

Short Courses

Management and Staff Development



Trainer Profile Debbie Boon

An approachable, practical and enthusiastic consultant.

Highly motivating, captures interest and obtains involvement at all levels.

Providing training and consultancy to UK businesses.

- Formerly the Business Development Director of BPP Professional Education in Jersey. Provided consultancy to organisations across the offshore sector, including the Channel Islands, Isle of Man and Cayman Islands.
- Senior Lecturer on the Management Papers for both ICSA and ACCA, and lectured on Chartered Management Institute papers for Jersey Business School. Designed training material and assessment centres for the Jersey Business School on their CMI and CIPD professional programmes.
- Subsequently as a freelance consultant, worked closely with organisations in the Channel Islands covering all sectors, and delivered personal effectiveness and management training for the States of Jersey for over 14 years.
- Expertise covers business strategy development and implementation, and management development, particularly performance management and HR.
- Until leaving Jersey, was an active member of the Jersey Chartered Institute of Personnel and Development (CIPD) committee, and organised and hosted 3 annual world class conferences on their behalf.

Accelerated Learning (1/2 Day)

Overview

Learn how to develop your memory skills and apply memory techniques to any study activity. Spend less time and increase the effectiveness of your study.

Session Outlines

- Overcoming barriers to studying effectively
- Fundamental principles of memory
- Increasing concentration and comprehension
- Mind mapping to improve note taking, report writing and studying
- Effective reading - increase speed, comprehension and retention
- The OSQR3 method for effective study

Pre-requisite knowledge

None - just an open mind.

Effective Meetings and Minute Taking (1/2 Day)

Overview

An essential management tool. Stop wasting time, and increase the positive outcomes of every meeting you run.

Session Outlines

- Preparing for the meeting - drafting agenda and other paperwork, practical arrangements
- Principles of minute writing - format and structure, language and style, contents, accuracy, action points
- Note taking and summarising
- Encouraging participation and handling difficult situations

Pre-requisite knowledge

Suitable for anyone responsible for running meetings or taking minutes.

Business Plan Writing (1/2 Day)

Overview

Increase the chances of your business plans gaining approval and achieving objectives.

Session Outlines

- To equip managers with the essential elements of business planning in order to set, plan and achieve organisational/departmental objectives
- The planning process
- Situation analysis
- External analysis
- GAP
- Action development and target setting
- Financial modelling
- Structuring and formatting the plan

Pre-requisite knowledge

Aimed at senior managers and departmental managers involved in business plan writing.



Onestudy Training Limited

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Short Courses

Management and Staff Development

Managing within the Law (1 Day)

Overview

A perfect course for all people managers - at any level. Increase productivity, motivation and retention (and avoid tribunals!).

Session Outlines

- Recruitment & Selection process
- Importance of probation period - setting objectives
- Performance Management and Review - giving appropriate feedback
- Disciplinary and grievance procedures
- Process of termination of employment
- Importance of documentation and adherence to policy

Pre-requisite knowledge

None.

Managing Client Relationships (1/2 Day)

Overview

More than just another 'customer services' training course. This course introduces customer relationships and provides immediately useable tools to improve customer services.

Session Outlines

- Promoting the quality image and values of the organisation
- Dealing with enquires
- Effective communication with clients
- Becoming client orientated
- Developing systems and records for maintaining excellent client relations
- Attention to detail

Pre-requisite knowledge

None.

Assertiveness (1/2 Day)

Overview

Getting to 'yes', but also being able to say no.

Session Outlines

- The difference between aggressive, passive and assertive behaviour
- Non-verbal communication and what it means
- How other people's behaviour can affect us
- Assertive techniques, what are they
- When not to be assertive

Pre-requisite knowledge

Anyone who has to be able to communicate with people at all levels.

Personal Productivity and Time Management Principles (1/2 Day)

Overview

This is not just about prioritising lists, but also about simple techniques for clawing back precious moments and overcoming time wasters.

Session Outlines

- Establish what your attitudes and behaviours to time are, and the impact of this on how you manage time
- Identify your time wasters, and how best to overcome them
- Getting organised - goals, planning, daily to do lists

Pre-requisite knowledge

None.

Shaping futures

- **A local company nurturing local talent**
- **Outstanding pass rates**
- **Limited class sizes - mentoring approach to tuition**
- **No Pass, No charge policy***
- **Credit scheme[#]**
- **Go Green** We only use sustainable paper for all our student material
- **Easy online access for booking and downloadable useful learning packs**
- **Give us a try and find out for yourselves**

*Students must have attended all tuition sessions for their duration and attempted all mock exams to qualify
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Short Courses

Business & Professional

Introduction to Offshore Companies & Administration

(1 Day)

Overview

The course is designed for relative newcomers to company administration.

Emphasis is placed on the practical side of the role in order that delegates can return to the workplace with a better understanding of the rationale behind their day to day activities.

Course Outline

- The purpose of company law, limited liability, protection for members and creditors
- The method of formation and registration of a company
- Taxation
- The role of directors and the company secretary
- Different types of share capital, allotments and transfers
- The requirements of the company under the law
- Audit and accounting requirements
- Company meetings, notice and minutes
- The memorandum and articles of association
- Statutory records
- Company liquidations
- The duties involved in being a company administrator
- Why Jersey?

Pre-requisite knowledge

No knowledge of the subject is required.

Introduction to Offshore Trusts and Administration

(1 Day)

Overview

It is suitable for individuals who have recently moved to a trust department or persons who have no knowledge of trusts but would like to improve their awareness of this area.

This course is highly interactive and uses many practical exercises to introduce the student to real administrative tasks.

Course Outline

- What is a trust?
- Parties to a trust: Settlor, Trustee, Beneficiaries
- Common terms and phrases you will see
- Who sets up a trust and why
- A quick appreciation of a Trust Deed
- Duties and Powers of trustees
- Types of beneficial interest
- Types of trusts
- Trustee minutes, file notes, checklists

Pre-requisite knowledge

No knowledge of the subject is required.

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Short Courses

Business & Professional

Demystifying Company Formation (2 Hours)

Overview

This seminar is aimed at those within the finance sector and those who are thinking of starting their own business or changing from a sole trader to a Limited Company.

Course Outline

- Why form a company?
- The steps involved
- Documentation required
- Record-keeping requirements
- Statutory requirements
- Ongoing requirements

Pre-requisite knowledge

No knowledge of the subject is required.

Demystifying Company Liquidation (2 Hours)

Overview

This seminar is an ideal introduction for those who need to know how companies are liquidated. It is aimed not only at those within the finance sector, but also at those who are thinking of winding up their company's affairs.

Course Outline

- Reasons for liquidation
- Voluntary liquidation
- Compulsory liquidation
- Striking off
- The role of the liquidator
- The liquidator's report
- Case studies

Pre-requisite knowledge

No knowledge of the subject is required.

Introduction to Investments (1 Day)

Overview

Designed for relative newcomers to investments, this course aims to provide delegates with a basic understanding of various types of investments and their uses.

Course Outline

- Introduction to the Stock Market
- Introduction to UK equities
- Share prices and yields
- An introduction to UK Gilts and Bonds
- Overseas investments
- Offshore Funds
- Fund dealing, valuation and price calculation
- Risk and return
- Asset allocation
- Accounting for investments
- Investment ratios
- Taxation issues
- The Regulatory Environment
- The Economic Environment

Pre-requisite knowledge

No knowledge of the subject is required.

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Short Courses

Financial

Reviewing and Interpreting Company and Trust accounts

(1/2 Day)

Overview

This course is designed for personnel involved in the review and/or sign off of trust and/or standard limited company accounts.

Course Outline

- Components of financial statements
- Review checklist and process
- Assessing financial health of a company using ratio analysis
- Substance over form
- Review of different types of trust accounts
- Typical entries which raise queries:
 - Foreign Exchange
 - Accruals and prepayments
 - Acquisition and disposal of Investments

Pre-requisite knowledge

An understanding of the element of financial statements i.e. assets, liabilities, income and expenses, would be useful.

How to Value a Company

(1/2 Day)

Overview

This seminar is designed for those who need to know how to value a private company.

Course Outline

- Purpose of the valuation
- Valuation techniques
- The dividend valuation method
- The net assets approach
- Future maintainable profits
- Discount for non marketability
- Assumptions used
- The valuation report
- Case studies

Pre-requisite knowledge

No knowledge of the subject is required.

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Short Courses

Financial

Overview

These courses are designed for personnel who are new to accountancy and/or administrators who would like to obtain an overview of accountancy transactions.

They are designed for the offshore environment, encompassing investment, loan, property and other popular company and trust transactions.

Emphasis is placed on the practical side of the role in order that delegates can return to the workplace with a better understanding of the rationale behind their day to day activities.

Introduction to Trust and Company Bookkeeping (1 Day)

Course Outline

- Companies first transactions
- Trust first transactions
- Double entry bookkeeping for:
 - Stand-alone companies
 - Stand-alone trusts
 - Company and trust structures
- Trial balance
- Investment schedules
- Correction of errors
- Buying and selling investments
- Property transactions

Pre-requisite knowledge

No knowledge of the subject is required.

Preparing Company Accounts (1 Day)

Course Outline

- Understand the elements of Financial Statements
- Prepare a set of Financial Statements from trial balance
- Accountancy adjustments:
 - Revaluation
 - Correction of errors
 - Depreciation
 - Investments
- Notes to the accounts
- Directors reports
- Cash flow statements

Preparing Trust Accounts (3 Hours)

Course Outline

- Income account
- Capital account
- Different accounting treatments of income and capital
- Preparing trust accounts
- Definition of trust property and its accounting treatment

Pre-requisite knowledge

A basic bookkeeping knowledge of assets, liabilities, income and expenses, debits and credits.

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