

# Pollen

s e r i e s

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## The **Pollen Series** is Signify Software's shelf-content.

This series provides foundational knowledge on a range of topics, aimed at Supervisory and Team Leader target audiences. Pollen will be beneficial to Middle Managers as a foundational course.

Each topic in the Pollen Series is divided into PODS or sections. Topics range from 1-5 PODS or sections.

- The Pollen Series can be viewed on PC, tablet or smartphone.
- Content combines interactive activities, multi-media and additional resources to enrich the learning experience.
- The Pollen Series can be customized to your organisation's corporate identity.

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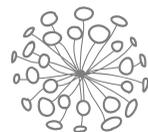
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Pollen  
series

# 1. Personal Mastery

## Active listening

### POD 1 - Creating context

- Understanding the basics of active listening.
- Examining the impact of poor listening on relationships and on your life.

### POD 2 - Assessing your listening

- Examining your listening skills.

### POD 3 - Keys to active listening

- Identifying the keys to active listening and how to use them.

### POD 4 - Using questions

- Using different types of questions to improve your active listening.

## Controlling your anger

### POD 1 - Understanding anger

- Understanding anger as an emotion and its impact on you.
- Examining the reasons why we get angry.
- Understanding why it's important to control our anger.
- Identifying the consequences of not controlling your anger.

### POD 2 - Taking charge of your anger

- Exploring the golden rules when you're feeling extremely angry.
- Learning the 6 steps to control your anger.
- Identifying your hot buttons and creating neutralisers for them.

# 1. Personal Mastery

## Conflict management

### POD 1 – The influence of perception on conflict management

- Reframing our perception of conflict towards neutral ground and more productive conflict management.

### POD 2 – Conflict management styles and situational application

- Understanding the different conflict styles.
- Identifying the pros and cons of each conflict style.
- Examining the appropriateness of a conflict management style in a specific situation.

### POD 3 – Conflict management strategies

- Identifying strategies to effectively manage conflict.

### POD 4 – Personal development in action

- Selecting the appropriate conflict resolution response suitable to a specific scenario.

## Emotional intelligence

### POD 1 – Foundational concepts of EI

- Identifying what emotional intelligence (EI) is.
- Understanding why EI is important.
- Assessing your current emotional intelligence.
- Examining how to grow your emotional intelligence.

### POD 2 – The Competencies of emotional intelligence

- Examining self-awareness and self-management as competencies of EI.

### POD 3 – The Competencies of emotional intelligence

- Examining social awareness and social skills as competencies of EI.

### POD 4 – Practical application

- Discovering interactive emotional self-awareness activities.

# 1. Personal Mastery

## Time management

### **POD 1 – Creating context**

- Understanding the nature of time.
- Analysing how you spend your time.

### **POD 2 – The circle of influence and concern**

- Examining the different spheres of your life.
- Identifying what you can control and what you can't.

### **POD 3 – Creating alignment between your values and how you spend your time and energy**

- Creating priorities for your life.
- Setting goals and developing action plans to achieve your goals.

### **POD 4 – Practical time management tools and techniques**

- Understanding what the 80/20 principle means.
- Identifying the urgency and importance quadrants.
- Examining work tactics to simplify your day at the office.
- Using routines and schedules to simplify your life.

## 2. Life Skills

### Stress management

#### POD 1 – What is stress?

- Understanding the difference and impact of stressors in your life.
- Identifying sources of stress in your life.

#### POD 2 – Towards better balance

- Identifying what causes stress at home.
- Examining strategies for better balance in your life.

#### POD 3 – Managing sources of stress

- Identifying what causes stress at work.

#### POD 4 – Coping strategies for stress

- Developing optimism and coping skills to minimise the negative impact of stress on your life.

### Resilience

#### POD 1 – Creating context

- Identifying what resilience is.
- Examining how you benefit from being resilient.
- Identifying the 5 resiliency assets.
- Examining relationships as the first asset of resilience with reference to
  - The value of good relationships in becoming more resilient.

#### POD 2 – Resiliency assets emotional intelligence

- Examining emotional intelligence as the second asset to develop resilience.

#### POD 3 – Resiliency assets competence

- Examining how problem-solving, decisive action and perseverance supports resilience in your life.

#### POD 4 – Resiliency assets optimism and coping skills

- Discovering how optimism and coping skills help you to become more resilient.

## 2. Life Skills

### Making change easy

#### **POD 1 – Why change is easier for some than others?**

- Understanding different kinds of change.
- Identifying your feelings about change.
- Determining the level of control you have over change.

#### **POD 2 – Reasons for resisting change**

- Identifying the top 5 reasons for resisting change.
- Considering different action steps to address change resistance.
- Reviewing other lessons learned about resistance to change.

#### **POD 3 – Bolstering change leaders**

- Examining Prosci's 5 tips to overcome change resistance.
- Identifying Prosci's top 3 reasons for change resistance.
- Reviewing the ADKAR® change model as a change leader tool.
- Developing resilience in change leaders.

#### **POD 4 – Tips for dealing with change**

- Examining the impact of your thoughts, attitude, actions and routines on your ability to successfully cope with change.
- Using your thoughts, attitudes, actions and routines to help you to make change easy.

## 3. Career Management

### Courageous conversations

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#### **POD 1 – What a courageous conversation is and why they need to happen**

- Identifying the issues that need to be addressed during a courageous conversation.
- Determining what we should communicate during a courageous conversation.
- Identifying screening questions to determine whether a courageous conversation is required.
- Analysing the steps to prepare for a courageous conversation.

#### **POD 2 – The keys to a successful courageous conversation**

- Discovering the top strategies to ensure a successful outcome of your conversation.

#### **POD 3 – Communication skills to make your courageous conversation work**

- Ensuring a more successful courageous conversation in 4 easy steps.
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## 3. Career Management

### Coaching

#### POD 1 – Creating context

- Explaining what coaching is.
- Identifying the rationale for coaching.
- Identifying coaching principles.
- Identifying the different roles in coaching.
- Differentiating between coaching and managing in terms of approach and timing.

#### POD 2 – The GROW coaching process

- Analysing the steps and activities in the GROW coaching process.

#### POD 3 – The LEARN coaching model

- Analysing the principles of the LEARN coaching model.

#### POD 4 – Supporting practical application

- Examining how to build trust to achieve a successful coaching outcome.

### Mentoring

#### POD 1 – Creating context

- Identifying the concept and purpose of mentoring.

#### POD 2 – The Macro mentoring process

- Analysing the phases of the macro mentoring process including:
  - Phase 1: Establishment.
  - Phase 2: Relationship building and implementation.
  - Phase 3: Assessment.
  - Phase 4: Separation.

#### POD 3 – The Micro mentoring process

- Identifying the 6 steps that provide structure to any mentoring conversation.
- Examining the stakeholder roles in the mentoring process, including the mentor, the mentee, and the line manager.

#### POD 4 – Supporting the mentoring process

- Identifying the nature of change and transformation that takes place in a mentoring process.

## 3. Career Management

### Teamwork

#### POD 1 – Creating context

- Distinguishing between a team and a group.
- Defining group dynamics and how these fit into the stages of team development.

#### POD 2 – Self-development tool for team leaders:

- Getting maximum results from your team.
- Using team norms to contribute to collective performance.

#### POD 3 – Supporting teamwork through leadership and management style

- Using the Situational Leadership model.

#### POD 4 – Practical tips and tools for team leaders

- Examining tips for effective feedback.
- Identifying ways to improve your team.
- Examining ways to build your team's character.

### Motivation

#### POD 1 – What is motivation?

- Defining motivation.
- Understanding how motivation creates purpose.
- Identifying the 3 components of motivation.
- Understanding internal and external motivation.

#### POD 2 – Theories of motivation

- Discovering six of the most common theories of motivation.

#### POD 3 – Manager's tips for employee motivation

- Distinguishing between morale and motivation.
- Understanding the impact of good morale in the workplace.
- Uncovering myths about what motivates employees.
- Identifying 8 ways for managers to motivate their employees.

#### POD 4 – Motivating myself

- Identifying what you really want and need.
- Using 10 steps to motivate yourself.
- Discovering 5 tips for self-motivation.

## 3. Career Management

### Self-directed leadership

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#### **POD 1 – What is self-directed leadership?**

- Understanding what self-leadership means.
- Examining the reasons why this has become a critical future skill.

#### **POD 2 – The self-leadership process – Part 1**

- Examining the second part of the self-leadership process.

#### **POD 3 – The self-leadership process – Part 2**

- Exploring boundaries and work ethic in your work environment.

#### **POD 4 – Tips and tools for self-leadership**

- Understanding the rationale for making self-leadership a priority.
  - Exploring tips and tools to help you become a self-directed leader.
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## 4. Transversal Skills

### Problem-solving

#### POD 1 - Creating context

- Identifying how to prioritise problems.
- Examining 7 quick problem-solving steps for busy people.

#### POD 2 - Practical problem-solving strategy #1

- Examining the Root Cause Analysis problem-solving technique.

#### POD 3 - Practical problem-solving strategy #2

- Understanding how to use the 5 Why's problem-solving technique.

#### POD 4 - Practical problem-solving strategy #3

- Using the SWOT Analysis technique in problem-solving.

### Decision-making

#### POD 1 - Creating context

- Understanding what decision-making is.
- Identifying the key focus points during the decision-making process.

#### POD 2 - Using a decision-making technique

- Determining decision-making criteria.
- Determining weighting alternatives for making decisions.

#### POD 3 - Practical decision-making strategy #1

- Analysing the Force Field Analysis technique as decisioning tool.

#### POD 4 - Practical decision-making strategy #2

- Examining the Cause-and-Effect Analysis technique for decision-making.

## 4. Transversal Skills

### Diversity management

#### POD 1 - What is diversity?

- Understanding what diversity really means.
- Examining the things that make people diverse.

#### POD 2 - The organisational benefits of diversity

- Identifying multiple benefits of a diverse workforce for an organisation.

#### POD 3 - Making diversity work

- Examining different organisational focus points where energy and effort should be targeted, to improve diversity management and inclusivity.

### How to apologise

#### POD 1 - How to restore a relationship

- Identifying the choices we make in response to our incorrect or inappropriate behaviour.
- Understanding why apologies are important.
- Identifying the reasons why we don't apologise.
- Discovering 4 simple steps to making a sincere apology.

## 5. Personal Branding

### Being assertive

#### POD 1 – How assertive are you?

- Examining the benefits of being assertive in changing your life for the better.

#### POD 2 – Identify the 3 behavioural styles and their characteristics

- Examining the passive, assertive and aggressive behavioural styles.

#### POD 3 – Habits to help you become more assertive

- Identifying different habits to become more assertive.

#### POD 4 – Additional resources

- Identifying resources that will help you to develop your assertiveness.

### Telling a good story

#### POD 1 – Why a story is such a powerful tool

- Identifying the reasons why storytelling is an effective tool.
- Examining what storytelling can do for your message.

#### POD 2 – The elements of a good story

- Identifying the framework for a good story.
- Examining the elements of a good story.

#### POD 3 – Tips and tools to improve storytelling

- Examining how to immerse your audience in your story.
- Discovering how to create suspense or a sense of wonder.
- Examining how to make people care about your story.

## 5. Personal Branding

### Presentation skills

#### POD 1 – Planning your presentation

- Identifying the purpose of your presentation: Why, What, How.
- Creating context by examining the facts about your topic.
- Planning your pitch by examining the needs and expectations of your target audience.
- Planning your approach by selecting the right dress code.

#### POD 2 – Building your presentation

- Defining your introduction by formulating the background, the baseline and the outline.
- Identifying and using meaningful information using the SLIDE technique.
- Creating a powerful close by summarising, engaging audience participation and closing with a call to action.

#### POD 3 – Rehearsing your presentation

- Familiarising yourself with the content and practicing the presentation.
- Rehearsing your presentation and making notes.
- Integrating different presentation methods into your delivery.
- Improving on your delivery by asking for feedback.

#### POD 4 – Delivering your presentation

- Calming your nerves.
- Opening the presentation with a great introduction.
- Using effective body language throughout your presentation.
- Communicating effectively with your audience.

## 5. Personal Branding

### Dress for success

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#### **POD 1 - Dress codes**

- Identifying dress codes for different levels in a company.
- Identifying what to wear to work to suit your position and office culture.

#### **POD 2 - Dress code rules**

- Examining dress code rules to ensure a professional image.
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## 6. Workplace Conduct

### Meeting etiquette

#### POD 1 – Conduct guidelines for effective meetings

- Analysing global meeting statistics.
- Understanding how not to behave during meetings.
- Identifying the back-to-basics guide for good meetings.
- Examining meeting do's and don'ts.

#### POD 2 – Why meetings don't work

- Identifying the contributing factors to ineffective meetings, including:
  - Information
  - Meeting length
  - Starting late
  - Thinking out loud
  - No accountability
  - Recap

#### POD 3 – Making meetings work

- Examining 6 methods to ensure your meetings are effective and efficient, including:
  - 18 minutes max
  - No chairs
  - No cellphones
  - 10 max attendees
  - DRI
  - 5-Word Summary

### Dealing with bullying

#### POD 1 – Identifying bullying behaviours

- Examining different types of bullying, including:
  - Cyber bullying.
  - Bullying at work.
  - Bullying at school.

#### POD 2 – Identifying workplace bullies

- Identifying the 6 most common types of workplace bullies.

#### POD 3 – Resources for help

- Identifying resources for support for bullying at school.
- Identifying resources for support if you are being cyberbullied.
- Reviewing workplace bullying behaviours.
- Examining your reality.
- Examining 9 suggestions to deal with a workplace bully.

## 6. Workplace Conduct

### Sexual harassment

#### POD 1 – The Code of Good Practice

- Defining what constitutes sexual harassment.
- Identifying what the Code of Good Practice covers in terms of sexual harassment.
- Determining where and how the Code applies.
- Determining workplace policy principles that relate to sexual harassment.

#### POD 2 – The faces of sexual harassment

- Creating context: Reflecting on facts and figures about sexual harassment.
- Identifying different forms and behaviours of sexual harassment.

#### POD 3 – Taking action against sexual harassment

- Determining your first response when facing sexual harassment.
- Identifying practical tips to deal with sexual harassment.
- Determining the formal steps available to victims of sexual harassment.

#### POD 4 – Healing from sexual harassment

- Understanding what trauma is.
- Identifying the signs and symptoms of trauma caused by sexual harassment.
- Determining steps you can take to heal from the trauma of sexual harassment.

## 7. Relationship Building and Networking Skills

### Dealing with difficult people

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#### POD 1 – Creating context

- Identifying what a “difficult person” is.
- Examining different types of difficult people.

#### POD 2 – Dealing with difficult people in general

- Examining 8 steps to effectively deal with difficult people.

#### POD 3 – Dealing with the difficult customer

- Discovering 8 strategies to deal with the difficult customer.
  - Identifying the do’s and don’ts of dealing with the difficult customer.
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### How to talk to anyone

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#### POD 1 – Tips for talking

- Identifying ten tips to communicate in a people-centered way.

#### POD 2 – Being a great conversationalist

- Examining 10 tricks to become a great conversationalist.

#### POD 3 – Generational communication

- Understanding different generations, their background, characteristics, communication preferences and strengths.

#### POD 4 – Office small talk

- Examining the most important do’s and don’ts of office small talk.
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## 7. Relationship Building and Networking Skills

### Effective emails

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#### POD 1 – Things you need to know about your recipient before you write an email

- Planning your email by asking questions about the goal, the message, the recipient and the subject line of your email.

#### POD 2 – Good emails have...

- Discovering top tips for writing a good beginning, middle and end to your email, including:
  - The greeting
  - The introduction
  - The middle or body of the email
  - The wrap up and sign-off of your email.

#### POD 3 – Email rules to live by

- Identifying important rules to help you communicate with impact and write effective emails.

#### POD 4 – When to send your email

- Determining the best time to send your email to get a quick response.
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## 8. Technical Skills

### PC basics

#### POD 1 – Navigation

- Learning how to navigate and find your way around documents and websites using a computer.

#### POD 2 – The Keyboard

- Identifying and using the different functionalities on a standard computer keyboard.

#### POD 3 – The Mouse

- Learning how to use the mouse to increase the efficiency of your work on a computer.

#### POD 4 – The Desktop

- Learning how to find your way around and use the basic functions on the computer desktop, which includes:
  - the taskbar
  - the start icon
  - the control panel
  - checking network connectivity
  - using file explorer
  - internet browsers

## 9. Risk Management

### ABC introduction

- Understanding the difference between corruption and fraud.
- Identifying the dimensions of corruption (corrupt activities).
- Identifying corrupt practices.

### ABC-bribery

- Defining bribery as a transaction.
- Understanding what can be viewed as a bribe.
- Identifying the elements and evidence that constitute bribery.
- Scenario-based learning. Determining the right course of action given the scenario.

### Conflict of interest

- Understanding the importance of ethics by means of global scandals.
- Defining conflict of interest.
- Determining whether a conflict of interest exists.
- Using guidelines for decision making to avoid conflict of interest.

### ABC compliance

- Defining a culture of compliance.
- Identifying the 8 elements of a good compliance programme.

## 9. Risk Management

### AML and CTF: Anti-money laundering and counter terrorist financing

- Defining fraud, money laundering and terrorist financing.
- Examining facts about money laundering and terrorist financing.
- Using examples to explain the 3 steps in the money laundering process.
- Identifying the 5 key steps to contribute to combating money laundering and terrorist financing.

### KYC: Know your customer

- Understanding the basic principles of KYC.
- Examining what KYC tells you about customers and 3rd parties.
- Reviewing KYC programme steps.
- Identifying the 3 elements of KYC good practice.
- Reflecting on the KYC process.
- Using the S-A-F-E method as KYC for transactions.

### AML/CTF suspicious transactions

- Examining the evidence timeline of major corporate fines relating to measures, controls and screening of customers and 3rd parties.
- Questioning transaction criteria to identify potential suspicious transactions.
- Interrogating example scenarios of suspicious customer behaviour/ transactions.
- Using the 4 checkpoints for effective reporting of potentially suspicious transactions.
- Applying the 3 rules to successful reporting and identification of criminals.

# 10. Automotive Series

## Practical selling skills

### POD 1 – Introduction

- Defining who a customer is.
- Understanding what customers expect from a sales executive.
- Analysing how to influence the 6-step customer buying cycle.
- Using the 8-step sales process to close the deal.

### POD 2 – Meet and greet

- Analysing the three deciding factors that customers measure a sales executive on.
- Understanding how to make a great first impression using personal appearance, approach and attitude.

### POD 3 – Qualify the customer

- Identifying three steps to successfully qualify a customer.
- Applying different question types to qualify a customer.
- Identifying focus areas to formulate qualifying questions.

### POD 4 – Present the product

- Demonstrating how to present the vehicle to the customer.
- Demonstrating how to do a static and dynamic vehicle presentation.
- Using the 6-point presentation process during the vehicle demonstration.
- Demonstrating the steps to follow before, during and after a demonstration drive.

### POD 5 – Addressing objections

- Understanding the value of an objection in the sales process.
- Differentiating between an objection and an excuse.
- Identifying the main types of objections.
- Demonstrating two strategies and a 5-step process to address objections.
- Applying techniques to demonstrate value to the customer.
- Identifying the do's and don'ts when handling objections.

### POD 6 – Ask for the deal

- Understanding how to close the deal, ask for the sale and seal the deal.
- Distinguishing between three different types of deal closers and when to use them.
- Applying the 9-step process to seal a deal.

# 11. Compliance

## Risk management

### POD 1 – What is risk?

- Understanding why risk management is important and necessary.
- Identifying what risk is.
- Examining the different risk categories.

### POD 2 – What is risk management?

- Identifying what risk management involves.
- Understanding how to make risk management work.
- Examining the benefits of managing risk.
- Adopting a robust risk culture.

### POD 3 – The risk management process Part 1

- Clarifying risk management goals.
- Identifying key stakeholders involved in risk management.
- Identifying risks in your environment.

### POD 3 – The risk management process Part 2

- Understanding how to take action when a risk is identified.
- Monitoring and reviewing risk management.
- Understanding the communication involved in risk management.

## Labour Relations Act

### POD 1 – Aims of the LRA

- Explaining the purpose of the Act.
- Examining what is included and excluded by the Act.

### POD 2 – Key stakeholders in terms of the LRA

- Identifying the key stakeholders in terms of the LRA.
- Identifying the roles of each stakeholder.

### POD 3 – Unfair labour practices and dismissal

- Identifying four types of unfair labour practices.
- Explaining how disputes about unfair labour practices should be handled.
- Exploring the remedies available in case of unfair labour practice.
- Identifying valid reasons for dismissal.
- Identifying the criteria for fair dismissal procedures.

### POD 4 – Disciplinary and grievance procedures

- Explaining the disciplinary procedure.
- Explaining the grievance procedure.

# 11. Compliance

## Basic Conditions of Employment Act

### POD 1 – Role-player rights

- Identifying the duties of employers and employees in terms of the Act.

### POD 2 – Guidelines for working hours

- Examining the guidelines pertaining to working hours, including ordinary hours, overtime, meal intervals, rest periods, public holidays, night work and Sunday work.

### POD 3 – Guidelines for leave

- Explaining employee leave as it applies to annual leave, sick leave, maternity leave and family responsibility leave.

### POD 4 – Guidelines for remuneration

- Identifying the employer information to be provided to an employee.
- Reviewing guidelines for employee records.
- Identifying information to be included on a pay slip or salary advice.
- Explaining regulations about salary deductions.

## Employment Equity Act

### POD 1 – Overview of the EE Act

- Understanding the purpose of the EE Act.
- Examining the guidelines for implementation of the Act in the workplace.

### POD 2 – Unfair discrimination

- Defining unfair discrimination in the workplace.
- Exploring guidelines and requirements to avoid unfair discrimination.

### POD 3 – Affirmative action

- Defining affirmative action.
- Identifying key concepts associated with affirmative action.
- Reviewing employment policy requirements regarding affirmative action.

### POD 4 – Implementation of affirmative action

- Explaining compliance in the context of affirmative action.
- Defining the Employment Equity Plan, the Employment Equity Report.
- Reviewing the enforcement of employment equity in the workplace.

# 11. Compliance

## Occupational Health and Safety Act

### POD 1 – Overview of the OHS Act

- Understanding the legal intent of the OHS Act.
- Examining what is included and excluded by the Act.

### POD 2 – Duties in terms of the OHS Act

- Identifying the duties of employers and employees in terms of the Act.

### POD 3 – Duties in terms of the OHS Act

- Examining the duties of inspectors, representatives, and committees in terms of the Act.

### POD 4 – OHS workplace procedures

- Reviewing accident and emergency responses.
- Explaining investigation requirements in terms of the Act.

## Workplace ethics

### POD 1 – The core of workplace ethics

- Understanding what workplace ethics are.
- Examining the basis of workplace ethics – our collective values and beliefs.

### POD 2 – Ethical workplace behaviour

- Identifying the questions one can ask to test the ethics of a decision.
- Reviewing how ethics apply to relationships inside and outside the workplace.

### POD 3 – The dark side of workplace ethics

- Testing your understanding of ethical and unethical behavior through practical scenarios.

# 11. Compliance

## Protection of Personal Information Act

### POD 1 – Overview of the PoPI Act

- Identifying what the PoPI Act is.
- Understanding how the Act is applied.
- Reviewing the aims of the Act.
- Identifying 5 key definitions contained in the Act.
- Understanding what ‘integrity of information’ means.

### POD 2 – Classification of ‘Personal information’ under the Act

- Identifying examples of personal information.
- Understanding personal rights under the Act.
- Examining how personal information should be handled to manage risk.

### POD 3 – Implementation of the Act

Examining how the PoPI Act is implemented pertaining to:

- The duties of the Information Regulator.
- Your rights in terms of direct marketing.
- How to lodge a complaint.
- The penalties applicable for non-compliance to the PoPI Act.

## Public Finance Management Act

### POD 1 – Overview of the PFMA Act

- Examining the background information to the Act.
- Understanding the purpose and objectives of the Act.
- Reviewing the PMFA in relation to the South African Constitution.

### POD 2 – The chapters of the PFMA

- Creating awareness of the scope of the PFMA.

### POD 3 – Policies contained in the Act

Examining the policies contained in the Act pertaining to:

- Departments and Public Entities.
- National Treasury.
- Provincial Treasuries.
- Loans, guarantees, and other commitments.
- Accounting officers and financial statements.
- Offences.

# 11. Compliance

## Workplace professionalism

### POD 1 – Overview of workplace professionalism

- Understanding what workplace professionalism means.
- Examining professional behaviours in a work context.

### POD 2 – Professional relationships

- Examining professional relationships, inside and outside of the workplace.

### POD 3 – Professional work ethic

- Exploring boundaries and work ethic in your work environment.

## Treating customers fairly (TCF)

### POD 1 – Introduction to TCF

- Identifying what TCF means.
- Examining why TCF exists.
- Understanding why TCF is important right now.

### POD 2 – TCF in practice

- Understanding the fairness outcomes underlying TCF.
- Identifying how the 6 fairness outcomes can be achieved in daily business practices.

### POD 3 – What will TCF do for the customer?

- Understanding what the different levels of customer protection are and how they work.
- Distinguishing between 'suitability' and 'best interest' when meeting the needs of the customer.

### POD 4 – Making TCF part of our business DNA

- Understanding how to embed TCF in the day-to-day activities of your business.

# 11. Compliance

## FAIS awareness

### POD 1 – Introduction to FAIS

- Identifying the rationale for FAIS legislation.
- Understanding the purpose of FAIS.
- Examining the problems of different legislation that applies to different industry sectors.
- Identifying how FAIS addresses these problems.

### POD 2 – Terminology used in legislation

- Explaining different terms and concepts used in legislation in the correct context.

### POD 3 – Consumer protection

- Identifying the ways in which legislation protects consumers.
- Identifying the measures that protect consumers.
- Identifying the role-players involved in consumer protection.

### POD 4 – FAIS licensing processes and requirements

- Identifying the steps in the authorization process for a company to conduct advisory and intermediary service activities.
- Understanding Fit-and-Proper requirements.

### POD 3 – Requirements for licensing by the Financial Services Conduct Authority for different roles

- Identifying the requirements for three different career paths, namely:
  - Key Individuals
  - The Compliance Officer
  - The Representative.

# 11. Compliance

## FICA

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### **POD 1 – Anti-money laundering and counter terrorist financing (AML and CTF)**

- Defining fraud, money laundering and terrorist financing.
- Examining facts about money laundering and terrorist financing.
- Using examples to explain the 3 steps in the money laundering process.
- Identifying the 5 key steps to contribute to combating money laundering and terrorist financing.

### **POD 2 – AML/CTF suspicious transactions**

- Examining the evidence timeline of major corporate fines relating to measures, controls and screening of customers and 3rd parties.
- Questioning transaction criteria to identify potential suspicious transactions.
- Interrogating example scenarios of suspicious customer behaviour/transactions.
- Using the 4 checkpoints for effective reporting of potentially suspicious transactions.
- Applying the 3 rules to successful reporting and identification of criminals.

### **POD 3 – Know your customer (KYC)**

- Understanding the basic principles of KYC.
  - Examining what KYC tells you about customers and 3rd parties.
  - Reviewing KYC programme steps.
  - Identifying the 3 elements of KYC good practice.
  - Reflecting on the KYC process.
  - Using the S-A-F-E method as KYC for transactions.
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## 12. Wellness

### HIV-AIDS

#### POD 1 – Overview of HIV-AIDS

- Identifying what HIV-AIDS means.
- Understanding how HIV-AIDS is contracted.
- Identifying the different stages of HIV-AIDS.
- Understanding how HIV testing works.

#### POD 2 – Prevention of HIV-AIDS

- Listing the different ways to prevent HIV-AIDS in 4 areas, including:
  - Sexual contact.
  - Mother-to-child.
  - Injecting equipment.
  - Blood transfusing, and organ or tissue transplant.

#### POD 3 – Living with HIV-AIDS

- Identifying ways to stay healthy and productive when living with HIV, including:
  - Taking medication.
  - Exercising regularly.
  - Dieting in a balanced way.
  - Consulting with a health professional.
  - Building a support system with the help of family and friends.

#### POD 4 – Overview of sexually transmitted diseases (STDs)

- Defining what an STD is.
- Identifying the different types of STDs.
- Identifying different ways to practice safe sex to minimise the risk of becoming infected.

## 12. Wellness

### TRAUMA and PTSD

#### POD 1 – Overview of trauma and post-traumatic stress

- Defining trauma and post-traumatic stress.
- Identifying the sources of trauma and post-traumatic stress.
- Examining the impact of trauma and post-traumatic stress.

#### POD 2 – Development stages of trauma and post-traumatic stress

- Identifying the stages of trauma and post-traumatic stress.
- Explaining the signs and symptoms of trauma and post-traumatic stress.

#### POD 3 – The healing process

- Examining the role of 'locus of control' in dealing with trauma and post-traumatic stress.
- Exploring tips and tools to recover from trauma and post-traumatic stress.

#### POD 4 – Helping others in trauma

- Using a 3-step approach to help people at the point of trauma.
- Identifying ways to support others to heal from trauma.

# 12. Wellness

## Financial wellness

### POD 1 – Fundamentals of financial wellness

- Defining financial wellness versus a crisis.
- Describing financial freedom.
- Assessing your current financial status.

### POD 2 – The psychology of money

- Identifying the four elements of money psychology.
- Assessing your money psychology.
- Examining ways to develop a productive relationship with money.

### POD 3 – Money habits

- Defining productive and unproductive money habits.
- Evaluating how you manage your personal finances.
- Identifying ways to improve how you manage your personal finances.

### POD 4 – Ways to manage your money well

- Examining 5 steps to effectively manage your money, including:
  - Budgeting
  - Spending
  - Borrowing
  - Saving
  - Planning

# 13. Performance

## Attitude

### POD 1 – What is attitude?

- Identifying the 3 components of attitude.
- Examining the impact of attitude using positive and negative examples.

### POD 2 – Determine your attitude status

- Identifying your personal attitude status.
- Identifying focus areas for improvement.
- Linking attitude to your life success.

### POD 3 – The impact of attitude

- Discovering how attitude impacts on team dynamics and success.
- Examining tips and tools to cultivate a positive team attitude.

### POD 4 – Baking lessons

- Analysing the components of a winning workplace attitude.
- Discovering 5 easy steps to change your attitude.

# 13. Performance

## Awareness

### POD 1 – Understanding awareness

- Defining what awareness means.
- Differentiating between awareness, attention and mindfulness.

### POD 2 – Identifying different types of awareness

- Distinguishing between self-awareness, social awareness, awareness of time and awareness of tasks and results.

### POD 3 – The importance of awareness

- Understanding how important awareness is in your life, and in your relationships.
- Identifying the impact of awareness on our productivity.
- Identifying the value of environmental awareness in your life.
- Recognising the benefits of awareness.

### POD 4 – Developing awareness

- Recognising your current level of awareness through self-assessment.
- Discovering ways to continuously develop your level of awareness using 6 steps.

# 13. Performance

## Enthusiasm

### POD 1 – What does enthusiasm mean?

- Understand what it means to have enthusiasm.

### POD 2 – Why is enthusiasm a choice?

- Discover why enthusiasm is a choice and not a feeling.

### POD 3 – How does enthusiasm impact my work life balance?

- Identifying the impact of enthusiasm on your personal life, your team and your organisation.

### POD 4 – How to develop an enthusiastic mindset

- Identifying the myths and facts about enthusiasm.
- Discovering six ways to build enthusiasm.
- Applying strategies to develop an enthusiastic mindset.

# 13. Performance

## Self-discipline

### POD 1 – What is self-discipline?

- Understanding what self-discipline means.
- Examining the 5 benefits of self-discipline.

### POD 2 – Why is self-discipline such a great characteristic?

- Identifying the characteristics of self-discipline.
- Determining if you have the characteristics of self-discipline.

### POD 3 – The impact of self-discipline on my life and on my team

- Exploring the boundaries of self-discipline in your life and work environment.

### POD 4 – Cultivating self-discipline

- Exploring tips and tools to help you develop self-discipline.
- Applying the principles of self-discipline to help in reaching your goals.

# 13. Performance

## Impact

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### **POD 1 – What does impact mean?**

- Understanding the value and importance of making an impact.
- Identifying the impact that you have on the people in your life.

### **POD 2 – Strategies for a powerful impact**

- Examining how to make a powerful, positive impact on the people around you or situations in your life.
- Discovering practical strategies to apply to create a more powerful, positive impact.

### **POD 3 – Impact through productivity**

- Understanding what productivity really means.
  - Examining the impact of productivity or lack thereof on your team.
  - Discovering practical tips to make a great impact on your team through your productivity.
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# 14. Human Resources

## Arbitration proceedings: The Employee's Guide

### POD 1 – Disputes in the Workplace

Identify the difference between conflict and a dispute.

Identify the causes of workplace disputes; who is at fault?

- What is conflict in the workplace?
- What is a dispute in the workplace?
- How are they different?
- What are the reasons for workplace disputes?
  - When is it the employee's fault?
  - When is it the employer's fault?

### POD 3 – Understand what Arbitration is

Define arbitration.

- Differentiate between arbitration and litigation.
- Identify when to use which process.
- How should you agree to arbitration?

### POD 2 – How to resolve disputes?

What is Alternative Dispute Resolution (ADR)? Explain how disputes are resolved through ADR. Explain how the ADR forums resolve disputes.

- Define the process of alternative dispute resolution.
- Private dispute resolution vs. Statutory dispute resolution:
  - What is private dispute resolution?
  - What is statutory dispute resolution?
- What is Arbitration?
- What is Mediation?
- What is Conciliation?

### POD 4 – Who takes part?

Identify the role-players in the arbitration process.

Who are the role-players in arbitration?

- The Arbitrator.
- The Employer.
- The Employee/s.

What are their roles and responsibilities during arbitration?

# 14. Human Resources

## Arbitration proceedings: The Employee's Guide

### POD 5 – How does it work?

Explain and prepare for the arbitration process in more detail.

What happens before arbitration?

- Preparation.
- Representation.
- Pre-arbitration meeting.

What happens during arbitration?

- Introduction.
- Preliminary issues.
- Narrowing issues.
- Hearing the evidence.
- Closing arguments.

What happens after arbitration?

- The arbitration award.

### POD 7 – Arbitration tips.

Preparing for arbitration.

Tips to use during the arbitration.

- The opening statement.
- Presenting your evidence.
- Cross-examination.
- The closing statement.

### POD 6 – What is the CCMA?

Understanding the CCMA.

- What is the CCMA?
- What does the CCMA do?
- How can the CCMA help you resolve workplace disputes?

### POD 8 – Now it's your turn!

Applying your knowledge to prepare for arbitration.

Scenario-based questions to apply knowledge.