



Onsite Software Training



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➔ Training on Microsoft Office:

- Hands On
- Demonstration, and
- One-on-One

For California State Agencies

Submitted By

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About Applied Office

Applied Office is owned by David Diskin, a Microsoft Certified Professional in Windows XP and certified “Master” of Microsoft Office with over 15 years of computing experience in training, application development, and consulting.

Applied Office provides on-site computer training to a number of businesses and agencies including:

- California Dept of Social Services
- Teichert Construction
- University of the Pacific
- Sierra College
- Lodi Memorial Hospital
- The County of San Joaquin

Owner David Diskin is a frequent contributor to the community, helping a number of organizations *pro bono*, including:

- The Lodi Public Library
- Women’s Center of San Joaquin
- World of Wonders Science Museum
- Greater Kiwanis of Lodi

As a result of his philanthropy and volunteerism, David Diskin was recently honored as Volunteer of the Year by the Lodi Chamber of Commerce.

David Diskin is also a part-time instructor for the University of the Pacific School of Engineering, hired to update course curriculum on Microsoft Excel, Access, and Visual Basic Programming.



References

Please feel free to contact any of the following references:

Donna Schultz	Lodi Memorial Hospital	209-339-7609
David Wayne	Wayne, Gaynor, and Umanoff	310-846-5770 x230
Dennis Main	California Dept of Social Services	916-657-1982
Cathi Schuler	University of the Pacific	209-946-3014
Janet Hamilton	City of Lodi	209-333-6800 x2590
George McHugh	County of San Joaquin	209-468-0852

“Community Bank of San Joaquin is excited to have Applied Office work with us to deliver specialized training on our Microsoft Office Applications and the Windows XP System.”

Mike Letizia, Vice President
Community Bank of San Joaquin

“I saw in the paper today that you were honored by the Chamber for your work with Lodi House and the Women’s Center. I am so glad to see they did that, because you have done so much for us. You deserve it. Thanks again.”

Suzanne Mangum, Executive Director
Lodi House

“Thank you so much for all your help. You totally went above and beyond the call of duty; that is for sure!”

Kelly Higgs, Advertising Director
Geweke Automotive Group

“We like the fact that you specialize, and find the training very convenient. We value you immensely!”

Marilyn Storey
Lodi Chamber of Commerce

Training Features and Benefits

Customization

Every Applied Office proposal is entirely customizable. Your instructor will tailor the topics to be covered, the curriculum, the duration of classes, and the materials requested based on your input and requests. This allows clients to learn topics that are of specific interest to them and make the most of their investment.

Three Types of Training

Applied Office provides training in three ways:

Hands-On: If you have access to a lab of workstations, your instructor can provide a demonstration of the skills to be learned while employees follow along on their own PCs.

Lecture: If you do not have a lab, the instructor can demonstrate skills for an audience while they watch and ask questions.

One-on-One: For employees who need individual attention, one-on-one training will help accelerate their learning in a private session, with custom curriculum tailored to their exact needs.

In either case, questions are definitely encouraged.

Location and Equipment

Sessions will be held at your lab, conference room, or office. This gives you full access to your network, user files, and other resources, and is convenient for your employees.

The proposed pricing assumes that you will be coordinating all equipment, including lab or individual workstations, a projector and screen, network access, and instructor station.

Class Scheduling and Length

This proposal is written for a full day (approximately eight hours) of training. The time can be broken into any combination of lab, lecture, or one-on-one training. You may want a full day of hands-on training in a lab, or a mixture of all three. The choice is yours.

Materials

Applied Office will provide a customized set of **Lecture Notes** for each class scheduled. You will be given a PDF file which you may make copies from, email to your participants, or make available via internal website.

Follow-Up Guarantee

For ninety days following any hands-on class, participants can email the instructor any question that pertains to the class(es) they took. They can expect a complete, easy-to-follow answer within one business day!

Proposed Training Classes

As a starting point for discussion, the following **hands-on classes** are recommended for users already familiar with Microsoft Office. The list consists of intermediate skills as well as features new to Office 2007. It is based on an eight-hour session, and includes time for breaks, lunch, and plenty of Q&A.

Office 2007 Overview

- New File Format Compatibility
- The Ribbon
- Shortcut Keys
- Quick Access Toolbar
- The Office Button Menu
- Developer Mode
- Compatibility Mode and Disabled Features
- Zoom Shortcut

Outlook

- The To Do Bar
- Daily Task List
- Quick Flags
- Categories
- Keyboard Shortcuts
- Sharing Calendars and Contacts
- Public Folders
- Rules

Word

- Format Mini-Toolbar
- Styles
- Table of Contents
- Headers and Footers
- Quick Parts (formerly AutoText)
- Building Blocks
- Smart Art
- Mail Merge

Excel

- Formatting as a Table
- Conditional Formatting
- Headers and Footers
- Adding and Customizing Charts
- Pivot Tables

PowerPoint

- Themes
- Photo Styles
- Selection Task Pane
- Packaging for CD / USB
- Enhanced Slide Masters

Full List of Classes Offered

Applied Office offers a variety of classes, on some of which are included in this proposal. The following is a complete list of on-site classes that are offered:

General Computing

- Windows XP / Vista
- Computer Efficiency Tips
- Computer Security

Microsoft Word

- Beginner
- Using Mail Merge
- Creating and Using Styles
- Working with Headers/Footers
- Understanding Tables and Tabs
- Making Forms in Word
- Macros

Microsoft FrontPage / Expression Web

- Beginner
- Learning HTML
- Cascading Style Sheets
- Section 508 Compliance
- Search Engine Optimization

Microsoft Access

- Database and Table Structure
- Building Queries
- Building Advanced Queries
- Creating Forms
- Designing Reports
- Using Visual Basic (VBA)

Microsoft Excel

- Beginner
- Formatting Spreadsheets
- Understanding Formulas
- Multiple Worksheets/Workbooks
- Locking Down Your Workbook
- Creating and Customizing Charts
- Pivot Tables
- Tips and Tricks
- Macros

Microsoft Outlook / Exchange

- Introduction to Outlook
- Managing Your Inbox
- Email Netiquette and Viruses
- Contacts In Depth
- Tasks In Depth
- Appointments In Depth
- Administrative Assistants Only

Microsoft PowerPoint

- Beginner
- Intermediate

Other Classes

- Microsoft Publisher
- Microsoft Project
- Microsoft Visio

Get a complete listing of classes with descriptions at www.AppliedOffice.net.

Customer Reference and Case Study

Client:

California Department of Social Services (CDSS)

Project Objectives:

Applied Office was brought to CDSS by Training Director Carol Smith following a department-wide rollout of an upgraded version of Microsoft Outlook. CDSS wished to improve its employees' knowledge of this program vital to electronic communications within the department. Objectives for this project included:

- Increase the knowledge of attendees on Microsoft Outlook, providing a number of scheduled classes ranging from soft-skills such as email “netiquette” to technical skills including email management, task tracking, and calendar sharing
- Create and provide reference handouts for attendees
- Follow-up support for attendees who have additional questions pertaining to the subject matter

Methodology:

A variety of lecture-based classes were offered to the staff of CDSS between June 2006 and February 2007, empowering employees to register to the classes they felt they needed. A sampling of classes included:

Outlook Basics - This beginning class on Microsoft Outlook covered basic skills and software features including the inbox, calendar, contacts, and tasks.

Attendees were shown how to create a simple email, use the address book, set up appointments, set reminder alerts for important items, set a vacation message, and more.

Effective Emails and Netiquette - This class on composing and responding to email helped attendees create emails that convey their message across with tact and efficiency. Topics included the use of formatting, confidentiality and sensitive issues, and some technical issues including the “proper” way to attach files using network shares.

Outlook Scheduling for Administrative Assistants - This special class was created for administrative assistance to address their needs as they relate to being delegates for someone else’s inbox or calendar. Attendees learned how to access their manager’s email and calendar, create and edit appointments, send emails on their behalf, and more.

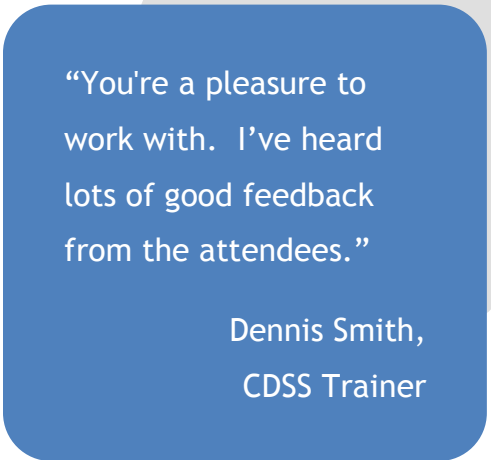
For all classes, attendees received materials created by Applied Office to be used for future reference, and were invited to email or call the instructor if they had further questions.

Results:

Representatives from CDSS, from the training coordinators to actual participants, have consistently praised Applied Office’s services.

Comments referred to Applied Office’s professionalism, flexibility, software knowledge, and helpful materials.

The success of this series of classes has led to additional classes being scheduled for additional Microsoft Office applications including Word, PowerPoint, and Excel.



“You’re a pleasure to work with. I’ve heard lots of good feedback from the attendees.”

Dennis Smith,
CDSS Trainer

Pricing

As described above, Applied Office values the training service as follows:

Full Day (8 Hours) in 209/916 Area	\$ 1000
Full Day (8 Hours) in other Areas	\$1000 + travel expenses
Materials Master Copy	Included

Cancellation

No charges will be assessed if a cancellation/postponement request is received 5 or more business days prior to the scheduled class. If the notice is received fewer than 5 days prior to the scheduled class, there is a 25% scheduling fee.

In Closing...

Again, thank you for allowing me to present this proposal. Please keep in mind that many aspects of this proposal can be tailored to your specific needs.

As soon as you are ready for me to move forward, or if you have any questions, please let me know right away.

Sincerely,

David Diskin, Applied Office

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