ZISHI™

PROFESSIONAL DEVELOPMENT

LEARN WITH THE LEADING
FINANCIAL SERVICES TRAINING &
EDUCATION PROVIDER

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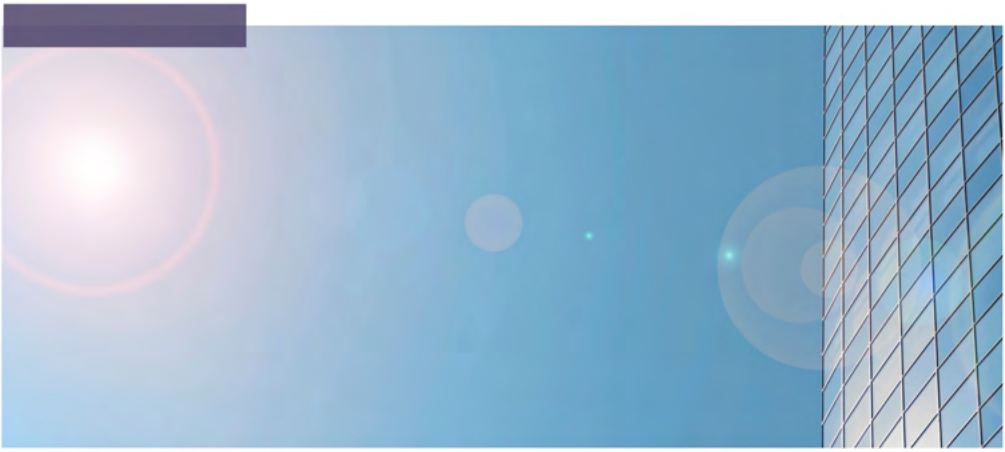

Welcome to ZISHI

Committed to unlocking success for your business, we have been empowering our clients to build **resilience through knowledge** for over 25 years.

A recognised global leader, we stand as the preferred and trusted training and education partner for a number of the world's most prestigious financial institutions.

Our cutting-edge, immersive learning experiences support the breadth of the financial industry, from some of the largest asset management firms and global trading exchanges to world-leading universities, sovereign wealth funds, energy companies, refiners, and investment, commercial and central banks.

Spanning all levels of trading qualifications, the maze of regulatory and compliance training and financial services professional development, ZISHI's expertise is unrivalled.

Our internal faculty of leading trainer-practitioners sets us apart. Delivering solutions uniquely crafted to bridge your business's knowledge gap, our wealth of educator experience and hands-on industry insight ensures your teams receive practical, up-to-date, and contextually relevant training.

Whether one-to-one or multi-faceted group deliveries, entry level or boardroom executives, and from design through to delivery, ZISHI is uniquely placed to become your trusted training partner, developing programmes and learning pathways to meet your specific operational needs.

Enabling informed decision-making and contributing to financial stability and wealth creation, we build **resilience through knowledge** across your business.

Powerful Learning Solutions

Blended learning for better results.

We believe in a whole-of-organisation approach to professional development training, and our blended learning approach utilises all the right tools in all the right ways.

Our multi-channel delivery options can be mixed and matched and guarantee a seamless experience through whichever methods you prefer.

Bespoke Content Creation

Looking for tailor-made learning solutions? We specialise in crafting personalised content that aligns seamlessly with your organisation's objectives.

Real-World Simulator-Based Learning

Take the learning experience to the next level with immersive, hands-on experiences that bridge the gap between theory and practice.

Curated Learning Journeys

For clients seeking comprehensive ongoing learning pathways, our digital learning team possesses the expertise and knowledge to support your long-term ambitions.

Rapid Deployment

Need to quickly roll out bite-sized, focused learning modules? We've got you covered with swift and effective solutions.

Digitising Existing Content

We excel at transforming your traditional learning materials into dynamic, interactive digital formats, breathing new life into your educational resources.

Professional Development

We understand that the key to success in today's financial markets lies not only in technical expertise but also in your personal and professional growth.

Our comprehensive range of courses span the spectrum of professional development from essential skills such as leadership, communication and report writing to presentation and negotiation skills and beyond.

We pride ourselves on our commitment to supporting and securing a resilient workforce, transforming the potential of those at every level within the sector. Whether out-of-the-box or a tailored solution, our courses provide participants with the tools and knowledge needed to excel.

Course Outlines

7 Resilience Under Pressure

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14 Building High Performance Teams

17 Presentation Skills

20 Problem Solving & Decision Making

Courses listed within this brochure are a representation of those we offer and can curate for your needs. Visit www.thezishi.com or speak to your sales representative for further information.

Page 25 gives further information about our tailor-made training solutions.

ZISHI™

Course outline

Resilience Under Pressure

Available as
In-house
In-person
Digital
Blended

RESILIENCE UNDER PRESSURE

With so much technological innovation, increasing pressure from workloads and aligning to regulatory requirements it is hard to maintain focus in an ever-changing world.

This workshop will provide you with tools and understanding to think strategically about building your resilience to deal with pressure in the moment.

How you think strategically will enable you to understand what is changing, why it's changing and the impact on you and the business.

LEARNING OBJECTIVES

- Discuss the challenges that working in a modern, hybrid world brings
- Understand the impact of structuring your day effectively
- Clarify what resilience is and what it is not
- Explore tool for managing stress filled situations

COURSE AGENDA

Maintaining focus (in an ever faster world)

Why is it harder to maintain focus in this world of so much technological innovation and how can I better use them?

- Explore challenges of modern / hybrid world
  - Always on and never off
  - Fragmented and connected
  - Overwhelmed and under prepared
- Getting prepared: Guidance on structuring your day
  - Covey grid
  - Planning: Eat the frog
  - Communication channel audit exercise
  - Planning capacity
  - Managing derailers

Building a resilience toolkit (to master your working day)

What is resilience (and what is it not!) and how can I prepare to be resilient when needed?

- How self aware of your level of resilience/ stress are you?
- How aware are you of the resilience level of others? And where are they now?
- The tools of the resilience tool kit
  - Behaviours: TKI model to highlight assertiveness and cooperativeness
  - Networking
  - The two hands model: I made a mistake, I need help
  - Stakeholder grid
  - Motivational theory: being clear with yourself and others about what motivates you

COURSE AGENDA

Managing yourself (as the pressure rises)

When I am feeling pressure / stressed why do I feel this way and what can I do to manage it?

- Define stress / pressure and why it is a good thing (historically)
  - Positive pressure / peak performance
  - Stress response
- How can I take more control / reduce my worry factor?
  - Understanding causes of stress (not just work - external stress also influences work and vice versa)
  - Application of Coveys circles model
- Tools for managing in stress-filled situations
  - Mental
  - Physical
  - Tactical
  - Technical

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Course outline

Finance for Non-Finance Managers

Available as
In-house
In-person
Digital
Blended

FINANCE FOR NON-FINANCE MANAGERS

Working in a business often means understanding the underlying commercial facts and figures.

This course aims to increase knowledge and confidence, by developing financial knowledge & skills, contributing towards improving performance against budget, management of costs and decisive action in cases of variance.

LEARNING OBJECTIVES

- Describe the key financial terminology relevant for them
- Define the nature of the costs of their team, and for the company overall
- Select and apply appropriate financial measures to financial statements to assess viability
- Define and demonstrate methods of budgetary management and their contribution to long term financial stability

COURSE AGENDA

- Introduction & Learning Objectives
  - Outline Agenda
  - Overall Objectives
  - Personal Learning Objectives
- Finance & Strategy – the bigger picture
  - How do you grow an organisation?
  - The Balanced Scorecard
- The Language of Finance
  - Income Statements
  - Cakes and slices

- The Nature of Costs
  - Fixed and variable costs
- Managing Budgets
  - Budgets: What, how and why
  - Flight plans – analogy
  - Advantages & Disadvantages
  - Set Out New Budget – do costs first then do income to cover
  - How can costs be cut without detriment?
  - Control & Influence

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Course outline

Building High-Performance Teams

Available as
In-house
In-person
Digital
Blended

BUILDING HIGH PERFORMANCE TEAMS

One of the huge challenges in a business is getting the balance between the management of individual performance and that of the group. High performing teams share a common set of characteristics which need to be developed.

The ability to build a team effectively is a critical leadership skill and a key performance differentiator between managerial leaders – teams are a reflection of their leaders' style of management. This training programme will equip participants with the skills and approaches necessary to build an effective team.

LEARNING OBJECTIVES

- Explain the core techniques and mindsets for building a high performing team.
- Understand the theories of Tuckman and Woodcock & Francis.
- Analyse their own team using these techniques.
- Understand the link between managerial style, the motivation of the team and team effectiveness.
- Describe the characteristics of a high performing team and analyse their own team for these characteristics.
- Analyse their personal team working style and preferences and those of their colleagues.

COURSE AGENDA

- 5 Circle Model
- Building teams
  - Building a high performing project team – Bruce Tuckman
  - Building a departmental / operational team - Woodcock and Francis
- The PDM High Performing Team Model – 12 factors, 4 types
- Managerial Leadership styles and preferences as a predictor of team performance
- The link between Managerial Leadership preferences and the 12 indicators of High Performing teams
- Building high performing teams by recruiting "the right fit". Belbin's Team Styles research
- Review of Belbin Team Roles Model and personal analysis

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Course outline

Presentation Skills

Available as
In-house
In-person
Digital
Blended

PRESENTATION SKILLS

This training course helps participants discover how to craft presentations around essential objectives, present key concepts and ideas with power and enthusiasm, design and present effective visuals, and employ techniques for mastering presentation delivery.

LEARNING OBJECTIVES

- Understand how to structure content to either inform or persuade.
- Recognise the importance of being message driven, particularly in an environment where attention spans are short and time is limited.
- Learn techniques that increase memorability and impact.
- Adopt a consistent, winning approach based on the audience's needs.
- Structure messages to influence a range of audience types, including skeptical audiences and highly knowledgeable audiences.
- Stimulate interaction and discussion with the audience / meeting attendees.
- Create slides that have impact and effectively support a presentation.
- Learn how to prepare themselves and their messages so that they consistently engage with the audience– and do so with impact.
- Ensure that all formal and informal discussions are consistently executed to best effect via a solid preparation platform-based process.

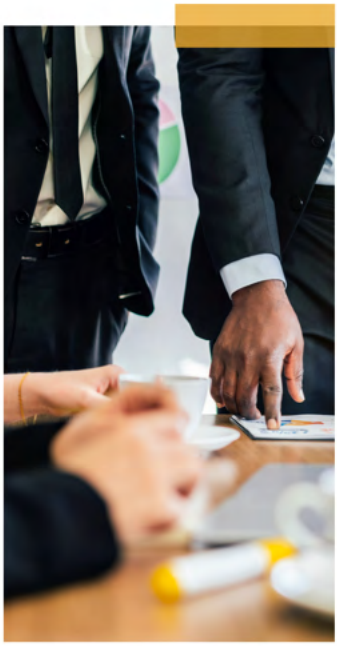
COURSE AGENDA

Best practice for presentations

- What makes a great presentation?

Form over content

- Structure is key to the success of presentations. An effective structure will help varied audiences understand and remember the key points contained in the message. This will be achieved most effectively if the preparation has been thorough and diligent.
- The Persuasive Presentation: The group will be taken through an efficient and focused way to assemble the presentation. This will include:
  - Selecting your key messages
  - Filtering additional information to support those key messages
  - Selecting the most appropriate and persuasive approach – Build & Conclude or State & Validate



How to create a presentation in 5 minutes

- Time is of the essence. Building on the structures discussed in module one, attendees learn how to develop cohesive and impactful presentations.

The process in action

- Populate template for a topic of their choice and then walk the group through their presentation.

Visual aids – the do's and dont's

- How to decide on the best visual aids to support your presentation. The group will discuss the options, what works and what doesn't work and conclude with some slide rules.

Questions and answers

- Delegates often flag 'questions and answers' as one of their biggest anxieties of presenting. Common fears are an inability to answer credibly or being taken off on a tangent with no ability to return. We will look at techniques to manage Q & A to best effect.

Course outline

Problem Solving & Decision Making

Available as
In-house
In-person
Digital
Blended

PROBLEM SOLVING & DECISION MAKING

This training course is aimed at those who wish to enhance problem solving and decision making capabilities in their organisation using creative approaches where appropriate.

This creativity is either demonstrated in the problem solving process through thinking "outside the box" or in the creative use of well-known tools and techniques.

The course will demonstrate various tools and techniques and will take participants through the techniques in the analysis of problems, identification, resolution and implementing of decisions.

The techniques will mean that you are equipped to compete against the best in the world when making commercially sound and rigorous decisions.

The programme will be centred on problem analysis and solution tools demonstrated across a range of problem solving situations with exercises, case studies and creative scenarios.

PROBLEM SOLVING & DECISION MAKING

LEARNING OBJECTIVES

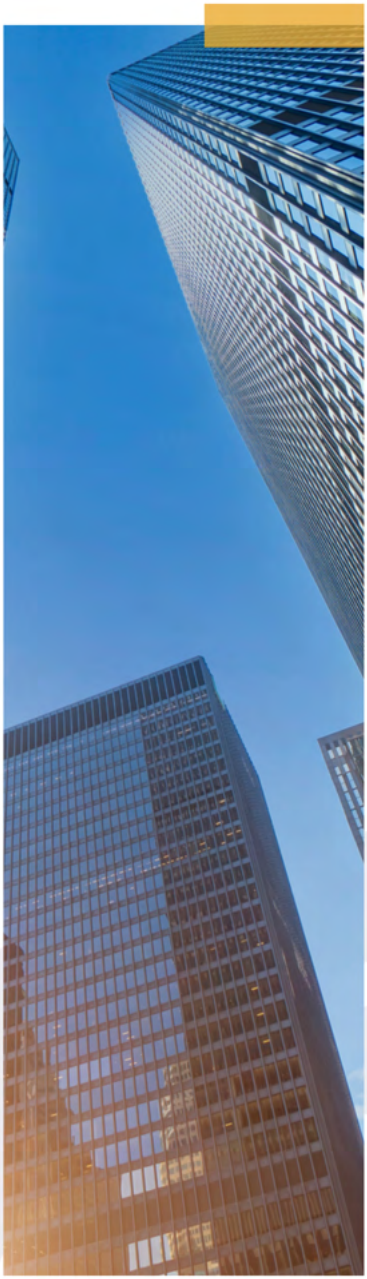
- Employ creative and practical tools to identify the real source of a problem.
- State clearly the problem in the form of an objective so that everybody involved in the process understands clearly what needs to be achieved.
- Use problem solving tools to reach creative and logical solutions.
- Use teamwork approaches and recognise their value in both problem solving and decision making.
- Reduce problem solution time and improve the creative quality of the decisions reached.

COURSE AGENDA

- Review of participant's typical problem types
- Defining creativity – working with a creative mindset – can everybody be creative?

Case examples: *Creative organisations – liberating staff to be creative*

- Identifying the real source of the problem
  - Problem definition
  - Researching the effects of the problem
  - Identifying those involved
- The principles of systematic problem solving
  - Diagnosing links
  - Establishing effective working methods
  - Methods for sharing data
- Theory input
  - Looking for cause and effect
  - Root cause analysis
  - Seeking workable solutions
  - Planning implementation
  - Monitoring and evaluating outcomes
- Team problem solving: Utilising individual styles and approaches to enhance team problem solving effectiveness
- Creative approaches
  - Thinking "outside the box"
  - Lateral thinking
  - Trial and error testing



COURSE AGENDA

- Theory and example input: Tools and techniques
  - Force Field analysis
  - Kepner – Tregoe Analysis
  - Paired Comparisons
  - Ranking and Rating
  - SWOT Analysis / 360 degree SWOT
  - Pareto Analysis
  - Ishikawa (Fishbone) Analysis

In-House Training

All ZISHI courses can be customised to your unique requirements.

Whether one-to-one or multi-faceted group deliveries, entry level or boardroom executives, and from design through to delivery, ZISHI is best placed to become your trusted training partner, developing programmes and learning pathways to meet your specific operational needs.

Whatever your professional development training requirements, we have the expertise, knowledge and ability to deliver first-class results at every level, every time.

CONTACT US

Please get in touch to discuss how our bespoke solutions already help world-leading financial services organisations meet their professional development needs and how we can do the same for yours.

Contact us today to discuss your requirements:

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Resilience Through Knowledge

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