

Records Management Conference

Dates	Location	Fees (\$)
19 th -23 rd February	Nairobi	1500
15 th -19 th July	Mombasa	1500
25 th -29 th November	Dubai	3500

Introduction

Records management involves the electronic storage of organization documents, physical storage of paper documents, custodial retention of cash equivalents, archive management, and use of third parties. To ensure the safety of organizational information an effective system for record management and archiving is required. The business processes of institutions are improved by the presence of a good record management system. At the end of this course participants ought to have gained the knowledge and skills of efficient and effective record management and archiving.

Course Objectives

By the end of the course, participants will be able to:

- Undertake recordkeeping analysis for an organization.
- Design a record management plan.
- Implement a record management system.
- Learn about the record management best practices.
- Understand monitoring and controlling of a record management system

Duration: 5 Days

Who Should Attend

This course targets all Records Management Professionals, Information Scientists, Secretaries, and all Key Personnel responsible for records in their organizations. The course also targets all individuals who want to improve their record management systems.

Course Outline

Day 1: Records Management Fundamentals

- Introduction to records
- Records content context and structure
- Record management
- Records management regulatory environment
- Record management system characteristics
- Record management system components

Day 2: Record Management Processes

- Identification of documents to be captured as records.
- Life cycle of Records
- Record life cycle management best practices
- Records disposal implementation
- Records management process documentation

Day 3: Records Management Policy & Control

- Records management policy objectives
- Responsibilities of Record management
- Record management policy Key provisions
- Training and Competence
- Potential hazards assessment
- Policy and procedures that protect important documents.
- Methods of protecting records
- Vital documents protection plan implementation

Day 4: Electronic Records Management

- Electronic record types
- Introducing Electronic Records Management
- ERM management challenges
- Electronic Recordkeeping System (ERKS)
- Implementation issues of ERM and ERKS

Day 5: Records Management Standards

- ISO 15489
- ISO 23081
- ISO 30300
- ISO 30301

General Notes

1. This course is delivered by our seasoned trainers who have vast experience as expert professionals in the respective fields of practice. The course is taught through a mix of practical activities, theory, group works and case studies.
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Implementation of Modern Records Management through SharePoint & Office 365 Conference

Dates	Location	Fees (\$)
27 th -31 st May	Nairobi	1500
11 th -15 th November	Nairobi	1500

Introduction

Managing information and records, which are now one of the most valuable assets of the company represents a challenge in the modern world of digitalization where the companies are becoming digital enterprises and the data managed must get the new names of data lakes and even the data oceans.

As most of the companies use the Microsoft Office programs and therefore the logical solution for the Document Management will be to continue with the use of SharePoint. The people within the companies should be well prepared for the challenges that this is bringing.

Delivering information management solutions on SharePoint can be challenging, as the Microsoft product offers very large number of options. In this training course, delegates will apprehend how to combine the information management knowledge and apply it to SharePoint in ways that make it easy to use today and adaptable to the needs of the future. This training course is ideally suited for any company that needs to build information management solutions on SharePoint or use the product family related to SharePoint.

This PASI training course will highlight the elements, principles and implementation paths for modern information management challenges which require adaptability of the solutions to the realm of Big Data environment and changing spectres of regulations.

Conference Objectives

- Create information and documentation procedures and requirements in SharePoint.
- Understand Information Management in SharePoint and Office 365
- Recognize Effective Information Architecture for SharePoint and Office 365
- Acquire the knowledge on how to manage email.
- Understand the relation between records management and the cloud.
- Apply Privacy and data protection rules in SharePoint.
- Recognize the way to implement decommissioning of legacy systems and user information.
- Prepare Business and functional requirements for a digital record-keeping solution.

DURATION: 5 Days

Who should attend?

This conference targets all professionals involved in data analysis, presentation, and graphic design, but will be especially beneficial for: Document Controllers, Secretaries, Administrators, Project Managers, Communication Specialists, Marketing Managers and Public Relations Specialists and Business Development Managers

Course Content

Day 1: Records Management as a Business Enabler

- Enterprise Content Management through the Record Life Cycle
- Record Capture
- Digital Records
- Paper Records
- Record Retention and Disposition
- Records Management and the Cloud

Day 1: Records and Document Management in SharePoint and Office 365

- SharePoint Online Architecture
- Configuring SharePoint
- Site Administration
- Search Settings in SharePoint

Day 3: Office 365

- Office 365 and the Client Device
- Office 365 Supportability
- Architecture of OneDrive for Business
- Change Management in Office 365
- Data Protection in Office 365

Day 4: Content Migration to SharePoint

- Migration Phases
- Requirements (*Discovery*)
- Preliminary Design (*Content Inventory*)
- Final Design
- Test Phase
- Go Live Phase
- Migration Scenarios

Day 5: Managing Governance, Security, and Compliance with SharePoint

- Service Assurance with SharePoint
- Managing Permissions in SharePoint
- Designing User Experience with SharePoint
- Select and Configure Information Protection Tools with SharePoint
- eDiscovery Requests Compliance in SharePoint
- GDPR and other Audit Tools for SharePoint

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Professional Skills for Administrators & Secretaries

Dates	Location	Fees (\$)
25 th -29 th March	Nigeria	2500
24 th -28 th June	Nairobi	1500
25 th -19 th November	Dubai	3500
09 th -13 th December	Uganda	1500

Introduction

This practical and highly popular PASI Professional Skills for Administrators & Secretaries training course enables new and developing office professionals to make a powerful and positive impact in the workplace. It focuses on the essential core competencies that you will need to project a confident and efficient persona. Underpinning this is an in-depth exploration of the behaviours and skills necessary to achieve and sustain excellence in your office environment.

This engaging, fun, and interactive Professional Skills for Administrators & Secretaries training course will help you to become more organised, to plan and prioritise and to make effective decisions. It will help you to plan and set meaningful objectives. It will give you the tools to become an excellent communicator and to be that valuable employee who can deal calmly and effectively with difficult situations and people. It will also help you to create a harmonious and pleasant working atmosphere by teaching you how to deal with the pressure and stress of the modern office.

Conference Objectives

- Apply the skills and attributes of a first-class office professional in your workplace.
- Present yourself more confidently.
- Communicate effectively with managers, colleagues and all organisational
- Handle the difficulties and pressures of working in a modern office.
- Prioritise, plan, and manage time more efficiently.

DURATION: 5 Days

Who should attend?

This conference is suitable for a wide range of professionals but targets, Administrators, Secretaries

Executive Assistants, Personal Assistants, Office Managers, Supervisors, Business Support staff.

Course Content

Day 1: Competencies and Time Management

- Assessing prior Skills and Knowledge
- Competencies Required for Excellence as an Office Professional
- Perceptions, Attitudes and Beliefs – *How they affect Performance.*

- aLearning Styles / Thinking Styles – *Your Strengths and Weaknesses*
- Time Management Skills

Day 2: Organizing and Planning

- Goal Setting including Setting SMART Objectives
- Planning
- Mind Mapping
- Problem Solving and Decision Making
- Managing Meetings

Day 3: Communication Skills

- Understanding Assertive Communication
- Dealing with Conflict and Aggression
- Listening Skills
- Questioning Skills
- Body Language and Its Importance in Building Effective Relationships

Day 4: Team Orientation

- Conflict Management and Resolution
- Dealing with Difficult People
- Managing Upwards
- Workplace Stress Management
- Working Effectively as Part of a Team

Day 5: Presentation Skills

- Telephone Skills
- Writing Skills
- Email Etiquette
- Presentation Skills
- Review of the Week

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Advanced Budgeting and Cost Management

Dates	Location	Fees (\$)
25 th -29 th March	Ghana	2500
06 th -10 th May	Uganda	2500
26 th -30 th August	Nairobi	2500
09-13 th December	Uganda	2500

Introduction

This advanced Budgeting & Cost Management Conference provides participants with key cost awareness and budgetary skills, which are essential for managing and controlling resources in times of increasing global competition where the budgets are inextricably linked with both the achievement of strategic objectives as well as with evaluation of future plans and initiatives.

Budgeting and cost analysis are crucial elements for the management of contemporary organizations. Nowadays, if companies want to stay competitive, they are urged to link their strategies with accurate systems of resource allocation and performance measurement.

Along this line, budgeting, as well as tracking, controlling & reducing cost represent essential activities to be performed and monitored by organizations as they implement their key processes, activities, and operations. In addressing these issues, this training course is relevant for those professionals & analysts facing the difficult challenge of improving performance while reducing costs of those processes for which there are accountable.

Conference Objectives

- Refine costing and budgeting terminology used in business.
- Understand the importance of a well-defined costing and budgeting process.
- Determine full costs of outputs for the goods and services provided.
- Master traditional techniques and recent best practices on budgeting / cost management
- Link finance and operation for budgeting purposes and strategy execution
- Learn how to build a comprehensive performance measurement system.

DURATION: 5 Days

Who should attend?

This conference is suitable for a wide range of professionals but will greatly benefit: Budget Staaf, Financial Controllers, Treasury Accountants, Management Accountants, Financial Professionals, Professional R&D, Sales / Marketing Professional, General Accounting Professional, Business Unit Professionals and Procurement Professionals.

Course Content

Day 1: The Relevance of Budgeting and Cost Management within Strategy Execution

- The Link between Strategy, Planning, Budgeting and Cost Management
- Why Budgeting and Costing are so important to manage your company?
- Towards a Cross-functional Process-view of the Organization
- Financial vs. Managerial Accounting (Where you get information for decision-making)
- Understand your Processes: Integrating Financial and Non-financial Aspects
- Identify and Discuss the Key issues in terms of Budget / Costing for your own Organization

Day 2: The Budgeting Framework and its Role within the Management Process

- The Role of Budgeting within Management Accounting
- The Value of Budgeting in your Company
- Behavioral Implications of Budgeting
- Key Concepts and Terminology
- Advantages and Disadvantages: Critical issues to be Discussed.
- Overview on the Financial Statements - Balance sheet, Income statement and Cash-Flow

Day 3: Cost Management for Budgeting Purposes

- Cost Concepts and Terminology
- Different Costs for Different Purposes
- Fixed vs. Variable Costs: The Cost-Volume-Profit Analysis Model
- Contribution Margin Analysis
- Manufacturing vs. Non-manufacturing Costs
- Period vs. Product Costs: Inventory Evaluation and Control

Day 4: Traditional vs. Advanced Techniques in Cost-control

- Under-costing and Over-costing: The Consequences for Profitability
- How to refine a Costing System?
- Indirect vs. Direct costs: Traditional Cost Allocations Systems vs. Activity-Based Costing
- Cost Drivers: Linking Resources, Activities and Management
- Introducing Activity-Based Budgeting (ABB) and Management (ABM)

Day 5: Broadening the Performance Measurement Systems

- Shortcomings of Traditional Approaches to Budgeting and Performance Measurement
- Need to Link Financial to Operational Issues
- Recent Best Practices: The Balanced Scorecard and Six-sigma
- Financial Perspective and Customer Perspective
- Internal Business Process Perspective and Learning & Growth Perspective
- Developing and Adapting the Scorecard

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Treasury and Risk Management

Dates	Location	Fees (\$)
08 th -12 th April	Mombasa	2500
29 th July-2 nd August	Uganda	2500
28 th Oct-01 st November	Nairobi	2500

Introduction

The Treasury & Risk Management function is essential to the success and sustainability of all leading corporate organisations. Never has this been truer, given the ever-increasing pace of change in regulation, compliance, technology, and financial risk.

Treasury Management ensures sufficient liquidity to meet obligations, whilst managing payments, receipts, and financial risks such as Credit Risk, Oil Price, Exchange Rate, and Interest Rate Risk effectively. In addition, effective Treasury & Risk Management will enable companies to make informed and better strategic decisions, providing the analysis, finance, and risk assessment.

The aim of this conference, therefore, is to provide participants with the knowledge and skills to make an effective contribution to the Treasury & Risk Management function.

Conference Objectives

- Manage Cash, Liquidity & Working Capital to reduce finance costs and improve returns
- Recommend appropriate Methods of Short-term and Long-term Finance
- Evaluate Capital Investment Opportunities
- Determine and implement the company's Risk Management Strategy
- Recommend Hedging and Risk Management Decisions

DURATION: 5 Days

Who should attend?

Given the importance of the Treasury & Risk Management, this Conference will greatly benefit:

Treasury & Risk Management Professionals, Financial Decision-makers, and managers and those with financial responsibilities.

Course Content

Day 1: The Role of Treasury Management – An Overview

- The Role & Scope of Treasury Management
- Operation & Location of a Treasury Department – *Cost or Profit Centre; Centralised or Decentralised*
- Cash & Liquidity Management
- Working Capital Management
- Capital / Finance Management

- Risk Management

Day 2: Cash & Liquidity Management – A Detailed Analysis

- Cash Forecasts: Role & Preparation
- Investment of Cash Surpluses to Maximize Return
- Meeting Cash Calls and Short-Term Cash Shortages / Short Term Finance
- Working Capital Management – *Determining the Optimum Level*
- Multi-national & Group Cash Management
- Cash Budgets: Process & Control

Day 3: Financing and Capital Management

- Strategic Objectives: Consolidation, Growth, M & A; Joint Ventures, Diversification, etc.
- Financing Strategic Objectives / Long Term Finance (*Public & Private Equity v Buyer & Supplier Debt*)
- Optimizing the Capital Structure to Minimize the Cost of Capital (WACC)
- The Capital Asset Pricing Model (CAPM)
- Capital Investment Appraisal – *NPV; IRR, Payback*
- Capital Rationing: Internal & External

Day 4: Risk Management

- Identifying Risks and Uncertainties – *Internal & External; Financial & Non-Financial*
- Measuring Risk – *Volatility; Variance; Standard Deviation; Probability; Value at Risk*
- Determining the Risk Management Strategy – *Assessing Impact and Probability*
- The 4 T's – *Tolerate; Terminate; Transfer; Treat.*
- Internal Controls & Internal Auditing
- Credit & Counterparty Risk Management

Day 5: Currency, Interest Rate & Commodity (Oil Price) Risk Management

- Forward Contracts and Forward Rate Agreements
- Options – *Calls & Puts; European & American*
- Futures – *Market Correlation; Margin Payments, etc.*
- Swaps – *Currency & Interest Rate Risk and Benefits*
- Foreign Currency Accounts Other Internal Methods / Tactics
- Foreign Currency Borrowing

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Auditing Corporate Governance; Assessing your business direction

Dates	Location	Fees (\$)
15 th -19 th July	Mombasa	2500
07 th -11 th October	Uganda	2500
11 th -15 th November	Nairobi	2500

Introduction

Corporate Governance is now one of the hottest topics in the business world. It is both a regulatory requirement and a business enabler.

But do you know whether your Corporate Governance activities are extracting maximum value? If not, this is probably because your Internal Audit team have not assessed this key topic.

This audit approach is crucial as the Board and the Audit Committee need comprehensive assurance about this strategic business process.

This Auditing Corporate Governance training course will provide all the tools and techniques essential to audit the complex and wide-ranging field of Corporate Governance. It will help you ensure that you are applying the very best practices and meet all regulatory requirements.

Conference Objectives

- Audit the risk management process.
- Meet stakeholder expectations regarding Corporate Governance (CG)
- Assess the effectiveness of business continuity planning.
- Assist the Audit Committee in their Corporate Governance (CG) role.
- Assess sustainability and environmental governance.
- Audit joint ventures and partnerships

DURATION: 5 Days

Who should attend?

This conference is suitable for a wide range of professions but will greatly benefit; Board Managers, Joint Venture Coordinators, Lead Auditors, Senior Auditors, Audit Managers, Corporate Governance Managers and Managers needing a broader understanding of how to review Governance maturity.

Course Content

Day 1: The Corporate Governance Requirements

- Key Aspects of Corporate Governance
- Governance Assessment Techniques
- The business environment
- Analysing and Assessing the Effectiveness of Governance Controls

Day 2: Preparing for the Governance Audit

- Scoping a Governance Audit
- The Need for Governance Audit of the Board
- The 15 Key Governance Board Risks to be Reviewed.
- Auditing the Overall Risk Management Process
- Evaluating Risk Appetite

Day 3: Reviewing the Key Aspects of Governance

- Auditing the Audit Committee Process
- Auditing Reputation
- Corporate Social Responsibility
- Sustainability and Environment Audit

Day 4: Auditing Other Key Governance Activities

- Auditing IT Governance
- Auditing Joint Ventures and Partnerships
- Reviewing a Current JV or Partnership
- Auditing Business Continuity Planning

Day 5: Auditing Technology Governance and Regulatory Compliance

- Reviewing Key Controls Over Technology
- Assessing Management Information Governance
- Communication Internally and Externally
- Ongoing Evaluations to Ascertain Whether the Components of Internal Control are Present and Functioning

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Advanced Office Management and Effective Administrative Skills

Dates	Location	Fees (\$)
29 th April-3 rd May	Dubai	3500
15 th -19 th July	Mombasa	2500
09 th -13 th September	Mombasa	2500
04 th -08 th November	Uganda	2500
16 th -20 th December	Dubai	3500

Introduction

This highly interactive Advanced Office Management & Effective Administration Skills training course will help you to develop and refine the skills needed to excel as an Office Manager, Administrator or Executive Secretary. It will explore in depth the interpersonal and behavioural skills necessary to ensure you are well prepared for the challenges of working with a variety of management styles. On this Office Administration training course, you will also learn how to stay in control whilst dealing with conflicting priorities.

Becoming more effective as an Office manager will make your job easier and make you more valuable in the eyes of your managers and the company stakeholders. Office Managers need to be expert multi-taskers – even if you’re doing more than four things at once, that’s probably still not enough! You need to be indispensable – to know exactly who to call to fix that pesky problem your boss has. And to be truly indispensable you need to be organised, be an excellent communicator, and be able to deal with whatever challenging situation your working life presents you with. This Advanced Office Management & Effective Administration Skills training course will help you to do that.

Conference Objectives

- Recognise how to prioritise and cope with multiple tasks.
- Develop the skills necessary to plan, make effective decisions and solve problems, and handle pressure.
- Apply practical techniques to improve communications skills.
- Understand how to manage challenging behaviours.
- Apply assertiveness to be more effective in the workplace.

DURATION: 5 Days

Who should attend?

This training course is suitable to a wide range of professionals but will especially benefit:

Office Managers, Team Leaders, Administrators, Supervisors, Secretaries, Support Staff and Personal Assistants.

Course Content

Day 1: Taking Control of Your Work Life

- Understanding and Clarifying Purpose, Vision, and Mission

- External and Internal Customer Service
- The Secret to Working Smarter rather than Harder.
- Controlling, Prioritising and Organising Your Work
- Gaining an insight into your Strengths and Weaknesses
- Making Your Office User-friendly and Efficient

Day 2: Essential Administrative Skills

- Mind Mapping Techniques
- Right Brain / Left Brain Theory
- Managing Larger Projects to Meet Deadlines
- Planning and Problem-Solving Skills
- Managing Meetings Effectively
- Working with more than One Manager

Day 3: Vital Communication Skills

- Communication Styles and When to Use Them
- Communicating with Confidence
- Win-Win Conflict Resolution
- Understanding and using Body Language
- Understanding Gender Differences in Communication
- Understanding Different Personality Types and How to Deal with them.

Day 4: Developing as a Professional

- Listening Skills – *seek first to understand then to be understood.*
- Creating a Professional Image
- Leadership Skills
- How to Make Presentations with Confidence and Power
- Painless Methods for Giving Corrective Feedback
- Best Practices for Delivering Positive Feedback

Day 5: Self-Empowerment and Self-Management

- Understanding the Main Causes of Stress
- How to Build Self-confidence and Strengthen the Ability to Respond to Difficult Situations
- The Essential Skills of Emotional Intelligence
- Using Emotional Intelligence at Work
- Becoming a more Proactive, Responsible and Self-aware Person

- Continuing Professional Development - *where to go from here?*

General Notes

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Strategic Talent Management

Dates	Location	Fees (\$)
19 th -23 rd February	Nairobi	1500
08 th -12 th April	Mombasa	1500
24 th -28 th June	Nairobi	1500
23 rd -27 th September	Dubai	3500
25 th -29 th November	Dubai	3500

Introduction

Identifying, developing, and retaining your talent has never been more important for the industry with the ever-changing economic market. An organisation's best and most asset is undoubtedly the people; as it's the people who operate the systems, the equipment and who can really make the difference between growth or failure. Losing or not being able to recruit the best talent can have a disastrous impact on an organization's growth and sustainability. This highly interactive Strategic Talent Management training course will teach you the key talent management processes, systems, and procedures to apply these in the multi-complex industries.

On this training course, you will gain insight into innovative talent identification methods, develop targeted grading structures, review, and develop competency / behavioural frameworks as well as how to grade and assess your talent/high potentials with the effective use of psychometric tools and other assessment methods. In addition, you will define critical development options ensuring the correct development for talent in the organisation. You will also learn how to create sustained growth through active succession planning and strategy to ensure positive career paths and development for talent and high potential employees.

Conference Objectives

- Understand the mechanisms to define talent, as well as manage your talent and high potential.
- Develop key strategies to optimize your talent and high potential employees.
- Engage and employ robust talent strategies within the complex multi-discipline industries.
- Produce develops effective and functional succession planning strategies.
- Lead and manage OCR (Organisational Capability Review) meetings to ensure pro-active succession for sustained growth.

DURATION: 5 Days

Who should attend?

This training course on Strategic Talent Management will greatly benefit individuals, aligned to the identification, development and retention of talent and high potential people in the business, including: Human Resource Managers, HR / L&D / Talent Professionals, Training Managers, and Recruitment Officers and Managers

Course Content

Day 1: Defining and Attracting Talent

- Talent management – Overview and background
- Talent / high potential - Defining the criteria.
- Talent options - Recruit external or grow internal.
- Aligning talent management with organisational development (OD) and business strategy
- Utilising workforce planning and other sources of data
- Attraction strategies – Use of media and other channels

Day 2: Creating Your High Potential Talent Pool

- Talent management models, grading, and structures
- Assessment methods and systems - Use of Psychometric / Behavioural / Competency Frameworks
- Conducting an effective talent gap analysis
- ABC model of potential – Getting the criteria right
- Using the 9 Box Grid, and other methods to create your talent and high potential matrix.

Day 3: Developing Your Talent and High Potentials

- Defining high calibre development options
- Conducting an effective performance discussion
- Creating individual development plans
- Powerful feedback techniques: Motivating individuals to achieve higher potential.
- Coaching for success

Day 4: Retaining and Sustaining Your Talent and High Potentials

- Career paths – Guidance for growth
- Using mentoring programmes to develop and retain your talent.
- Reward strategies - Intrinsic and extrinsic incentives to motivate your talent.
- Managing expectations and delivering workable outcomes
- Growth rotation development (assignments, experience strategies)
- Creating a sustainable talent pipeline

Day 5: Strategic Succession Planning and Organisational Capability Review

- Defining your bench strength
- Succession planning and the OCR process
- Conducting effective calibration meetings
- Formulating a strategic talent plan for the organization in-line with the business strategy
- Communicating the strategy to the board and the company
- Conclusion and review

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Advanced Electronic Document Management Systems (EDMS)

Dates	Location	Fees (\$)
25 th -29 th March	Ghana	3500
27 th -31 st May	Nairobi	2500
12 th -16 th August	Uganda	2500
23 rd -27 th September	Dubai	3500
23 rd -27 th September	Uganda	2500
11 th -15 th November	Nairobi	2500
16 th -20 th December	Dubai	3500
16 th -20 th December	Uganda	2500

Introduction

A document management system is a computer system used to track and store electronic documents. It is usually also capable of keeping track of the different versions modified by different users. The term has some overlap with the concepts of content management systems. It is often viewed as a component of enterprise content management systems and related to digital asset management, document imaging, workflow systems and records management systems. This course shows you how to deal with papers in an electronic way to get rid of the papers hard copy which takes a lot of space and time.

Conference Objectives

- Manage/ control documents, including folders and forms, reduce document distribution costs – no more paper.
- Distribute and view documents costs – no more paper.
- Scan, OC, index, and archive paper documents.
- Automate other office functions that involve workflows and electronic mail.
- Address requirements of ISO 9000 and other regulatory agencies.
- Understand different technologies involved in EDMS.
- Get hands-on training on some EDMS products.
- Evaluate merging standards.

Duration: 5 Days

Who should attend?

This training course is suitable to a wide range of professionals but will especially benefit; Compliance Officers/Managers, Information Security Managers, Archivists, Records Managers, Information Managers, Operations Managers, Knowledge Managers, Administrators, Librarians and Secretaries

Course Content

Day 1: Introduction:

- EDMS – what is it and Benefits.
- The paper floods.
- The paperless office

- Document capture
- Scanning of documents
- OCR and image processing
- Indexing, archiving and retrieval.
- Demonstration
- Word processors/spreadsheets
- Forms
- Document Management

Day 2: Document Control:

- Revisions/versions/histories
- Audit trails
- Reports
- Demonstration
- Forms Management
- Creating forms
- Filling and saving forms/data.
- Document Distribution: Workflow Management
- Applications
- Creations
- Tracking/closure
- Demonstration
- Filling and saving forms/data.

Day 3: Document Distribution: Workflow Management:

- Applications
- Creations
- Tracking/closure
- Document Distribution: Electronic Mail: Concepts and Demonstration
- Document Browsing
- Navigation
- Application/independent viewers
- Annotation/sticky/notes/red/lining
- ISO 9000 & others Regulatory Requirements
- System Architectures & Platforms: LAN's & WANs and Client-Server Architectures

Day 4: Technology Options:

- Encryption
- Authoring Systems
- Card/folio-based systems.
- Types of Documentation Systems
- Implementing EDMS
- Off – the- shelf VS Customs systems
- Allocating resources
- EDMS management

- Updating system
- Future topics
- Documents on demand
- Multimedia documents
- Process Context Diagram- Document Management
- Process flow- Document management
- Role and responsibilities- Document management
- Potential process measurements (KPIs)

Day 5: Creating Backups and Restoring:

- Top Document Management Software Products
- Best- practice in document management procedures, based on ISO standards
Document Creation Templates
- Multiple Security Levels: Case Study

General Notes

1. This course is delivered by our seasoned trainers who have vast experience as expert professionals in the respective fields of practice. The course is taught through a mix of practical activities, theory, group works and case studies.
2. Training manuals and additional reference materials are provided to the participants.
3. Upon successful completion of this course, participants will be issued with a certificate.
4. We can also do this as tailor-made course to meet organization-wide needs.
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Electronic Records and Archives Management (ERAM)

Dates	Location	Fees (\$)
24 th -28 th June	Nairobi	1500
26 th -30 th August	Nairobi	2000
07 th -11 th October	Uganda	2000
16 th -20 th December	Dubai	3500

Introduction

Electronic Records & Archives Management is the process of creating, managing, tracking, and storing electronic records and archives within an organization's workflow. It involves the digitalization of information, standardizing document workflow systems, and records management systems with the aim of eliminating hard copy papers which consumes the organizations space and time.

In modern businesses and organizations, a well-designed and properly implemented electronic document management system supports in eliminating manual processes to gaining quick access to relevant information and documents directly on electronic devices, maintaining the relationship between documents and physical spaces, controlling document user update versions while maintaining the quality and accuracy of the organizations documents.

This course is intended to equip participants with understanding and skills on organizing, distributing, and integrating business/organizations documents to simplify the processes, allowing your team to instant access to different types of documents within and outside the office.

Conference Objectives

- Create a strategic plan for a records improvement process.
- Align the records management program to the corporate goals and objectives.
- Provide input into the Enterprise Content Management initiatives for their company.
- Prepare their company for Information Governance, beyond IT Governance
- Assist their company in balancing the needs for Privacy versus Accessibility of records.

Duration: 5 Days

Who should attend?

This training course is suitable to a wide range of professionals but will especially benefit; Compliance Officers/Managers, Information Security Managers, Archivists, Records Managers, Information Managers, Operations Managers, Knowledge Managers, Administrators, Librarians and Secretaries

Course Content

Day 1: Introduction to Electronic Document Management & Document Lifecycle

- Digitalized information management

- Concept and general principles of EDM
- Purpose and Importance of EDM
- Differences between RMS (Records management system) and EDM
- Challenges of EDMS systems
- Benefits and good practices in using EDM.
- Creation
- Distribution and use
- Disposition
- Archiving

Day 2: Electronic Recordkeeping & Elements of Effective Records Management System

- Electronic recordkeeping vs electronic record management
- Objectives of electronic recordkeeping
- Integration of ERK system with other IT systems
- Critical success factors for implementation of ERK system
- Records inventory
- Retention scheduling
- Records storage & conversion
- Vital Records disposition

Day 3: Classification, Indexing and Metadata Management

- Designing a records classification System
- Types of classification schemes
- Attributes of a good filing system
- Importance of metadata
- Uses and sources.
- Methods for collecting and applying metadata.

Day 4: Evaluation, Planning Implementation & Implementation Standards of an ERM system

- ERM needs assessment.
- Data collection from different users
- Data analysis and use in ERM planning.
- Records Management integration to organization information management strategy
- Planning for cultural change associated with ERM.
- Determining end users' roles in ERM system
- Planning for resources in ERM implementation
- Components of an ERM system
- Solution options for information and records management
- Designing an ERM system
- Steps to implement an effective ERM program.
- Developing information governance strategy
- Integrating people, processes, and technologies
- International documentation integration regulations and requirements
- Electronic record management policy
- EDMS case study reports by Doculabs and ISO on ERM, EDM, and ECM systems
- Control of documents and management

Day 5: Disaster Management, Monitoring, Auditing, Security and Control in ERM

- Types of disasters, hazards, and risks in ERM

- Disaster risk planning
- Development of policy, procedures for disaster risk management
- Records protection method
- Quality management requirements
- Conducting regular reviews of records management policy, plan, system, and guidelines
- Monitoring compliance to records management guidelines.
- Change management in organization records management policy.
- Document security
- Multiple security levels
- Encryption
- Authentication and authoring systems
- Backups and document restoration

General Notes

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Electronic Document Management Systems (EDMS)

Dates	Location	Fees (\$)
25 th -29 th March	Ghana	3500
27 th -31 st May	Nairobi	1500
29 th July-2 nd August	Uganda	1500
09 th -13 th September	Mombasa	2000

Introduction

Information, no matter how it is initially produced or collected, is becoming an increasingly asset for organizations today, while simultaneously the requirements to archive information are becoming more complex. Finding an efficient approach to archiving information across all material aspects of its lifecycle – from its creation to its defined destruction – is a challenge. At the same time, the need to establish such an efficient approach is essential, with benefits in cost-cutting and organizational performance being paramount. This training is design to show participants how to deal with papers in an electronic way to get rid of the papers hard copy which takes a lot of space and time.

Conference Objectives

- Create a strategic plan for a records improvement process.
- Align the records management program to the corporate goals and objectives.
- Provide input into the Enterprise Content Management initiatives for their company.
- Prepare their company for Information Governance, beyond IT Governance
- Assist their company in balancing the needs for Privacy versus Accessibility of records.

Duration: 5 Days

Who should attend?

This training course is suitable to a wide range of professionals but will especially benefit; Compliance Officers/Managers, Information Security Managers, Archivists, Records Managers, Information Managers, Operations Managers, Knowledge Managers, Administrators, Librarians and Secretaries

Course Content

Day 1: Introduction on EDMS:

- What is it and benefits?
- Introduce Engineering EDMS key concepts and drivers.
- The paper floods.
- The paperless Office
- Document Management policies and procedures

Day 2: EDMS Components and Document Capture, Distribution, and Browsing:

- Scanning of documents
- OCR and image processing
- Demonstration
- Indexing, archiving and retrieval.
- Document capture
- Strategic Planning and Management for Records and Archive Services

Day 3: Strategy and Understanding Key Elements:

- Document and records management strategy
- Information governance
- Understanding the terminology
- Managing Information assets
- ISO 15489
- ISO 5489 Part 1 and Part 2 overview

Day 4: Document Management&Distribution:

- Document control
- Revisions/versions/histories
- Audit trails
- Reports
- Demonstration
- Forms Management
- Creating forms
- Filling and saving forms/data.
- Workflow Management
- Applications
- Creations
- Tracking/closure
- Demonstration
- Electronic Mail
- Concepts
- Demonstration

Day 5: : Paper Records Processing System:

- Explain the role of paper desk organization in records management.
- Outline the options in the paper and email route.
- Assess the efficiency of their departments' current information storage and filing system.
- Describe classification, cross-references, and index systems for paper-based storage.

Unit 5: Concepts and Set up Components:

- Classification schemes
- Searching and retrieving
- Controls and security
- Metadata and indexing
- Document and records lifecycle
- Capture, store, and management
- Preserve and archive.
- Presentation and delivery
- legislation, standards, and regulation
- Other Sources of Documents
- Word processors/spreadsheets
- Forms

General Notes

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International Financial Reporting Standards (IFRS)

Dates	Location	Fees (\$)
25 th -29 th March	Ghana	3500
29 th July-02 nd August	Mombasa	2000
09 th -13 th September	Zanzibar	2000
04 th -08 th November	Uganda	2000
09-13 th December	Uganda	2000

Introduction

The International Financial reporting standards course will help build the knowledge you need in IFRS for success in today's global business world. The course will cover most of the international accounting standards and international financial reporting standards. It will help participants gain an understanding of global accounting standards and their practical use in the preparation of financial statements.

Developed with input from subject matter experts from across the region, this course is designed to provide accounting and finance professionals with the knowledge and practical skills needed to use IFRS and stay up to date with the newest standards and changes.

Conference Objectives

- Describe the setting process in IFRS and list the currently available standards.
- Explain the most recent updates on existing IFRS and evaluate the effect of newly issued standards on their organization.
- Understanding the financial statement
- Determine the correct presentation and minimum disclosure for components of statements of financial position, statements of comprehensive income, statements of owners' equity, and statements of cash flows in accordance with IFRS.
- Appraise and properly account for transactions affecting current assets and liabilities, noncurrent assets and liabilities, and revenues and expenses in accordance with IFRS.
- Use professional judgment in applying IFRS for matters relating to non recurrent business transactions.

Duration: 5 Days

Who should attend?

Professionals in the fields of finance and accounting as well as professionals seeking to enhance their international accounting knowledge from companies implementing IFRS as the standard of reporting.

Course Content

Day 1: Introduction to IFRS and presentation of financial statements

- Defining the term 'IFRS'
- IFRS standard setting process
- Financial position presentation format as per IAS1, presentation of financial statements
- Components and classification of current and non-current assets and liabilities
- Offsetting assets and liabilities
- Income statement minimum presentation requirements as per IAS1, presentation of financial statements
- Presentation of revenues and expenses by nature or by function
- Components and classification of stockholders' equity
- Other comprehensive income: nature of its components
- Supplemental disclosures

Day 2: Income Standards

- IAS 18-Revenue
- IAS 11-Construction contracts

Day 3: Asset standards

- *IAS 2-Inventories*
- *IAS 16-Property plant and equipment*
- *IAS 20-Government contracts*
- *IAS 23-Borrowing costs.*
- *IAS 17-Leases*
- *IAS 38-Intangible assets*
- *IAS 40-Investment property*
- *IAS 41-Agriculture*
- *IAS 36-Impairment of assets*
- *IFRS 6- Exploration and evaluation*

Day 4: Liabilities standards

- IAS 21-Effects in change in foreign exchange
- IAS 3 Business combinations
- IAS 11-Joint arrangement
- IAS 12-Disclosures
- IAS 13-Fair value measurement

Day 5: Disclosures standards

- IAS 33-Earning per share.
- IFRS 8-Operating segments
- IFRS 5-Noncurrent assets held for sale & discontinued.

- IAS 10-Events after the reporting period
- IAS 24-Related party disclosure
- IAS 34-Interim reporting
- IFRS-First time adoption of IFRS

General Notes

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