

Courses for The Violand Executive Summit are divided into four categories. To graduate with a Certificate in Small Business Management from Violand Management Associates in partnership with Kent State University, you must complete one course from each of the categories, along with four additional courses from any combination of categories.

- **Finance**
- **Sales and Marketing**
- **Leadership** (*growing yourself, understanding relationships, high-level courses, change*)
- **Human Resources** (*organizational development, team building, creating culture, hiring/developing*)

To help you select your courses, we have assigned relevant experience levels to each:

- **Cornerstone** – Courses for those who are new to the Summit or to that category
- **Advanced** – Elevated courses for those with some experience in the subject
- **Elite** – Highest-level instruction for those with advanced knowledge or experience

### **COURSES FOR THE 2023 SUMMIT** – Choose one course each day

#### **Wednesday**

- AccountMap Account Strategy Workshop
- From Managing to Coaching
- Identifying, Communicating With, and Influencing Project Stakeholders
- Ineffective Managers Focus on Nothing but Mistakes
- More than Numbers...
- Rethinking the Organization: Appreciative Inquiry

#### **Thursday**

- Communicating Effectively
- Driving a High-Performance Sales Team
- Finance for Small Businesses
- “Me, Inc.”: Your Personal Brand is Your True Competitive Edge
- Passing the Baton – Winning the Succession Race
- ROI of Happiness

Course descriptions are listed on the following pages.

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### 2023 COURSE DESCRIPTIONS – Wednesday

#### **AccountMap™ Account Strategy Workshop**, Jim Ryerson *Everything You Need to Know Before You Step Foot in a Customer's Door*

Category: Sales and Marketing  
Level: Cornerstone

Why do some restoration and cleaning sales professionals seem to open new accounts at will while others get blocked every time? It's simple: effective strategy. While there are many factors involved in converting a competitively-held account and developing larger contracts with existing customers, there are several common themes. The AccountMap™ program addresses those common themes and customizes them to the industry. Sales professionals who successfully incorporate the themes into their account strategies improve their ability to win! The AccountMap™ is both the process to develop the strategy and the visual evolution of that strategy. This workshop shows you how to gain a new and profitable business in restoration and cleaning through effective strategy.

The AccountMap™ workshop addresses common themes, such as:

- Formal (organization chart) and informal (power relationship) structures of customers/prospects
- Solid, written steps to move the sale forward
- Specific, written deliverables and accountabilities for each step
- A clearly defined sales goal and timeframe
- Your competition's situation and their strengths and weaknesses

#### **From Managing to Coaching**, Mike Testa *Building Capacity in Your Organization*

Category: Human Resources  
Level: Elite

Leaders too often carry the immense burden of thinking they have to motivate people, be inspirational enough, model the right work ethic, etc. It's a ton of work, and mostly ineffective. In reality, true motivation wells up from within a person. It's not "installed" from the outside. People are at their most motivated when they do what matters most to them – giving them a sense of purpose, expertise, contribution. The leader who coaches has a significant role in this process. The leader who coaches well creates the conditions that encourage others to discover their deepest motivations. The leader who coaches creates the space for others to tap into their own sources of courage and creativity. The leader who coaches creates the support and encouragement for others to increase engagement and take on more responsibility. The leader who coaches creates capacity in the organization.

- What coaching IS; What coaching DOES; What coaching HAS
- Differentiating coaching from managing
- Defining a coaching process that can be used in all coaching conversations
- Learning and practicing the key coaching skills

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### **Identifying, Communicating With, and Influencing Project Stakeholders**, Bob Jewell, PMP *Become The Conduit for Successful Connections*

Category: Human Resources

Level: Cornerstone

One of the major reasons for project failure is having poor relationships with stakeholders during the project. Stakeholders are defined as those who will be involved in, have a vested interest in, or will exert influence on the project. To ensure the success of a project, project managers and team members must seek to develop strong relationships with important stakeholders. These relationships will be an ongoing process throughout the life of the project.

This course focuses on the skills and tools necessary to effectively identify, communicate with, and influence the stakeholders of a project.

- Identify the project's stakeholders
- Perform stakeholder analysis
- Clarify roles and responsibilities
- Communicate with stakeholders
- Create strategies that effectively influence stakeholders

### **Ineffective Managers Focus on Nothing but Mistakes**, Scott Tackett *Proper Performance Management Achieves Greater Results*

Category: Human Resources

Level: Advanced

Performance management is the process of continuous assessment, communication, and feedback between a manager and employee toward the achievement of organizational objectives. When applied consistently, performance management is a powerful tool, but managers must be willing to actually use it if they want to effectively coach their employees. Using time-tested strategies, this interactive course will walk participants through how to implement the concepts behind performance management. By doing so, relationships will be built, buy-in will be improved, and better results will be generated.

Become a more-effective manager, build trust in your organization, and take your employees to the next level.

- Learn the hallmarks of an accountable manager
- Use performance management to overcome excuses and improve customer service
- Set standards and communicate expectations
- Overcome the 7 barriers to accountability
- Ensure Standard Operating Procedures are being followed

### **More than Numbers...**, Josh Bachman

*Move Beyond the Numbers on the Page, Put Your Data to Use, and Make Informed Decisions*

Category: Finance

Level: Advanced

As a small business leader, you have numbers flying at you fast and furious every day – from income statements and balance sheets to job management dashboards with margins and timeframes. How do you sift through it all and pay attention to what’s most relevant and will ultimately influence good decision making? In this course, we will dive into real-time data and learn how to set up reporting that we can use to properly manage the business. From watching only the most pertinent metrics, and then learning what to do with those metrics once you have them, you can have the numbers start working for you, instead of you being driven by them.

- Develop meaningful measures in alignment with your business objectives
- Enable timely decisions based on scalable and repeatable methodology
- Learn how to interpret the space between the numbers to take appropriate action
- Determine the difference between the truly important numbers and the “nice to have”
- Organize data by building intuitive and dynamic dashboards

### **Rethinking the Organization: Appreciative Inquiry**, Dr. K. Kay Potetz

*Advocating the Best of What is to Create the Best There Can Be*

Category: Leadership

Level: Advanced

Transformational change in an organization happens when all members of the team are motivated to identify, celebrate, and engage in the most advantageous components of your culture and business. Generate new ideas and initiatives that focus on your strengths and untapped potential resulting in continual process improvement and greater buy-in. Learn how to focus your attention on what’s working and what is most important.

This high-level course covers strength-based methods for creating organizational development strategies for both teams and individuals.

- Define Appreciative Inquiry (AI)
- Apply the five principles of AI
- Use the AI dialogue when working in groups
- Critique group work and the proposed future visions of the department
- Identify potential revisions to the process including timelines and the endpoint

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## 2023 COURSE DESCRIPTIONS – Thursday

### **Communicating Effectively**, Mike Rooney

*Don't Just Be Heard, Be Understood and Appreciated*

Category: Human Resources

Level: Cornerstone

Communicating effectively is arguably the most critical skill for leaders at all levels. This course is a combination of discovery and skill building to improve participants' ability to communicate effectively. The content is designed to be applicable for new supervisors, experienced supervisors, and managers of supervisors.

- Identify your interaction style
- Practice adapting your style
- Understand the importance of preparation for a difficult conversation
- Prepare and practice for common difficult conversations
- Gain awareness of tips and traps when using technology to communicate

### **Driving a High-Performance Sales Team**, John Monroe

*Draw Out Hidden Potential to Solve the Unsolvable*

Category: Sales and Marketing

Level: Advanced

Generating sustained revenue growth in service-based industries is the result of executing an effective and consistent sales process—one that includes building referral relationships with those who can consistently refer work to your company. This course is not about theory. It's a hard-hitting discussion that draws on the instructor's quarter-century of sales management experience and applies it to managing for sales results in today's marketplace.

Learn how to get the most from your sales efforts by aligning your sales message and activities with accomplishing your sales and marketing objectives in several critical ways:

- Identify target markets and focus your message to address their concerns
- Align your target markets with accomplishing your sales and marketing objectives
- Establish real-world sales activity goals
- Use sales meetings to effectively manage sales activity and develop your sales team
- Utilize sales management reports to drive sales results

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**Finance for Small Businesses**, Jim Sullivan, CPA  
*Keep the Money You Make and Learn to Make More*

Category: Finance

Level: Elite

Now that you're making some money in your business, it's important to learn how to keep it. That comes from having a deeper understanding of the numbers and ratios on your financial statements and knowing how to use the information to sustain profitability as your company grows. This course will give you an easy-to-understand look at how to accomplish this and more. Just as important as understanding the numbers and ratios is establishing the disciplines within your company to consistently deliver them.

In this course, you will learn to:

- Better understand cash flow and its impact on your company
- Make your business more valuable for when it's time to sell
- Identify hidden trouble signs through three key ratios
- Keep more of your profits by understanding a few simple tax rules
- Understand the true costs of borrowing money

**“Me, Inc.”: Your Personal Brand is your True Competitive Edge**, Patty Beard  
*Stop Being a Commodity and Become a Brand That Attracts What You Need*

Category: Leadership

Level: *Cornerstone*

You've worked tirelessly to build and run your business. Your time and energy have been spent on developing technical expertise, running the operations, and managing expenses. But you're not exactly where you want to be. Maybe it's because you aren't taking critical steps to market you, which means you aren't even in the game. Personal Branding is what's giving today's best leaders and companies their competitive edge. Whether you realize it or not, you already have a personal brand. The question is: is it helping or hurting your business, and are you actively managing it to drive your business to that next level?

- Utilize the DISC assessment to understand how your personality is the foundation of your brand
- Identify how your current personal brand is helping and hurting you
- Connect with your core values and develop your personal mission statement and vision for the future you
- Create a compelling personal brand promise that defines who you are and what you promise to deliver to others
- Improve leadership skills and capabilities as you generate actions to deliver your personal brand promise to customers and employees

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### **Passing the Baton – Winning the Succession Race**, Chuck Violand and Timothy E. Hull *Legacy Leaders / Worthy Successors*

Category: Leadership

Level: *Advanced*

It has been said that “all good things must come to an end.” Fortunately, that doesn’t have to apply to business. When Entrepreneurs reach a point where they want to transfer ownership of their companies many struggle with how to do it successfully. Some contemplate selling them, passing them down to family, or even dissolving them. If the business is to live on, or if the owners are to maximize their return on their investment, one of the last responsibilities of a CEO is to successfully transfer the business to the next generation of leadership. The success of this rests heavily on how the CEO mentors potential successors as well as how the business and employees are prepared for this progression.

This program takes business owners and their successors through a process for preparing both for the transfer of ownership of a business. It explores in detail the mechanical as well as the emotional sides of succession. And, in a conversational style format, it delivers a heavy dose of candor along with sage advice and plenty of humorous interludes. This is a must for anyone who owns a small business regardless of their age or their current interest in selling.

- Preparing and planning for leadership succession
- Understanding the functional duties, roles, and responsibilities of each of the parties during the leadership succession of a business
- Managing the emotional impacts of leadership succession
- Preparing employees for new leadership

### **ROI of Happiness**, Kristy Frieden

*Proven Strategies for Becoming Happier and More Successful at Work*

Category: Leadership

Level: Cornerstone

The last several years have been some of the most challenging for employees and owners. Burnout is real in direct labor industries. The most effective employees are the most engaged, and from that, are able to use their passion to create positive change and healthy emotions. Learn how to overcome common stresses and issues weighing on all of us. Become happier and more fulfilled in your career while building a stronger culture and raising your personal level of well-being through this highly interactive and open course.

- Discover the relationship between happiness and success
- Understand the antidote to daily stress
- Identify proven strategies to increase your level of well-being and personal effectiveness
- Determine how to leverage your strengths, identify opportunities, and create the path necessary for change