

# The Organisational Context

“A clear path to a genuine understanding of the business environment for professional people”

*A training event to help professional and technical staff to understand the business environment that they work within in order to add appropriate additional value using*

DEVER TRAINING  
AND  
DEVELOPMENT

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## **Focussed, Practical and Highly Relevant - Three Day Course**

This course tackles the key business issues which today's professional has to confront, within an increasingly competitive commercial environment. It will provide thorough instruction on critical business skills, which the professional will be able to draw on throughout their careers.

Professional people can all too easily become engrossed within their own particular speciality; to the detriment of wider ranging priorities within their organisations. This course will widen the scope and vision of professional and technical staff; enhancing commitment and motivation and adding greater value to their organisations.

Business analysts, I.T. professionals, technical and Human Resources teams, in fact any job role that does not contain a general business mandate, would benefit hugely from this course.

The course can be regarded as a crucial foundation in general business studies, exploring how businesses are formed and managed, with particular emphasis on financial matters.

The subject of finance is delivered in a straight forward "jargon" free manner and is intended for managers and staff who are not from a financial background, empowering them with confidence and credibility. Even finance professionals could use this as a powerful "refresher".

Major legal issues, relevant to the job roles of attending delegates, will be examined and clarified.

This course is designed as a thorough introduction to understanding the business environment for a wide audience of technical and non technical professionals in preparation for an appropriate certificate/qualification.



## Content Overview.

The course will deliver a clear understanding of:

- Government legislation and its affect on businesses and how they are run.
- The different of types of organisation, including: private sector, public sector and not-for-profit organisations (the third sector).
- Financing a start-up company covering why capital is needed and the legal processes of setting up a business, including; the business plan and sources of business finance.
- How to manage finance by fully understanding the balance sheet, the profit and loss account and the cash flow statement.
- The use of financial ratios to better interpret business performance.
- The importance of working capital and liquidity within any organisation.
- The best approaches towards costing and the principles of budgeting.
- How to manage cash flow and the importance of cash flow forecasting.
- Investment appraisal techniques, including; break even or payback, discounted cash flow (including Net Present Value) and Internal Rate of Return.
- Organisational structure, with examples of and the effectiveness of different types of structure using various organisational models, including; the issue of centralisation versus decentralisation.
- Span of control and its relationship with the scalar levels of structure and the appropriateness within different types of business are discussed.
- The roles of traditional functions: Sales, Marketing, Operations, Procurement, Finance and Human Resources and how new business models are challenging these traditional roles.
- Plain English review of various legal issues pertinent to the professional scope of attendees, which may include if appropriate:
  - Anti-discrimination legislation.
  - Anti competition legislation.
  - Health and Safety.
  - Anti Money Laundry Regulation
  - Consumer Credit Law.
  - Software contracts and liability
  - Intellectual property rights
  - Data protection, privacy and freedom of information

- Internet issues
- Computer misuse

## On Completing the course the delegates will:

- Describe the range and type of business organisations in the UK.
- Describe the advantages and disadvantages of a range of management structures operated within organisations.
- Describe the work carried out by key functions found within organisations.
- Explain legislative issues affecting their own professional area.
- Describe the range of activities carried out by financial and management accountants.
- Interpret the contents of the balance sheet and profit and loss account.
- Use investment appraisal, costing and cash flow forecasting techniques.

## Who Should Attend:

This course is ideal for those preparing for professional qualifications where a good basis in organisational context is required, e.g. ISEB, as a foundation unit prior to taking examinations elsewhere.

Examples of typical attendees who would benefit from this course would be: business analysis professionals, I.T. professionals, architects, surveyors, medics, pharmacists, dentists, vets, head teachers or any profession whose training is technically based and requires some degree of business context.

## What This Course Is Not About:

This is not about cribbing for a particular examination, in the last afternoon of the course, as is commonly found; or ticking a box in an accreditation process, but is a solid business studies course giving a good understanding of key business concepts and best business practise.

## Expectations of Delegates:

This course will be designed to be of similar level to a level 4 National Qualification Framework (NQF) and the material will be presented appropriately.

Delegates will be expected to get involved and contribute to group exercises and discussion using experiences within their own organisations.



# Trainer Profiles.

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## **Geoff Kontzle**

Geoff has over 25 years experience in a variety of parts of the financial services industry. He was previously Head of Public Sector at Alliance & Leicester Plc and held a Director position at Capita Group Plc ( Sector Treasury Services Ltd). He has held a number of senior management appointments within the Barclays Bank Group of companies.



Geoff regularly publishes articles on the Public Sector use of finance and has delivered a number of lectures on the subject in the UK and across Europe.

Geoff tutors in procurement and general business studies in further education colleges in Hampshire and is experienced in teaching young people and adults at a variety of levels including foundation degrees and BTEC. Geoff holds a Preparing To Teach in The Life Long Learning Sector (PTTLS) certificate which is the threshold qualification for teaching for publicly funded training.

## **David Winders**

David has a background in project and change management since the mid nineties; whilst at Barclays Bank Group in he specialised in finance training for equipment manufacturers and their sales networks. At Dell Financial Services, and Centrica he developed a career in project management business analysis and business change.



More recently David has supported a variety of organisations including: AXA, Bank of Ireland, Iveco-Finance, NAGE, Serco and Skandia Life where he has had a focus on training and skills transfer to permanent members of staff. David trains in business architecture, organisational design, project and business analysis matters; David also holds a PTTLS qualification.



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**Paul Collis**

A career spanning 25 years in the financial services sector has produced a proven track record of achievement in a number of key financial disciplines.

Expertise has been gained through important roles in a number of companies, commencing with Barclays Mercantile in the mid/late 1980's, with exposure to the world of corporate financial sales.

The recession of the early 1990's involved working closely with SMEs to turn their fortunes around and involved critical people management skills. By the mid 1990's the considerable financial expertise acquired prompted a move into the realm of risk/credit management.

After leaving Barclays Mercantile in 1997, there followed a number of senior risk management positions in the period 1998 to 2004 with organisations such as: Tokyo Leasing UK Ltd., De Lage-Landen Leasing Ltd., First National Motor Finance Ltd., and Hitachi Capital Business Finance Ltd.

Training/coaching had always been a passion. Opportunities to participate in the design and implementation of many financial induction programmes were always welcomed, whether in-house or delivered through professional associations. In 2004 the decision was made to pursue a full time commitment to finance training, focusing on the successful delivery of courses on the following subjects: risk analysis/credit underwriting, finance for non financial managers, budgeting and working capital management.

Paul is a member of ITOL (Institute of Training and Occupational Learning) and holds the following ITOL qualification: "Certificate in Training and Occupational Learning".

