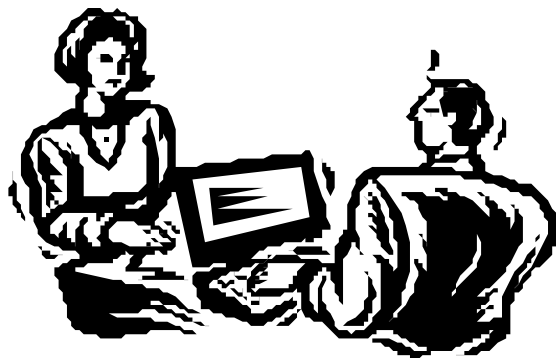
## **“Managing people is a pain!”**

You’ve heard this from your managers, supervisors and leads.

They are smart people. They just aren’t as smart as they could be about managing their people.

If they’re like most management, they aren’t nearly as proficient in their people skills as they are in their technical expertise. Imagine how much easier your life would be if they were better.

You know you need to develop your leaders, but you’re not sure exactly how to go about it. You weigh your choices:



**Morgan Seminar Group**

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

Your Need	Method	Benefits	Drawbacks
"Compliance" fix (one your boss/organization/HR/law requires)	1-hr. to 2-day mandatory training or e-learning.	<ul style="list-style-type: none"> <li>You get to status it as accomplished.</li> <li>Participants get at least some training.</li> </ul>	<ul style="list-style-type: none"> <li>Nothing changes.</li> <li>Waste of time and money.</li> <li>Participants feel they don't really need the training, so resist many of its key elements.</li> </ul>
"Miracle" fix	1-hr. to 2-day training, or e-learning, that you hope fixes the performance challenges of your team.	<ul style="list-style-type: none"> <li>It's short, so even if it doesn't work, your team hasn't wasted too much time.</li> <li>Participants get at least some training.</li> </ul>	<ul style="list-style-type: none"> <li>Nothing changes.</li> <li>Waste of time and money.</li> <li>Participants feel they don't really need the training, so resist many of its key elements.</li> </ul>
Long-term development solution	Customized, multi-session onsite training, specific to your people's needs, with follow up and coaching	<ul style="list-style-type: none"> <li>ROI is great, because the program includes issues germane to our environment, repeated skills practice, reinforcement and coaching between sessions, and management involvement, which ensure new skills are being applied.</li> <li>Helps retain key talent, as it is clear the organization has invested in their development.</li> <li>Short 2- to 3-hour sessions, mean fewer interruptions because their team can cope for a few hour</li> <li>Time to practice the skills in and between sessions to integrate them into their management style</li> </ul>	<ul style="list-style-type: none"> <li>Takes more time than a quick fix.</li> <li>Takes support from each participant's manager</li> <li>Can cost more than some 1- to 2-day trainings.</li> </ul>

## ***Recent project samples***

# **Enhance team cooperation in newly-restructured group**

## **Largest credit card company's international marketing department's quarterly team retreat**

### *Our level of responsibility*

I had total responsibility for the design and implementation of this process. I worked closely with the department manager and assistant manager.

### *Duration of the engagement*

1 month

### *The problem(s) presented to us*

The department recently downsized from 60 to 22. Some of the current team came from other departments. This would be the first real team process they would experience together. The manager wanted something that everyone would participate in, mixing up the regular work teams, and forcing them to cooperate within their group, as well as with other groups. The process was to be creative and focused on an issue they were going to be facing in the upcoming 12 months. This meeting would be the first time they will hear of their new charge.

### *Our steps in solving the problem*

- Clarify expectations and desired outcomes.
- Present several options that met client's criteria.
- Work with client to refine the chosen process.
- Gather the tools and materials needed.
- Facilitate the process.
- Debrief with the team.

### *Results achieved*

The manager and assistant manager reported the process created a connectedness with their team, which has enabled them to work more cooperatively. The exercise worked so well, they want us to continue our work together.

# Develop management and leadership skills in technical leads/supervisors

## World's third-largest software company

### *The problems presented to us*

The problem was developing management and leadership skills in technical leads/supervisors. Most of the participants had no human relations or management skills training, and little experience leading others. No training like this had ever been done at this level in this company.

### *Overview:*

We assessed the needs by holding two focus groups, one for supervisors/leads and one for their managers. Collaborating with the training manager, we designed 15 half-day sessions and one full-day session, delivered every other week. These covered interpersonal communication, delegation, defining your role, stress management, time management, conflict, change, cultural diversity, legal issues, and listening. We arranged for content-expert and internal guest speakers, as well as delivering the bulk of the program ourselves.

Our model is a university course, so there was pre-work and homework for each session. Since our in-session time was limited, the participants had pre-work reading to understand the concepts before each session, so we could focus on practice, discussion, and role plays in session. We used 14 Crisp Publications books and five Inscape Publishing Profiles, along with customized handouts.

### *Results achieved*

The managers reported that their participants displayed more confidence and willingly took on more responsibility as a result of this program. The participants initiated activities which relieved the managers of some of their tasks. The participants reported significantly better working relationships with their managers, team members, and contractors. The program was so successful, the company asked us to repeat it with two new groups. Within 12 months after completion, 90% of the graduating participants had been offered promotions.

Participants appreciated both the breadth of topics, and that the subject matter was focused on practical ideas they could use immediately in their work. They liked the cross-fertilization of ideas from other departments in the company. And they liked getting to know others with similar responsibilities.

### *Topics included:*

Understand yourself & others  
Understand your role  
Establishing yourself in the role  
Delegation  
Thinking on your feet  
Influencing in the Company  
Giving feedback

Listening effectively  
Time management and organization  
Stress management  
Confrontation  
Cultural issues  
Crisis/change management  
Legal aspects  
Graduation presentations

**Morgan Seminar Group**

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com



# Eliminate toxic relationships between key team members

## Biochemical research company

### *Our level of responsibility*

I had sole responsibility for the design and implementation of this program. I worked closely with the Manager of Knowledge and Learning, as well as the department manager.

### *Duration of the engagement*

One month

### *The problem(s) presented to us*

A senior scientist had developed a grudge against a team member, a junior scientist, and would not speak to or work with her. Counseling this employee had not created the results the manager wanted. The senior scientist had won awards for her research, so the manager didn't want to lose her, but her behavior was affecting the whole team negatively. The manager was considering transferring her to another group because her behavior had become so disruptive. The manager wanted a communication seminar to help her see the results of her behavior on the group.

### *Our steps in solving the problem*

I interviewed the department manager at length to understand the issues, what had been done to date, and the results on any previous intervention. I helped her clarify realistic expectations that this seminar would create.

### *Results achieved*

As a result of the discussion and information provided in the seminar, the senior scientist, who announced in the seminar she was about to quit because she was so frustrated with the junior scientist, decided, instead, to get her feelings out in the open. She spoke candidly, in front of the junior scientist, about her feelings. I facilitated a discussion between them, resulting in the senior scientist feeling heard by the junior scientist, but she made some requests that the junior scientist willingly agreed to. Amazingly, at the end they were hugging, talking and laughing in a way the others in the group were astounded by.

# Build ongoing customer service and team skills within key department

## One of Silicon Valley's prominent municipalities

### *Our level of responsibility*

I was responsible for the design and implementation of the 8-part series. I worked closely with the Director and Asst. Director on the design and customization of this program..

### *Duration of the engagement*

May 2001-August 2001

### *The problem(s) presented to us*

How to get the staff to increase their awareness and skills with serving repeat —and sometimes challenging—customers. The staff were mostly from blue-collar backgrounds, without a lot of education, but with plenty of “I don’t need this” attitude.

### *Our steps in solving the problem*

- Meet with managers to assess the current problems.
- Observe customer service processes.
- Interview frontline employees on their challenges.
- Create training flow and lesson plan.
- Design customized processes, and present seminars.
- Engage and brief guest speaker for one session.
- Attend post-series debrief with managers and discuss how they can reinforce key concepts.

### *Results achieved*

This program was implemented and the Director reports huge success. Employees are more sensitive to their reactions to customers, and show more patience. They are aware of modifying their behavior to better interact with those around them.

### *Topics covered*

Understanding Your Communication Style  
Using Communication Style Knowledge to Work with Challenging Repeat Customers  
**Calming Upset Customers**  
Managing Stress  
Listening for Increased Understanding  
Time Management in an Interrupt-Driven Environment  
Recap of all sessions

**Morgan Seminar Group**

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

# Turn parking cashiers into “Customer Service Ambassadors”

## Third largest municipality in California

### *Our level of responsibility*

I was responsible for the total design and implementation of this project, working with the city’s Parking Administrator.

### *Duration of the engagement*

1 year.

### *The problem(s) presented to us*

How to train cashiers in city-run parking lots to use customer-focused language and behaviors that will encourage visitors to return to the city for events and shopping.

### *Our steps in solving the problem*

- Held focus group with city and parking managers to understand their issues, and clarify their expectations.
- Held focus group with parking cashiers to understand their issues, and clarify their expectations.
- Interviewed additional cashiers to understand their challenges
- Visited all city’s parking garages to determine current level of service
- Read the city’s parking procedures and watched their current videos
- Interviewed content experts
- Determined training and design process for customized, self-study materials to fit the city’s customer communications needs.
- Wrote and designed self-study materials for the cashiers to understand customer service processes and concepts.
- Created “practicums” for the managers to test the cashiers ability to apply the concepts to real situations.
- Wrote leader’s guides for the managers/supervisors
- Created pre- and post-tests for the training
- Designed customer surveys; created incentives for customers to return surveys
- Wrote script and recorded the training material on audio tape so the cashiers could listen to the information again, after the trainings.
- Designed and delivered group training for managers/supervisors
- Designed and delivered group training for cashiers to explain program
- Created job aids.

### *Results achieved*

This training program was launched, with the group training of the cashiers. The supervisors, managers and cashiers were excited about the content and process of the learning. The managers, supervisors, and city officers report observing cashiers already using the skills from the program.



# Rekindle customer awareness with a custom-designed game show for all-company event

## International power research facility

### *Our level of responsibility*

I was responsible for the design and delivery of this game. I worked closely with the Training Manager and her staff to make sure the game format and questions were customized to the company.

### *Duration of the engagement*

1 month

### *The problem(s) presented to us*

How to create a fun, customer service focused, company-specific event that would energize all employees to look for the best solutions for customers. It needs to be easily manageable so that all 600 employees will feel part of the program.

### *Our steps in solving the problem*

- Discuss overall objectives of the all-company game
- Gather questions and answers for company-specific information.
- Design and add humor to the game questions.
- Do a run through with the HR staff to work out details
- Conduct a rehearsal with the 4 teams immediately before the event.
- Emcee one-hour "Customer Service Family Feud" game

### *Results achieved*

The client was very pleased with the level of involvement and increased customer awareness that this event initiated.



## Participants' Remarks

- “The most important outcome of this course was the clarification of the Team Lead role for my manager. Had I uncritically behaved according to the definitions of other Team Leads I’d met, I would not have met expectations. The simple exercise of setting specific guidelines gave me the confidence to make decisions on many occasions.

I appreciate the warmth, wisdom and good humor that Rebecca brought, session after session. She molded an agenda and atmosphere that stimulated, challenged and educated me. I appreciate that.”  
—Dennis Kauffman

- “The one thing I am most proud to say about how I’ve grown since the beginning of this course, is that I have gained confidence. I believe in myself and my abilities. I know I can do a great job. And I know that this company will help me along and stand behind me.” —Steve Brunetto
- “I think the training program is beneficial to not just leads, but managers also. I have been aware of some of the leadership skills and theories through experience and previous interpersonal communication training, but this training strengthens my knowledge and also adds to it. I highly recommend this program to other colleagues.” —Lisa Choy
- “The past 8 months have been very exciting. We have covered so many topics and I have learned so much about myself—how to be a good lead, how to handle difficult employees, delegation, change at work—all of which I can apply to my job right away.

“I’ve learned a lot and would recommend managers take the program so they know as much as we do! A special thanks to Rebecca who makes learning fun and challenging. It’s been a pleasure to be in her program.” —Chi-Jen Fang

- “Overall, this was a fantastic experience for me and has given me some great leadership tools, as well as allowed me to work in teams with members of other divisions in the company, whom I otherwise wouldn’t have met. It was a terrific opportunity! —Megan Buck
- “I thought the course on a whole was extremely worth while taking. There were some very important pieces of information that I use and refer to daily. What I feel was most important was we learned about ourselves—how we think, feel and react. This is so important in leading others. If we know ourselves, we can see and understand others.” —Karen Winguth
- “I am very grateful to have had the opportunity to take this course. I hope my company continues to make this excellent course available to leads. The cost of the course is microscopic compared to the benefits!” —Liz McQuarrie
- “Out of the lead training program, I got a better understanding of my role, have total confidence in all my tasks, and deal with my team members with a much more effective approach. This program was very valuable to me and I truly believe my leadership skills have improved significantly.” —Anthony Lam

(Copies of the full text from which the above is excerpted is available upon request.)

**Morgan Seminar Group**

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

# Morgan Seminar Group—The Right Choice

## Partnering for Your Success

---

Morgan Seminar Group is a nationally-recognized training and development firm, based in San José, CA. Founded by Rebecca L. Morgan in 1980, Morgan Seminar Group partners with clients to create innovative, long-lasting training and development solutions. Our focus is working with you to increase people-productivity and profitability by providing the right skills for the right people in the right way.

We focus on long-lasting results, not flash-in-the pan fluff. We deliver solutions that meet your objectives—on time and on target.

Since 1980, Morgan Seminar Group has served hundreds of clients, including Amgen, Community Hospital of Santa Cruz, Cutter Biological, Dominican Hospital, Hawaii Nurses Association, Richard Carr Physical Therapy, Stanford University Hospital, Sunnyvale Medical Clinic, United Blood Services

## Creating Innovative Solutions For Your Challenges

---

Having created alliances with some of the country's best content experts, Morgan Seminar Group engages these colleagues for appropriate projects. We have a cadre of the highest calibre professionals available to work with us to create solutions for your challenges.

Our learning solution designs often include:

- Focus groups and/or e-mail survey with the target group(s) and their manager(s)
- Interviews with key individuals
- Sampling the target group's work
- Customer surveys

Solutions can include:

- Pre-tests
- Post-tests
- Executive overviews
- Individual coaching
- Individual study
- Pre-work
- Assessments
- Individual self-study
- Group training sessions
- Custom audio-learning
- Customized manuals/learning guides
- Homework
- Job aides
- Follow up with individuals, teams and/or their managers
- CD-ROM, audio, video, computer-based, or Web-based self-study

**Morgan Seminar Group**

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

---

## Easy to Work With

---

Clients comment repeatedly that Morgan Seminar Group is easy to work with. Over 80 percent of our clients are repeat and from referrals. Our orientation is to partner with you to make your job easy. Clients describe Morgan Seminar Group as professional, highly-competent, innovative, and a joy to work with.

We develop an implementation plan based upon your company's specific needs. We discover these needs by conducting a thorough needs assessment to make sure we create the best plan for your situation. We then design innovative solutions to address the target group's challenges and areas for development.

---

## Rebecca L. Morgan, Founder and Principal

---

Morgan Seminar Group founder and principal, Rebecca Morgan, is one of America's most respected and sought-after people-productivity experts, human development solutions designers, authors and speakers. Her media appearances include 60 Minutes, The Oprah Winfrey Show, National Public Radio's Market Place, *USA Today*, *Home Office Computing*, *CRM Magazine*, *San José Mercury News*, and the *San Francisco Chronicle*.



Rebecca's books, tapes, videos, and learning tools exemplify the excellence she creates in all of her work. She's authored four popular books—two have been translated into French, German, Italian, Korean, Danish, Russian, Chinese and Spanish. Additionally, she's co-authored three others; one is a fund-raiser for the US Olympic team. Her books include: *Calming Upset Customers*, *TurboTime: Maximizing Your Results Through Technology*, *Professional Selling: Practical Secrets for Successful Sales*, *Life's Lessons: Insights and Information for a Richer Life*.

---

## One of an elite few professionals

---

Rebecca is committed to continuous learning and growing, especially since that is what she imparts to others. She has demonstrated this striving by receiving the Certified Speaking Professional (CSP) designation conferred by the National Speakers Association (NSA). At the time, the ten-year-old designation had been earned by only 215 people in the world—less than seven percent of the 3700 members of NSA.

The CSP is a designation of achievement earned through proven speaking experience. It is awarded to individuals who have completed a comprehensive application process and met NSA's stringent criteria.

She has also earned the professional designation Certified Management Consultant (CMC) from the Institute of Management Consultants (IMC). She is the fifteenth professional in the world to earn both the CSP and the CMC designations.

Morgan Seminar Group

1440 Newport Ave. ▲ San José, CA 95125-3329 ▲ 408/998-7977 ▲ Fax: 408/998-1742  
Rebecca@RebeccaMorgan.com ▲ www.RebeccaMorgan.com

# Clients

## Associations

- ★ American Society for Training & Development
- ★ American Telemarketing Association
- ★ Association of Executive Saleswomen
- ★ California Apartment Association
- ★ California Club Managers Association
- ★ California Credit Managers Association
- ★ California CPA Foundation
- ★ California Farm Bureau
- ★ California Rental Association
- ★ Commonwealth Club of San Francisco
- ★ Electronic Representatives Assn.
- ★ Fire Suppression Systems Assn.
- ★ Meeting Professionals International
- ★ Monterey Chamber of Commerce
- ★ National Association of Plumbing, Heating, Cooling Contractors
- ★ National Management Association
- ★ National Society of Performance & Instruction
- ★ National Speakers Association
- ★ Sacramento Society of Association Executives
- ★ Sales and Marketing Executives
- ★ San Francisco Chamber of Commerce
- ★ Society of California Accountants
- ★ Society of Human Resource Managers
- ★ Western Conference of Association Executives

## Education

- ★ American River College
- ★ Los Rios Management Association
- ★ Newport/Mesa Unified School District
- ★ Saint Mary's College
- ★ Stanford Alumni Association
- ★ University of California
- ★ University of Hawaii
- ★ University of Wisc., Madison, Management Institute

## Financial

- ★ AFSA Data Corporation
- ★ American Institute of Banking
- ★ Bank of America
- ★ Bank of the West
- ★ California Credit Union League
- ★ Citicorp Savings
- ★ Comerica Bank

- ★ EurekaBank
- ★ Guaranty Bank
- ★ Irwin Mortgage
- ★ Pacific IBM Credit Union
- ★ Unified Mortgage Company
- ★ Visa International
- ★ Wells Fargo Bank
- ★ World Savings and Loan

## High Tech

- ★ Adobe Systems
- ★ Altera
- ★ Amdahl
- ★ Apple Computer
- ★ Applied Materials
- ★ Applied Opal
- ★ Auspex Systems
- ★ Cadence Design Systems/Valid Logic
- ★ Coherent
- ★ Compression Labs

- ★ Proteus Industries
- ★ Quantum
- ★ Seagate Technology
- ★ Sony
- ★ SanDisk
- ★ Stanford Linear Accelerator Center
- ★ Sun Microsystems
- ★ Tandem
- ★ Telogy
- ★ Ultratech Stepper
- ★ Varian
- ★ Watkins Johnson Company

## Hospitality

- ★ Best Western Inns
- ★ Colony Surf Hotel/Michele's Restaurant
- ★ Desert Community Hotel/Motel Association
- ★ Grand Hyatt, San Francisco
- ★ Holiday Inn of Santa Cruz
- ★ Hotel Sales and Marketing Association
  - ★ Hyatt Regency Monterey & SF Airport
  - ★ Meeting Professionals International
  - ★ Meetings West
  - ★ Meeting World National Assn. of Catering Executives (San Francisco)
  - ★ Network Meeting Center
- ★ Outrigger Hotels
- ★ Red Lion Inns

### ★ = Repeat Business

*These organizations have profited by more than one of Rebecca's presentations and/or have referred her to an affiliated organization/division.*

- ★ Computer Associates
- ★ Dataquest
- ★ Digital Equipment Corp.
- ★ ESL/TRW
- ★ Expandale Software
- ★ Gupta
- ★ Hewlett-Packard
- ★ Honeywell Measurix
- ★ IBM
- ★ Implant Center
- ★ Komag
- ★ LifeScan
- ★ Lockheed Martin
- ★ LSI Logic
- ★ MPSI
- ★ NCR
- ★ Novell

## Insurance

- ★ Allstate
- ★ Amica Insurance
- ★ Business Insurance Group
- ★ California State Automobile Association
- ★ Dallas Life Underwriters
- ★ Farmers Insurance
- ★ Independent Insurance Agents of America
- ★ Independent Insurance Agents of AK
- ★ Independent Insurance Agents & Brokers of CA
- ★ Independent Insurance Agents of CO
- ★ Independent Insurance Agents of HI

## Morgan Seminar Group

- ★ Independent Insurance Agents of ME
- ★ Independent Insurance Agents of MI
- Independent Insurance Agents of MN
- ★ Society for Insurance Trainers & Educators
- Sullivan Payne
- Tennessee Farmers Insurance
- Travelers/EBS
- ★ Vancouver Life Underwriters
- ★ West Bend Mutual Insurance

### Manufacturing

- ★ ARAMCO Oil Company
- ★ Chevron
- Fetzer Winery
- General Foods
- Granite Rock Co.
- Levi-Strauss
- Shure Brothers
- ★ WaterFurnace International

### Medical

- Amgen
- Community Hospital of Santa Cruz
- Cutter Biological
- ★ Dominican Hospital
- ★ Hawaii Nurses Association
- Richard Carr Physical Therapy
- ★ Stanford University Hospital
- ★ Sunnyvale Medical Clinic
- United Blood Services

### Real Estate

- Contempo Realty
- Electronic Realty Association
- Grubb & Ellis
- J.R. Parrish
- ★ Old Republic Title
- Sacramento Valley Apartment Association
- San José Board of Realtors
- ★ Santa Clara County Escrow Association
- Santa Clara Land Title
- ★ San Mateo Board of Realtors
- ★ Santa Cruz Board of Realtors

### Retail

- ★ Any Mountain Ski Shops
- ★ Computer Literacy Bookshops and Online
- Hi-School Pharmacy
- Macys
- ★ McWhorter's Stationers
- Nsational Advisory Group of Convenience Store Owners
- National Glass
- ★ Santa Cruz Beach Boardwalk
- Vallco Fashion Park

### Service

- ★ Fastrac
- ★ Genigraphics
- ★ Hello Direct
- ★ Infonetics Research
- ★ Institutional Financial Services
- Jostens
- Magazine Publishers Conference
- ★ Regis McKenna Inc.
- ★ San José Athletic Club
- San José Sharks
- ★ Skyway Freight Systems
- Ware Fletcher Law Firm
- Weight Watchers

### Transportation

- Bekins Moving & Storage
- ★ California Moving & Storage Association
- ★ Golden State Moving
- ★ National Moving & Storage Association
- ★ Northwest Moving & Storage Association
- ★ Southwest Warehouse & Transfer Association
- Toyota Motor Credit Corporation

### Utilities

- East Kentucky Power
- GTE of California
- ★ Hawaiian Electric
- Northern States Power
- Ohio Edison
- Pacific Gas & Electric