

CBIZ

Enterprise-Wide Training



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Accounting | Insurance | Advisory



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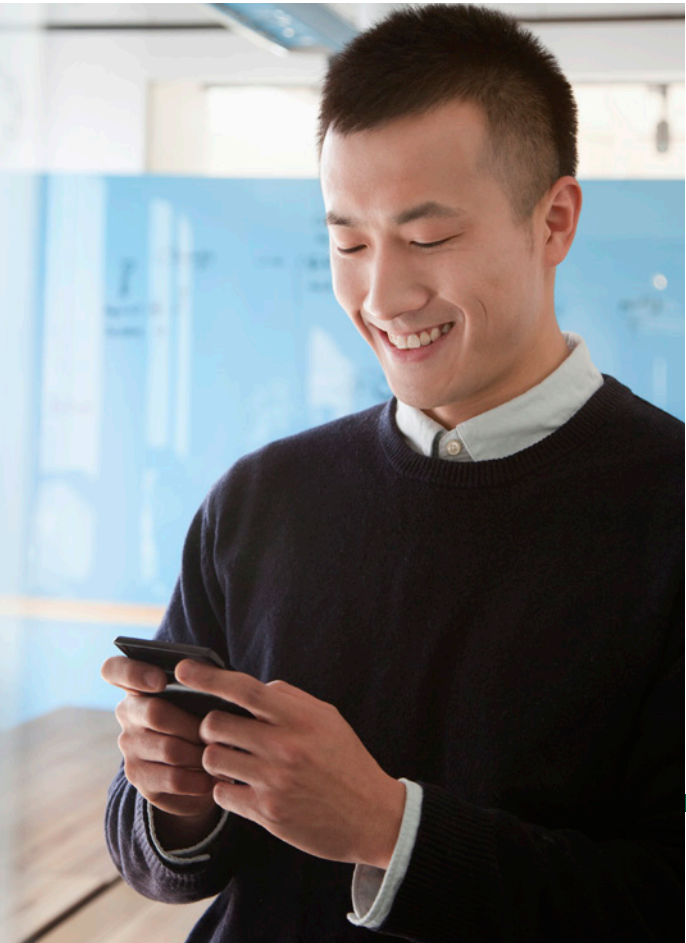
HR: Learning & Professional Development Programs

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.



Diversity & Inclusion (D&I)

D&I education is required for all CBIZ team members on an ongoing basis. This includes completing a three-part series designed by CBIZ that includes why D&I is a business imperative for CBIZ, understanding unconscious bias and its impact on our workplace, and strategies to overcome differences and adopt inclusive behaviors. A variety of books, films and other resources are featured on a dedicated D&I portal on CBIZ Central.

Enrichment Series

The Enrichment Series is a collection of programs designed to support and enhance the personal and professional growth of our associates. The following courses are CBIZ-developed and led by CBIZ HR Business Partners:

Supervisory Skills

- Behavioral Interviewing Skills
- Effective Performance Management Systems
- Effectively Conducting the Disciplinary Process
- Emotional Intelligence
- Managing Generational Differences

Leadership

The following is a sample of over 70 courses available as classroom or self-paced e-learning modules in the MyLearn library.

- Managing and Leading Others
- Problem Solving and Critical Thinking
- Time and Project Management
- Communication

Customer Service

Miller Heiman Group-authored courses 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

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

Personal Work Skills

There are numerous CBIZ-developed courses led by our HR Business Partners designed to assist team members of any level to build skills and strategies in order to be even more productive and successful. A sampling of the courses:

- Succeeding amidst Generational Differences
- Listening in a Hectic World
- Speaking to Influence Others
- Personal Strategies for Navigating Change
- Managing Life Outside Work: Handling Emergencies and Resisting Temptations
- In addition, team members may search the MyLearn library for self-paced e-learning courses by entering a competency or topic to see what is available.

MyLearn (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 onboarding, compliance courses, self-study courses, webinars, tutorials and training resources, and includes a calendar with registration capabilities for instructor-led sessions. MyLearn includes a direct link to MyCPE, our system which houses Continuing Professional Education (CPE) credits for our Financial Services associates.

Presentation Skills Workshop

In this 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 presentations and receive constructive feedback from the facilitator.

State-Specific Harassment Prevention Training

A growing number of states in the U.S. require specific training in addition to CBIZ-required training for harassment prevention. Our Corporate HR Learning & Development team oversees this training and assigns as applicable to ensure compliance.

Financial Services: Learning & Professional Development Programs*

Core National-Level Technical Learning

These 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 intended for Associates with two years or less of experience. The Senior Associate Conference includes 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 to 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 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.*

Tax Manager Symposium

This technical conference is intended for all tax Managers and Senior Managers. The program covers advanced technical topics that impact our clients in various areas of taxation. Attendees will build knowledge and consultative skills that will enable them to add value to our clients. In lieu of the Symposium, tax Managers and Senior Managers may be invited to the tax portion of the CBIZ & MHM Biennial Conference (discussed on next page).

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.

Associate Professional Development & Senior Professional Development Programs

These are nationally developed, locally delivered programs designed to supplement Core National-Level Technical Training by providing a platform for Associates' and Senior Associates' growth as professionals and leaders.

- The Associate Professional Development program offers Associates a smooth transition from school to the professional world, focusing on issues such as time management, receiving feedback and preparing for busy season.
- The Senior Professional Development program assists Senior Associates in developing strong client, internal and external relationships, focusing on issues such as delegation, giving feedback and goal setting.





Accelerate

Accelerate is a blended learning program that helps Associates through Senior Managers develop consultative and business development skills. The program focuses on 12 core skills understood to be characteristic of successful consultants and business developers, presented in a context appropriate for their level. Accelerate features multiple points of contact, utilizing a unique blend of self-paced, social and experiential learning.

Manager Professional Development

New Manager Orientation

This program 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.

Experienced Manager Workshop Series

These workshops are intended to help experienced Managers and Senior Managers further build the behavioral skills necessary to succeed in that role. Each workshop focuses on one core skill and vary from year to year. Previous workshop topics have included presentation skills, delegation for employee growth, and productive conflict and crucial conversations. All experienced Managers and Senior Managers are generally expected to attend at least one workshop per year.

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 an 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 event is 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.

Career Advisor Program

This program fosters employee growth by facilitating learning and development opportunities, coaching and feedback. External client-facing staff are typically assigned a Career Advisor within six months of employment. Advisors and advisees meet regularly to set performance and development goals, discuss progress toward those goals and maximize the value of formal and informal learning and development opportunities.

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 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.

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Benefits & Insurance: Organization & Talent Development

Leadership Development

The leadership development courses are offered across the country both in person and virtually and are required for anyone who holds a management or supervisory position. To complete each course successfully, application of the information learned must be demonstrated.

Foundations of Management

Foundations of Management focuses on helping leaders address the key opportunities and challenges when managing individuals. This very intense course covers the entire performance management cycle, which includes interviewing, performance planning, coaching, counseling and performance appraisal meetings.

Foundations of Leadership

Foundations of Leadership builds on the knowledge learned in Foundations of Management and focuses on areas of leading individuals that are more complex. Included in the class is a discussion of a variety of leadership models, creation of a personal leadership philosophy and learning

a variety of tools to approach daily leadership challenges, including managing priorities, delegation, giving and receiving feedback, and building a strong, positive culture, as well as an introduction to both change and conflict resolution.

Additional development opportunities include:

- Presenting Virtually
- Building a High Performing Team
- Coaching-the-Coach Certification
- Training-the-Trainer Certification

Professional Development

Online development opportunities focusing on key topics, ranging from communication to project management to negotiation, are provided to all in our “Professional Development Toolboxes.” Articles, videos, assessments and book recommendations are included.

Organization Development

Coaching is offered for leaders across the division to strengthen effectiveness and provide additional growth opportunities. Approval is required.

Customized teambuilding is provided to teams who seek to improve, grow and strengthen.



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 HCM also offers employees the opportunity to obtain their SHRM-CP, SHRM-SCP and CPA designations.

CBIZ Benefits & Insurance Services Sales & Training Conferences

These biennial two-day events focus on professional development, specifically business development and industry updates. In addition, every other year each Benefits & Insurance Services business (Employee Benefits, Human Capital Management, Talent and Compensation Solutions, Retirement Plan Services and Property & Casualty) holds a sales and training conference focusing on industry-specific content.

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



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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. 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

QuickHelp

Select "QuickHelp" under Applications on CBIZ Central to access your personal BrainStorm QuickHelp portal for learning about Microsoft Office 365. Features include video content, assessments, live events and more. And, you can earn badges and compete with other team members for a place on the leaderboard!

United Training

CBIZ partners with United Training to provide a national discount to a variety of end-user application and technical training. Details are available at CBIZ Central > My Resources > Employee Materials > Training & Professional Development.

HCM: CBIZ HR Information System

HCM is our Human Resources information platform. Training about HCM, as well as goal setting, performance documents and other user guides are available on the Training & Professional Development page on CBIZ Central.

CBIZ Channel

The CBIZ Channel, located on CBIZ Central > Information Technology > Training, provides access to a wide array of resources in video format. These include training on software tools, webinar recordings, event activities, messages from our CEO and more.

Social Media

Access CBIZ Central > Corporate > Marketing > Social Media to learn about 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 Frontline Selling
- How to Participate in the CBIZ Twitter Program
- LinkedIn: How to Utilize Proven LinkedIn Techniques
- Setting Up Your Digital Email Signature





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*MHM (Mayer Hoffman McCann P.C.) is 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.