

CBIZ

Enterprise-Wide Training



®

Accounting | Insurance | Advisory



CBIZ Enterprise-Wide Training

Table of Contents

2-3 HR

4-5 Financial Services

6 Benefits & Insurance

6-7 CBIZ Women's Advantage

7 Additional Training Programs

HR: Training & Professional Development Programs

CBIZ Leadership Council (CLC)

The CBIZ Leadership Council was established as a means to recognize and develop high-performing individuals who have demonstrated success in their current roles and have the potential to assume even greater leadership responsibility in the future. Its purpose is to:

- Better inform current and future CBIZ leaders of the opportunities and certain challenges facing our company.
- Create a forum in which strategic thinking and ideas for growth and success can be generated and discussed.
- Provide a mechanism to solicit and consider varying views on major corporate issues and initiatives.
- Provide an opportunity for current leaders to expand their network across other business lines.

Members of the CLC are expected to participate in seven strategy meetings, each lasting approximately one and a half days. They are nominated to the class by either their divisional practice leader or a corporate sponsor. Final selection to the class is made by our CEO.

Enrichment Series

The Enrichment Series is a collection of programs designed to support and enhance the personal and professional growth of our associates. The areas of focus are supervisory skills, diversity awareness and leadership competencies, as well as customer service and personal work skills. The following courses are CBIZ-developed and led by CBIZ HR Business Partners:

Supervisory Skills

- Behavioral Interviewing Skills
- Effective Performance Management Systems
- Effectively and Fairly Conducting the Disciplinary Process
- Emotional Intelligence
- HR 101: Guidelines for Managing Associates Fairly
- Managing Generational Differences

Diversity

The goal for diversity awareness training, a three-hour interactive classroom session entitled "Succeeding in a



Diverse Environment,” is to sensitize our associates to the opportunities and issues inherent in our ever-changing workforce and marketplace. This is part of an ongoing process intended to develop a more effective organization through stronger working relationships – both inside and outside the organization.

Leadership

CBIZ HR Business Partners are also certified instructors with AchieveForum, a leader in helping organizations translate business strategies into business results by developing the skills and performance of their people. Certification qualifies them to deliver any of the leadership programs available within our Enrichment Series package. A sampling of the courses:

- Principles and Qualities of Genuine Leadership
- Providing Constructive Feedback
- Developing Others
- Hallmarks of Supervisory Success
- Resolving Conflicts within Your Team

Customer Service

There are also Miller Heiman Group courses developed to build critical service skills to aid our associates in the attainment and retention of loyalty among our clients. A sampling of the courses:

- Reaching for Stellar Service
- Caring for Customers
- Teaming Up for Seamless Service
- Healing Customer Relationships

There are also related modules for those who supervise customer service professionals.



Work Skills

There are numerous AchieveForum and CBIZ-developed courses designed to assist associates of any level to build skills and strategies in order to be productive and successful. A sampling of the courses:

- Succeeding amidst Generational Differences
- Professional Development: Unlocking the Doors of Success
- Listening in a Hectic World
- Resolving Conflicts with Your Peers
- Speaking to Influence Others
- Personal Strategies for Navigating Change
- Managing Life Outside Work: Handling Emergencies and Resisting Temptations
- What It Takes to Succeed: The Basic Principles

Presentation Skills Workshops

In this day-long workshop, participants learn how to effectively and quickly develop well-organized presentations. They learn how to create and maintain a positive impression throughout the presentation and deliver presentations with impact, including general guidelines, handling nerves, answering questions effectively and designing visuals. The small class size allows each person to deliver two presentations with constructive critiquing, videotaping and playback review by the external CBIZ consultant.

MyLearn

MyLearn is our learning management system. This platform allows us to offer and track training across the enterprise, as well as develop career paths for our associates. It is a one-stop shop for self-study courses, webinars, tutorials and training resources and includes a calendar with registration capabilities for upcoming instructor-led sessions. MyLearn also includes a direct link to MyCPE, our system which houses Continuing Professional Education (CPE) credits for our Financial Services associates.

California Anti-Harassment Training

The state of California requires two hours of interactive training every two years for all supervisory associates. Through an online format provided by Emtrain, each California CBIZ supervisor completes “Preventing Workplace Harassment.”

Financial Services: Learning & Professional Development Programs*

Core National Level Technical Learning

These group-live, instructor-led programs provide technical training in audit and accounting (A&A) and/or taxation for external client-facing employees below the manager level. Levels 1 - 3 are four- to five-day technical training programs intended for Associates with two years or less of experience. The Senior Associate Conference is a three-day conference with a mix of general sessions, electives and sessions based on experience level.

- Level 1: For Associates with zero to three months of A&A and/or tax experience who have not yet been through a busy season.
- Level 2: For Associates with approximately one year of A&A and/or tax experience and who are still primarily working under the supervision of others.
- Level 3: For Associates with approximately two years of A&A experience (who are managing or preparing to manage their own engagements with minimal supervision and are supervising or preparing to supervise others) and/or tax experience (who are preparing more complicated returns, reviewing basic returns, interfacing with clients and beginning to research and assist with tax planning engagements).
- Senior Associate Conference: For Senior Associates with approximately three or more years of A&A experience (who have been managing their own engagements and/or have been supervising others) or tax experience (who have been preparing complicated returns, reviewing basic-intermediate returns and have completed more complex research and planning projects). A&A Senior Associates generally attend the Senior Associate Conference until promoted to Manager. Tax Senior Associates attend the entire conference for three years and then may attend the electives and general session in subsequent years until promoted to Manager.

MHM Technical Symposium

This three-day A&A technical conference is primarily designed for attest practice Managers and Senior Managers, although attest Shareholders may also attend. The symposium includes a combination of general session

topics and electives based on industry and/or specialized accounting or auditing issues.

Technical Webinars & Self-Study Libraries

Financial Services provides over 50 technical webinars, covering accounting, auditing, tax and industry-focused topics. In addition, employees have access to various self-study libraries offering hundreds of courses to further develop one's technical skills.

Tax Advisor Development Program

This two-year program is intended to transform tax compliance professionals into trusted business advisors by improving their skills in the areas of business acumen, client relationships, business development and technical confidence.

Associate Professional Development & Senior Professional Development Programs

These programs are business unit-delivered professional development programs designed to supplement Core National Level Technical Training by providing a platform for Associates' and Senior Associates' growth as professionals and leaders.

Manager Professional Development

New Manager Orientation

This two and a half-day session is designed for all newly hired and newly promoted Managers. The curriculum focuses exclusively on professional development and covers such topics as Making the Transition to Manager, Delegation, Increasing Communication Success with DISC, Proactive Client Service and Giving Feedback. The session is highly interactive and uses group projects and presentations to facilitate learning.

Advanced Manager Development

This one and a half-day session is intended to help Managers further build the managerial, interpersonal, business development and leadership skills necessary to succeed in that role. Each program focuses on one core skill and is available to any Managers who need to develop that skill.

Tomorrow's Rainmakers

This 18-month program targeted to Managers and Senior Managers is delivered within each business unit. The course uses a relationship-based approach to strengthening ties with existing clients and attracting new clients.



Emerging Managing Director Academy (EMDA)

This five-session program is intended for Senior Managers and Directors who have shown the potential to become Managing Directors (MDs). The program is designed to ensure the candidates have clear awareness of the skills, knowledge and expertise required to make a successful transition and achieve both personal and professional success as a MD. Over the course of the program, the candidates will focus on the MD competencies, including self-development, leadership development, business development, organizational awareness and business skills. EMDA candidates are nominated by their Senior Managing Director and approved by CBIZ MHM leadership.

CBIZ MHM Biennial Conference

This is a three-day event designed for Tax, Attest and Forensic Financial Services Managing Directors/ Shareholders. At this conference, leadership makes presentations on the “state of the union” and shares visions of our business strategy. The curriculum also includes a variety of high-level technical topics blended with sharing of internal best practices, provided in both a general session and breakout-session format. Participants also gain the opportunity to hear from and network with leaders of other CBIZ business segments, which ultimately assists in better serving our clients.

Internship Program

In many locations we offer Spring and Summer internships for students considering a career in public accounting. They receive the same experience as our full-time associates. During their internship they gain experience in tax and A&A work. We also work with them on socialization and goal setting and pair them up with buddies and mentors to help set them up for success. Our goal is to extend employment offers to our interns and have them move up through the company as their careers progress.

CPA Designation Support

CBIZ encourages associates to attain their CPA designation and provides support for those who opt to do so. CBIZ has a direct-pay arrangement with our vendor for a review course and compensates the associate in accordance with his/ her regular base wage while taking the CPA exam (up to 32 hours) if the exam is taken during the normal workweek. CBIZ reimburses the associate for up to four application fees, the exam fees for up to eight sections, required fingerprinting fees, mileage associated with the commute if outside the

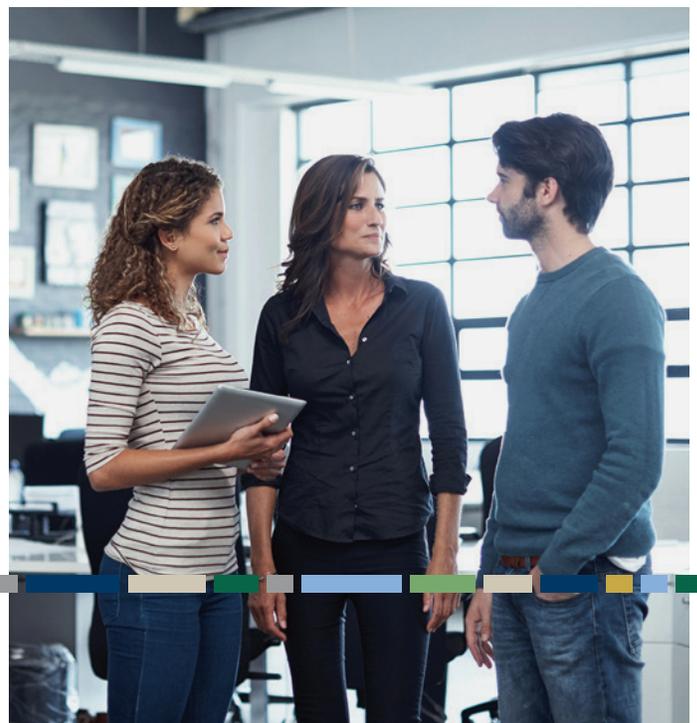
metro area, lodging and meals if an overnight stay is required, and one instance of the AICPA Professional Ethics self-study course or state equivalent (as applicable). CBIZ awards a CPA exam bonus between \$2,000 and \$4,000.

Valuation Designations Support

CBIZ also encourages our Valuation practice employees to pursue the following designations, as applicable:

- Real Estate Valuation Appraisal Trainee
- State Certified General Appraiser
- Member of the Appraisal Institute (MAI)
- American Society of Appraisers (ASA)
- Business Valuation Appraisers
- Business Valuation Professional AM or ASA Accreditation
- Machinery and Technical Specialties (MTS) AM or ASA Accreditation
- American Society of Appraisers (ASA)
- Certified Entity and Intangible Valuations (CEIV) Credential
- CFA Institute Chartered Financial Analyst (CFA)

CBIZ reimburses expenses without regard to scores received for up to two exam application and testing fees, mileage associated with the commute to and from a testing site location outside of metro areas, lodging and meals if an overnight stay is required, and if the class is not offered in the local area of the employee an alternative location will be reviewed. In addition, a bonus is awarded to each eligible employee who successfully completes these designations as a regular full-time or part-time employee: Certified General Appraiser Designation \$2,500, MAI Designation \$5,000, ASA designation \$4,000, CEIV designation \$2,500 and CFA designation \$5,000.



Benefits & Insurance: Learning & Professional Development Programs

CBIZ HCM

Through the CBIZ HCM Training Program each associate is assigned to a training curriculum based on their position. Each curriculum contains specific training requirements necessary to become an expert in their role. The extensive training library consists of courses ranging from department/job specific to customer service and soft skills. The training classes include instructor-led, on-the-job, seminars and computer-based training. In addition, in-house training sessions or mentoring is offered to assist individuals in preparing for their CPP or FPC certification exams. Additionally, the American Payroll Association has approved 32 CBIZ Payroll courses for recertification credits. Each year, Approved Provider status is designated by the American Payroll Association through an application process. CBIZ continually meets the criteria to become an Approved Provider, allowing us to issue recertification credit hours to associates or clients.

CBIZ Benefits & Insurance Services Sales & Training Conference

This conference is a biennial two-day event, featuring updates and professional development in the area of business development. In addition, Employee Benefits, Human Capital Management, Talent and Compensation Solutions, Retirement Plan Services and Property & Casualty each periodically hold sales/training conferences.

CBIZ Benefits & Insurance Services Leadership Development

Foundations of Management has been offered across the country to help leaders who have individuals reporting to them address the key opportunities and challenges that occur when taking a management role. This very intense two-day course covers manager vs. leader, types of power, the entire performance management cycle, including performance planning, interviewing and coaching, and is required for anyone who holds a management or supervisory position.

CBIZ Women’s Advantage

CBIZ Women’s Advantage (CWA) celebrates the uniqueness of the woman business professional. Internally, we direct the development of our women professionals through focused leadership, mentoring and networking, as well as personal and professional development. Following is an overview of the development programs.

Networking Circles I (NCI)

The focus of NCI is personal development and a desire to create opportunities for networking and skill building among all CBIZ women. NCI is a year-long program, involving a series of facilitated small group meetings. This program includes:

- Networking Skills
- Developing and Strengthening Influence Skills
- Effective Communication Skills: Listening
- Effective Communication Skills: Presentation Techniques
- Managing Success in Your Professional and Personal Life – Planning, Prioritizing, Work Practices, Boundaries, Delegation
- Managing Success in Your Professional and Personal Life – Work/Life Roles and Integration, Time Management, Goals
- Advocacy: Marketing Yourself and CBIZ



Networking Circles II (NCII)

The focus of NCII is the professional development of CBIZ women who are emerging business developers and client-facing professionals. The program is designed to develop or further enhance client service and business development skills, leading to revenue growth of CBIZ. NCII is a year-long program, involving a series of facilitated small group meetings. This program includes:

- The CBIZ Trusted Advisor
- Salespeople and Sales Styles: Born or Made?
- DISC: Understanding Your DISC Reports – Your Natural Behavior Tendencies
- DISC: Adapting Your Selling Style to Fit Your Customer's Buying Style
- The Trust Equation
- From Difficult Conversations to Learning Conversations
- Resolving Objections
- Resiliency
- Your Path to Success

CWA Book Clubs

CWA believes that reading good books can challenge and inspire us, yet the experience is not complete until you've shared your thoughts with someone else who has read the book! CWA-sponsored book clubs are open to any CBIZ associate, and participants commit for one year. The clubs choose the books with content focused on professional development topics. CWA purchases the books and the leader is selected from among the participants.

Additional Training Programs

New Horizons Computer Learning Programs

CBIZ partners with New Horizons Computer Learning Centers to provide a national discount to all associates for end-user application, business skills and technical classroom training at any one of New Horizons' 300 centers. CBIZ associates may choose from a wide selection of technical classes and certification packages. New Horizons utilizes the traditional classroom-delivery method – instructor, lecture and demonstration – followed by student practice through hands-on exercises. Students also receive a learning guide and electronic version of the user manual.

CBIZ Channel

The CBIZ Channel, located on CBIZ Central, provides access to a wide array of resources in video format, including training on CBIZ's software tools, internal and external webinar recordings, and messages from our CEO. A few of the most popular sessions include:

- Biz Tips
- CBIZ Mobile
- Concur
- HCM
- Salesforce.com
- TRACS

Social Media

Access CBIZ Central > Corporate > Marketing > Social Media in order to learn about access to various CBIZ social media, guidelines for sharing thought leadership pieces and tips for safe social networking. In addition, there are numerous educational programs, such as:

- Digital Marketing Orientation Video
- How to Use Social Media for Business Development
- How to Use PeopleLinx
- How to Participate in the CBIZ Twitter Program
- LinkedIn: How to Utilize Proven LinkedIn Techniques
- LinkedIn: 10 Steps to an Effective LinkedIn Profile





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**Audit and accounting technical training is provided by MHM (Mayer Hoffman McCann P.C.), an independent CPA firm that provides audit, review and attest services, and works closely with CBIZ, a business consulting, tax and financial services provider. CBIZ and MHM are members of Kreston International Limited, a global network of independent accounting firms.*