

Championing For Administrative Professional Training

**2022 Joan Burge Innovation Award
Submission | Handout**

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1. CHAMPIONING FOR ADMIN. PROFESSIONAL TRAINING

Depending on your organization's current professional development structure, policy on conferences, or education reimbursement policies there are a few ways you can start your efforts in becoming a champion for professional development opportunities within your organization for yourself and/or other administrative professionals in your organization.

Executive Language

When requesting any type of training opportunity, be it a conference, course, or certification, it's important to use the same language executives use when making business decisions. Ultimately spending money on training for any employee is a business decision, and knowing what phrases to use, or avoid, will help improve your chances of obtaining support or approval.

Phrases

- **Key Performance Indicators (KPI's).** These are quantifiable metrics used to evaluate the success of an organization, employee, etc. Know what KPI's should be impacted by the training and use this term when requesting training. *Examples of KPI's: Employee Retention, Operating Margin, Billable Utilization, Profit Margin, Revenue Growth, etc.*
- **Investment Amount.** When talking about the registration fees for the training you're requesting, be sure to use the word investment, and not cost. *The total investment amount for this training is ...*
- **Return on Investment (ROI).** This is used to evaluate if the money spent was profitable for the organization. It is important to know the potential or anticipated ROI when requesting training. This will become easier to do after you've personally seen actual ROIs on training. *In The last training I attended, I learned a timesaving shortcut in Excel. It saved me 5hrs a month, and I shared it with the other 3 admins in the office, and 5 project managers. Averaging out everyone's hourly salary by hours saved in one year, that's roughly a \$19K return on investment. I believe you can anticipate seeing a similar ROI on this training, possibly more due the content that will be covered. (Whenever possible, use dollar value, like the above example. [(5hrs x 12mos) x (9 staff x average of \$35hr) = \$18,900].)*

Overcoming Hurdles

There are a few different hurdles you may have to work on overcoming. A lot of the time when training is denied, it's not personal, it's business. What does that mean? It likely has nothing to do with you, or even your manager directly, but one of the reasons below.

- **No Budget.** Not in the current year's budget.
- **Never Previously Invested.** Meaning, they've never seen the return on investment for administrative training.
- **They Don't Know What They Don't Know.**
 - Most leaders, organizations, and in some cases other administrative professionals don't know **quality** training designed for administrative professionals exists.
 - Most leaders don't fully understand the administrative role, or the extent in which we contribute to and positively impact them or the organization.

In order to overcome these hurdles, you need to know how to speak their language, know the anticipated ROI they can expect to see, and what KPI's will be improved by the training you're requesting.

Training Opportunity Types

One of the most common hurdles in obtaining approval for training in the administrative profession is the lack of awareness around **quality** training opportunities available. You'll need to research quality training opportunities that will add value to you and your organization. It's important to be aware of, and research the many different types of training available to, and specifically designed for your profession.

Additionally, being well versed in the below training opportunities would help you identify an opportunity to self-invest in, if needed, so you have previous experience to reference when speaking to a calculated anticipated ROI.

Free Training Opportunities

If your organization, or manager, doesn't support professional development then this is a great place to start. These free training opportunities will provide you with your first set of tools in being able to become a champion for your professional development.

By participating in the free training that is out there, it will introduce you to the different speakers, trainers, organizations, publications, and training opportunities that are out there. It will also be the baseline in which you'll be able to start to calculate the return on investment that paid training opportunities would provide.

There are many websites that offer free training for various topics. A great place to start are the free training courses/videos around MS Office that will help improve your efficiency in using the program, saving you time. The time saved multiplied by your hourly wage is an ROI you can use when calculating anticipated ROI's on future training.

Webinars

Webinars are often a very affordable place to self-invest in training. They range from \$50-200 on average for a 1 to 2 hour training webinar. They are short snippets of training that can easily be applied to your day-to-day work and improve your performance.

There are also Administrative Training Organizations that offer free webinars. Sign-up with different training organizations, or speakers to be alerted when they're hosting a free webinar.

Conferences

Conferences for Administrative Professionals is a great way to obtain a large amount of training during a relatively short period. It also exposes you to the vast amount of training available by the different speakers at the conference. It also connects you to other like-minded Administrative Professionals you can network with. Their strength might be your weakness. It gives you a contact when needing a recommendation for a venue in their city for your upcoming event, or for a quick answer to problem you're working on. Conferences also help re-energize and revitalize you in your profession. Reigniting your passion for your work.

Designation/Certification Courses

Courses for obtaining a certification, or a designation is another great opportunity. These are in-depth training opportunities. They're more than just obtaining a certification on a piece of paper or a designation after your name. They ensure that you maintain a high level of knowledge and skill in your profession. They show you are committed to mastering your skills and knowledge in your field. As for those pesky KPI's and ROI's your organization is concerned about, they boost your productivity. They also boost your confidence leading you to be a happier employee, and happy employees who feel valued stick around longer.

2. REQUESTING TRAINING

Now that you have the basics, here are the steps I have used successfully, in requesting training for myself and other administrative professionals in my organization. I requested attendance for the *Conference For Administrative Excellence* hosted by Office Dynamics International, for every Office Manager in the Western Region of my organization. Below is an abbreviated version of the steps I took to get approval. You may want or need to start with approval for just yourself. The process is the same, just smaller scale.

The Training Opportunity

Identifying The Opportunity

I researched training opportunities that would add value to myself and my organization. I looked for topics that were timely to my organization's current needs. I then evaluated my options and identified the opportunity I wanted to pursue.

Gathering Data

Once I had my training opportunity identified, in my case a conference, I collected information from the conference's website that I could put into a PowerPoint presentation and use as handouts.

Information Downloaded:

- Conference Pamphlet
- Template Letter for Requesting Training
- Agenda
- Session Details
- Hotel Details
- Dates

Preparing My Request for Multiple Communication Styles

I created a PowerPoint presentation, of only 4 slides. I put only the highest level of information, and most important highlights on my slides. I also prepared the rest of my handouts that had additional details so that I could email them as needed after my presentation. My slides were for leaders who prefer bullet point style communication and the 50K foot view, my handouts covered leaders who preferred having all the details, and my prepared pitch for the presentation covered leaders who liked the personal touch or story.

Gaining Support

Since I was trying to get approval for other admins in my region, I went to my own executive to gain his support in my efforts. I presented to him for myself, and then said I'd like to also present and request participation from the other leaders in our Western Region. He approved my conference registration and supported my initiative to request other office locations to participate. He added me to the agenda of an upcoming leadership meeting to present.

Presenting

I had a 10-minute window to make my pitch to the leaders of my organization to persuade them to invest in the professional development of their Office Managers. I shared the upcoming training opportunity with them, the history and reputation of the organization hosting the conference. I shared why I felt this was the right opportunity

to invest in. I spoke to why attending in-person would be beneficial to the attendee and organization. I shared highlighted sessions that were of interest to my organization current concerns, or interests. I also spoke to what I felt they could expect to see as the anticipated return on investment, including KPI's based on the topics covered, and my own previous personal experience.

Finally, I shared the amount of investment. I was intentional in my dialog, repeatedly referring to it as an investment or investment amount. I was cognizant of using the language leaders use when making business decisions. Investing in training is a business decision.

My Results

My executive level slides, the language I used, and the passion I exhibited while I presented assisted in the great results I achieved. The leaders I presented to went to my executive afterwards to express how they were impressed with my presentation.

My bullet point leaders asked for additional info to be sent directly to their office managers, so they could decide for themselves if they wanted to attend the conference. My detailed leaders reviewed my handouts and forwarded to their office managers. My personal touch & story leaders spoke to me more about my own experience before forwarding the information to their office managers.

Ultimately, every office in our Western Region that had an office manager had an attendee at the conference that year.

3. APPENDIX A: SAMPLE SLIDES

This appendix includes the slides I created for requesting this training opportunity. They include notes that covered the additional talking points I spoke to that aren't present on the slides.

The second year's slides include a ROI slide based on the prior year's attendees and executive's feedback.

2021 Presentation Slides To Regional Leaders



Conference For Administrative Excellence

▪ About the Conference

- Put on by 30-year industry leader in administrative professional training & development
- 20 dynamic sessions and countless opportunities to connect with speakers and experts
- Over 30 hours of learning applicable content, and connection building
- Provide the administrative profession a chance to plan for what comes next

▪ Results to Management

- Ability to shift from a chaotic mindset to a systematic one, resulting in improved motivation and productivity
- New methods and tools for streamlining process, allowing for higher levels of efficiency and a renewed sense of energy and determination
- Ability to leverage technology and become more effective, time saving, and provide stellar support
- The power of embracing essential skills and leadership traits that allow assistants to compete and perform in today's ever-changing workplace

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I took information for Conference Website to create my slides on the conference. This company had more experience in marketing the value of the conference.

I spoke to the history of the Administrative Professional Training organization putting on the conference. The reputation of the organization and their conference within their industry. And the results management should see by sending their Office Managers to the conference.

2021 Conference For Administrative Excellence

▪ Why Attending In-Person is Important

- 2021 marks a time when many are facing unparalleled levels of fatigue and isolation
- Will allow administrative professionals to unite from a variety of industries, business sizes, and cultures
- The opportunities for attendees to learn approaches to modern workplace challenges from other assistants, specialist, and administrators from different industries
- Practice sharing opportunities that provide the knowledge needed to successfully navigate new dynamics and workplace challenges brought on by the pandemic

▪ When & Where

- **Dates:** October 26th thru Oct. 29th
 - Oct. 26th 6:00PM – Welcome
 - Oct. 29th 12:00PM – End to allow return travel
- **Where:** Las Vegas, NV
- **Venue:** Red Rock Resort

I spoke to the importance of team building by attending together, networking with other admins, and the benefit that could provide to our organization. As well as the importance of showing their admin staff they were as important as other members of the team, by offering equal training opportunities.

2021 Conference For Administrative Excellence

▪ Highlights from Agenda

- **The “New Frontier” (of Work)**
 - Learn key elements of success you during change. Adapt to changing landscape of our new work environment. Embrace the behaviors needed to remain resilient, healthy, and positive through continual unknown of a changing work atmosphere. Develop “new” skills as well as up-level existing skills that will be necessary to succeed.
- **Fire Up So You Don’t Burn Out: How To Prevent, Break Through, and Extinguish Burnout**
 - Uncover your individual burnout and pinpoint “hot” areas. Determine how burnout transfers to and hurts other areas of your work and life. Learn on the spot strategies to reduce stress and burnout and improve performance among other strategies.
- **Virtual Team Building Events – Fresh Fun!**
 - See 10 different virtual team bonding experiences that highlight any and every worldwide business with best practices learned thrown in along the way. From Virtual private tastings, meditations, kickboxing lessons with videos turned off of course, high end trivia, and even online comedians that breathe some levity into our day. In fact, be prepared for a sampling during our workshop!
- **Self Leadership – It’s time to Focus on You**
 - Self leadership is about continually developing your mindset and taking action. Learn how to become a self-leader. Motivation and determination. Constructive thought and decision making. Developing a growth mindset. Self-leadership Model: intention, influence, and impact. Self-awareness and self-knowledge. Planning and goal setting. Embracing failure and cultivating grit. Accountability and sitting in the driver’s seat of your life and career.

I spoke to the theme of the conference and how many of the sessions were timely for current challenges many of our offices were currently facing. For each highlighted session on the slide, I spoke about specific current organization needs, concerns, or areas of improvement within our organization these sessions would help address.

2021 Conference For Administrative Excellence

ESTIMATED TOTAL INVESTMENT

Date	Registration	Hotel	Flight	Total
Before 6/30	\$1,395	\$950-\$1700	\$100-\$150	\$2445-\$3,245
After 7/1	\$1,495	\$950-\$1700	\$100-\$150	\$2545-\$3,345

BREAKDOWN OF INVESTMENT AMOUNT

Conference Registration

Registration Dates	In-Person	In-Person & Recording	Live-Stream
Before June 30 th	\$1,595	\$1,695	\$595
After July 1 st	\$1,695	\$1,795	\$695
Group Discount Rates - \$200 Off			
Before June 30 th	\$1,395	---	---
After July 1 st	\$1,495	---	---

Hotel

Number of Nights	Discount	Regular
3-Night Stay	\$950 - \$1,700	\$1,500 - \$2,300

Flights

SMF	SNA	LAX
\$100-\$150	\$100-\$150	\$130 - \$150

Knowing ultimately, they'd want to know what the "cost" of the presented training, I broke it down. However, I was intentional in my dialog, repeatedly referring to it as an investment or investment amount. I was cognizant of using the language leaders use when making business decisions. Investing in training is a business decision.

2022 Presentation Slides To Regional Leaders



2022 Conference For Administrative Excellence

▪ Why Attending In-Person is Important

- Will allow administrative professionals to unite from a variety of industries, business sizes, and cultures.
- The opportunities for attendees to learn approaches to modern workplace challenges from other assistants, specialist, and administrators from different industries.
- Team building within our organization! We may come as individuals from different offices, but we leave as a strong team in our organization. Helping encourage collaboration between offices.

▪ Results to Management

- Ability to shift from a chaotic mindset to a systematic one, resulting in improved motivation and productivity
- New methods and tools for streamlining process, allowing for higher levels of efficiency and a renewed sense of energy and determination
- Ability to leverage technology and become more effective, time saving, and provide stellar support
- The power of embracing essential skills and leadership traits that allow assistants to compete and perform in today's ever-changing workplace

▪ When & Where

- **Dates:** October 18th thru Oct. 21st
 - Oct. 26th 6:00PM – Welcome
 - Oct. 29th 12:00PM – End to allow return travel
- **Where:** Las Vegas, NV
- **Venue:** Red Rock Resort

My presentation to my leaders was similar to the prior year. I removed the first slide from my prior presentation talking about the organization hosting the conference to keep my presentation to 4 slides.

I spoke to the history of the organization hosting the conference, and the importance of attending in person re-highlighting what I'd shared with them the prior year. I also re-emphasized the importance of showing their admin staff they were as important as other members of the team, by offering equal training opportunities.

2021 Return On Investment

▪ What Managers and Attendees from last years conference said

- **Sacramento – Northern CA Director**
 - **The West Sacramento Branch sent their Office Manager**, who has been with the company for 20 years in an administrative/HR role and had recently started transitioning to be the Northern CA Director's Executive Assistant. He stated she's always been a hard worker, and team player. After attending the conference last year, she returned empowered, and passionate about her profession; immediately starting to implement what she had learned. Even more importantly, after 20 years with the company in an admin role she really saw a career path she hadn't previously seen. The empowerment she felt after the conference helped her see the uniquely challenging career path shift and really step into becoming his "right-hand" and Strategic Business Partner, as his Executive Assistant. She has since become even more indispensable than ever before to both himself, and their office.
 - **Key Take Away:** Worth the investment. Is participating again. Sending 2 this year.
- **Las Vegas – Managing Partner & Branch Manager**
 - **The Las Vegas Branch sent 3 Admins**, each one came back feeling re-energized in their profession, and spoke to things they learned at the conference. They are empowered not only to implement the different things they learned as much as they can, but to also find ways to share new best practices with other admins in the office. They remind each other of key things they learned to help reinforce and retain what they learned.
 - **Key take away:** There's immense value in investing in the admins, the doers willing to do everything. The ROI you get when they come back feeling empowered and appreciated has many unseen returns on investment.
 - Participating again this year. 3 Admins already signed up.
- **Las Vegas BD Admin**
 - Personally, attending the Administrative Conference helped me gained new insights both personal and professional to implement the business we do. I am also being more adaptable to other people's ideas and very reliable to help my team to make things easier. I am not being just reactive, responding to the needs as they come in every day. I am now looking for ways to create efficiencies and implement to the benefit of myself, my executive, and my team as a whole.
 - **Key take away:** I have now a clear goal set. I do want to keep growing professionally to later be able to advance in what I love.

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To gain on the positive response from the prior year's presentation I added comments to my slides on the actual ROI seen by leaders who participated the prior year. My slide highlighted those with the highest ROI seen, however, I still spoke to the experience of leaders who had less ROI.

In addition to speaking about the ROI comments stated on the slide, I spoke again to my own experience. I also spoke to the feedback provided by the leaders who saw the benefit in their investment, even though they didn't receive a high return on that investment, and how they would be willing to participate again when they had a different admin.

Such as one leader saying their admin had a chemist degree, and wasn't personally invested in growing as an admin. However, they would participate again, with an admin that wanted to grow in that role.

And another leader saying their admin came back excited. Many times, in discussions about situations at their office would reference they learned X about that at the conference but didn't seem to quite have the ability to apply what she had learned. He was willing to participate again in the future with another admin who had the ability to apply what they learn to their day-to-day tasks.

By sharing the additional feedback, it reinforced the value seen in the training, and willing to participate when they had the right admin in the seat.

2022 Conference For Administrative Excellence

▪ Highlights from Agenda

- **The Evolving Executive & Assistant Partnership: How to Thrive in Today's Business World**
 - Identified the many changes that have occurred since 2020, how they have impacted executives and assistants in their everyday work lives, what new tools have been added to increase productivity and identified pathways on how executives and assistants can work in tandem moving forward.
- **Transform to Perform**
 - Transform more than just your skills, transform how you work!. Topics: Keeping up with evolution of your profession. Feeling in control when things are out of control. Pushing out of your comfort zone. Why and how to do it strategically.
- **Communicating Strategically for Results**
 - Focus will be on strategies and best practices to improve communication awareness. Learning the power of effectiveness and concise communication. Discovering the art of customizing communication to the situation and individual. 5 rules for building communication alignment with your manager.
- **Innovation Mindset**
 - The session is strategically designed to provide knowledge and resources to invite innovative thinking and execution that make both the employee and customer experience extraordinary.

I spoke to this year's conference theme, the many of the sessions that were timely for current challenges we were facing in our various office locations. For each highlighted session on the slide, I spoke about specific current organization needs, concerns, or areas of improvement within our organization these sessions would help address.

2022 Conference For Administrative Excellence

ESTIMATED TOTAL INVESTMENT

Date	Registration	Hotel	Flight	Total
Before 3/31	\$1,395	\$950-\$1700	\$250-\$400	\$2595-\$3,495
After 4/1	\$1,495	\$950-\$1700	\$100-\$150	\$2695-\$3,595

BREAKDOWN OF INVESTMENT AMOUNT

Conference Registration

Registration Dates	In-Person	In-Person & Recording	Live-Stream
Before March 31 st	\$1,595	\$1,695	\$595
After April 1 st	\$1,695	\$1,795	\$695
Group Discount Rates - \$200 Off			
Before June 30 th	\$1,395	---	\$495
After July 1 st	\$1,495	---	\$595

Hotel

Number of Nights	Discount	Regular
3-Night Stay	\$950 - \$1,700	\$1,500 - \$2,300

Flights

SMF	SNA	LAX
\$250-\$400	\$250-\$400	\$150 - \$180

Same as the prior year, I broke it down the cost associated with the conference. Again, I was intentional in my dialog, repeatedly referring to it as an investment or investment amount. I remained cognizant of using the language leaders use when making business decisions.