

Operational Process Management Training

Summary and Scope of Training

The scope of this engagement will be focused on training your employees on how to effectively map their current and future state processes, master the technical skills required to maximize the potential technology and automation, as well as exploring potential value-added software applications that will integrate with QBO to create a seamless ecosystem to manage the different components of the business. These processes will entail project management procedures, administrative support procedures, accounting required procedures, technical procedures and relationship management procedures.

The deliverables will include:

- Facilitated classroom based training or one-on-one hands-on training
- Trainees must complete a live case study project for each module before completion
- Current Instructor: Sarah Tiet, QBO Advanced Certified
- Trainee per class: 1 – 10
- Certificate of completion

Training Cost - Training cost is \$3,000 per trainee

Training Schedule and Course Outline

| | | Hours |
|--------------------------------|---|-----------------|
| Day 1 | <ul style="list-style-type: none"> • What does operational efficiency mean and effect? • Business culture and operational efficiency • Measurable benefits of lean operations | 3 |
| Day 2 | <ul style="list-style-type: none"> • Foundation of operational efficiency: System and Processes • Process documentation methodology and tools • Using QuickBooks Online in day-day operations | 3 |
| Day 3 | <ul style="list-style-type: none"> • Project management key metrics and collaboration strength • Training on all modules and the organizational effect and potential • Examples, scenarios and hands-on training • Process documentation updating | 3 |
| Day 4 | <ul style="list-style-type: none"> • QuickBooks Online Projects Module training • Examples, scenarios and hands-on training • Process documentation updating | 3 |
| Day 5 | <ul style="list-style-type: none"> • Integration of QuickBooks Online Projects and Project Management • Change order management and exception handling • Full cycle case study and examples | 3 |
| Day 6 | <ul style="list-style-type: none"> • Advanced security, permissions and audit controls • Project reporting for productivity and capacity • Examples, scenarios and hands-on training | 3 |
| Day 7 | <ul style="list-style-type: none"> • Customer relationship management and pricing levels • Documentation tools to maintain processes and procedures | 3 |
| Total Training Services | | 21 Hours |