

# Warehouse-Manufacturing Team Lead Certification Program

## Course Descriptions

### Unit I: Week 1 - Inventory Management Tools

In Unit One you will be introduced to one of the most powerful tools available for inventory management in a warehouse or manufacturing environment– Microsoft Excel. Companies in a wide range of industries use Excel to help capture and organize inventory information. Excel also allows you to manipulate information and display it so that you can quickly and effectively communicate with others in your organization. In this Unit you will learn the basics of navigating through Excel and some of its core applications. You will also have the opportunity to practice your new-found knowledge in real life scenarios.

#### Module 1: Microsoft Excel 2016 Essentials: Creating, Editing, and Saving Workbooks

Microsoft Excel 2016 makes it easy to create worksheets and workbooks, and to manage and manipulate data. In this course, you will learn how to cut, copy, and paste data; navigate between data cells and worksheets; and customize your Excel workspace. You will also learn about creating and opening workbooks, moving data around in Excel 2016, organizing worksheets, and saving and exporting data.

#### Module 2: Microsoft Excel 2016 Essentials: Formulas and Functions

Microsoft Excel 2016 allows you to perform complex calculations on your workbook data. Being able to use formulas to complete calculations not only simplifies your work but also helps to reduce the number of errors that can arise in such complex tasks. In this course, you will learn about the basic concepts and terminology associated with formulas and functions. You will learn about the various ways of referring to cells and cell ranges, and how to use basic functions including logical and IF-type functions.

#### Module 3: Microsoft Excel 2016 Essentials: Formatting Data

Making your data look good is easy in Microsoft Excel 2016. You can format numbers and text, and apply styles to make your data stand out. In this course, you will learn how to create custom formatting and styles, and copy formatting from cell to cell. In addition to formatting and styling data in Excel 2016, you will learn how to position the data in your spreadsheet.

## Unit II: Week 2 - Supply Chain & Inventory Management

Unit Two focuses on some of the essential functions that a Team Lead needs to concentrate on in a warehouse or production environment. As a Team Lead you are a key link in the supply chain of your organization and this Unit explores the basics of operations management and how this in turn connects to supply chain and inventory management. You will examine a variety of strategies that can be applied in a warehouse-production environment. You will also expand on your knowledge of Excel from Unit One and how the program can be used to effectively communicate key data.

### Module 1: Operations Management Functions & Strategies

Operations management is critical for the success of any organization. It involves designing, planning, directing, and controlling all the activities that transform resources into goods or services. In this course, you'll learn about the key functions of operations management. You'll be introduced to the general characteristics of operations in the manufacturing and service sectors, as well as common operations strategies. You'll also learn about a process for formulating organizational strategy, and about the main types of transformations that organizations perform.

### Module 2: Supply Chain Management Basics: Cutting Costs and Optimizing Delivery

Supply chain management, which is an integral part of operations management, is essential for both manufacturing and service organizations. It involves coordinating all the operations involved in designing, making, and delivering products or services to customers in order to manage costs and meet customer demands as efficiently as possible. In the course, you'll learn about the main components of a supply chain, the key objectives and drivers of supply chain management, and the characteristics of supply chain management in service organizations. You'll also learn how to select and combine appropriate supply chain management strategies, and how to measure their efficiency by considering certain key performance areas.

### Module 3: Inventory Management: Aligning Inventory with Production and Demand

Ensuring inventory always aligns with real production needs and customer demands is no simple feat. However, getting this right can dramatically reduce costs and enable a company to meet customer demand quickly, efficiently, and ahead of its competitors. Operations managers

can play a vital role in managing inventory. This course introduces key inventory management concepts and strategies, for use in both manufacturing and service organizations. It describes methods for valuing inventories, as well as common costs associated with ordering and holding inventories, including stock-out and other opportunity costs. It also walks learners through the process of calculating economic order quantities and reorder points for inventory, and provides an overview of some popular inventory management tools, including ABC analysis, material requirements planning (MRP), enterprise resource planning (ERP), and just-in-time (JIT) management.

## Unit III: Week 3 - Leading a Team

Unit Three focuses on the specific skills that are needed for developing an effective team and then managing team members. In a warehouse-production environment Team Leads have to be able to ensure that their team is meeting the expectations of their organization. This means being able to manage a variety of challenges. Every member of your team will come to their positions from a different perspective based on who they are and their background. It is the job of the Team Lead to be able to understand and manage their team for maximum effectiveness and efficiency. In this unit you will reflect on the supervisory and leadership skills and strategies that you will need as you move into a managerial role.

### Module 1: The Reality of Being a First Time Manager

Most new managers don't realize how much their new role differs from that of an individual contributor. Often, they have misconceptions about what managing entails, and they may be surprised to learn that the skills and methods required for success as an individual contributor and those needed for success as a manager are very different. This course describes some of the myths about management and their corresponding truths in order to clarify what managers really do. It also points to the typical demands and constraints of a manager's job. Finally, it describes strategies for dealing with common mistakes of first-time managers.

### Module 2: Facing Challenges as a First-Time Manager

High expectations are often placed on first-time managers. Along with these expectations comes the pressure to succeed and the need to prove you belong in a management position. Establishing credibility early and building new working relationships can go a long way in helping a first-time manager succeed in adjusting to his or her new responsibilities. This course describes ways to establish credibility and manage former colleagues effectively. You'll also learn how to balance conflicting expectations as a manager.

### Module 3: Leading Teams: Establishing Goals, Roles, and Guidelines

The way in which a team is built is an important factor in determining team success. Leading a team quickly and smoothly into high performance mode requires laying the foundation by setting team goals, identifying project tasks and assigning the right people to them and defining the

standards of team behavior to ensure team members work together so that team objectives are met. This course covers techniques for laying the foundation for a successful team. These techniques include setting team goals, assigning roles to individual team members and defining specific guidelines that outline how team members should behave to minimize conflict and optimize team performance

## Module 4: Achieve Your Objectives through Effective Delegation

Have you ever heard one of these phrases: 'If you want to get on in an organization, never make yourself indispensable, make yourself redundant!', or maybe 'If you want something done give it to a busy team!' or perhaps 'Don't work hard, work smart!' What all these are really saying is the same thing - learn to delegate effectively. If you can give the right tasks in the right way to your team, you will motivate them, grow their ability to act alone, and free yourself and your time for challenging tasks and roles fulfilling everyone's objectives. In this course, you'll first learn about the impact of different delegation styles. You'll then be introduced to principles you can use to help you decide what to delegate and to whom.

## Unit IV - Week 4: Managing a Team

Unit Four explores in greater depth the challenges that a Team Lead encounters in the management of individuals in their teams, and the skills and processes that need to be applied. In addition to managing what team members do, the behaviors of team members also need to be managed. In the unit how to approach challenging behaviors of team members is covered. As part of this, how to communicate effectively is examined. In this unit you will reflect on how team member behaviors can have positive or negative effects on overall team performance and the workplace atmosphere. Building on your own experiences you will identify how the strategies from this unit can be leveraged by Team Leads.

## Module 1: Building the Foundation for an Effective Team

The way in which a team is built is an important factor in determining team success. Leading a team quickly and smoothly into high performance mode requires the groundwork of pulling the right team together, setting team goals, and defining the standards of team behavior. In this course, you'll learn about the five stages of team development and strategies for selecting high-performing team members most suited for your project or team. You'll also learn about laying the foundation for a successful team, including setting team goals, assigning roles to individual team members, and defining specific guidelines that outline how team members should behave to minimize conflict and optimize team performance.

## Module 2: Developing a Successful Team

Anyone who has worked in a project or team environment will tell you that team dynamics make a huge difference in the working environment. Developing effective project teams is one of the primary responsibilities of a team leader. In this course, you'll learn how to develop the team culture early on by establishing team member competencies and working to improve team

dynamics. You'll also learn about methods used to encourage team participation and motivation and increase team members' commitment. Finally, you'll learn about the importance of assessing and improving team performance. Establishing a successful team involves ensuring that team members can communicate with you and with one another and that they will work as a team rather than as individuals. Clear channels of communication are required for both on-site and virtual teams. In this course, you'll learn techniques for encouraging effective communication and overcoming communication problems. You'll also learn strategies for encouraging team collaboration. Finally, you'll learn about tools and technologies that are commonly used for virtual team communication and key considerations for establishing virtual communication guidelines.

### Module 3: Encouraging Team Communication and Collaboration

Establishing a successful team involves ensuring that team members can communicate with you and with one another and that they will work as a team rather than as individuals. Clear channels of communication are required for both on-site and virtual teams. In this course, you'll learn techniques for encouraging effective communication and overcoming communication problems. You'll also learn strategies for encouraging team collaboration. Finally, you'll learn about tools and technologies that are commonly used for virtual team communication and key considerations for establishing virtual communication guidelines.

### Module 4: Handling Team Conflict

Successful teams are characterized by having a clear direction, trust among team members, effective communication, and the ability to quickly resolve conflict. The survival of a team depends on a team leader who can quickly recognize conflict, diagnose its cause, and use strategies to resolve the issue. In this course, you'll learn about what causes conflict on a team and the important role of healthy communication in handling conflict. You'll also learn about best practice approaches to resolving conflict and the tenets of principled negotiation. Finally, you'll learn guidelines for addressing one type of team conflict, lack of trust.

## Unit V: Week 5 - Communicating with Your Team

Effective Team Management requires effective communication. Unit Five focuses on the importance of being a great listener as part of the communication process. Being able to listen to team members so that you truly understand what they are saying requires development of the skill of active listening. The first two modules in this Unit revolve around developing this skill. But communication today also occurs in other forms such as e-mail and instant messaging. Strategies for how to best use these workplace forms of communication will be explored to help build your overall communication skills set.

### Module 1: Active Listening Skills for Professionals

Active listening skills are time-tested tools used by professionals in a wide range of occupations to enhance their work. Psychologists, talk show hosts, or police negotiators may use active listening skills more than any other set of skills. Though you may not be counseling someone in distress, getting a celebrity to reveal their emotions, or bargaining for hostages, the principles of active listening are the same. Active listening means listening attentively to the speaker's words, meaning, intent, and emotions in an unbiased positive way. Active listening also involves creatively utilizing a blend of discrete skills that can be brought to bear in any conversation to draw out additional meaning, intent, and emotions. In this course, you'll review more advanced listening skills to help you operate more effectively in your workplace. These skills include how to prepare your mind to actively listen, how to actively demonstrate "I'm listening," how to draw out thoughts and emotions from speakers, and how to steer conversations and ensure understanding.

### Module 2: Mastering Active Listening in the Workplace

Success in the most difficult professional conversations can depend on the creative deployment of active listening skills. There are critical moments in our professional lives where the active listening toolkit can make the difference between excellence and failure. Whether it be addressing the angry client, emotional subordinate, evasive witness, or hesitant buyer, effective listening can be the foundation of how you navigate and control the conversation, and achieve the results you desire. Excellent and persuasive communicators employ a creative blend of the skills tailored to each unique situation. In this course, you'll review the skills and techniques for mastering active listening. You'll learn to trust the process, engage evasive speakers, effectively steer emotionally charged conversations, and apply active listening within sales and negotiation scenarios.

### Module 3: Using e-mail and Instant Messaging Effectively

In today's fast-paced world, information is sent and received more rapidly than ever before. But how do you ensure that the messages you are sending are effective, acceptable, and will be taken seriously? The use of proper e-mail etiquette is the cornerstone for ensuring your

message gets across quickly, appropriately, and concisely. This course covers the basic requirements for using e-mail to communicate effectively. Specifically, you will be introduced to tried-and-true guidelines for e-mailing effectively, fundamental elements every e-mail should contain, and the importance of keeping e-mails concise. The course also covers the etiquette associated with using instant messaging programs as an extension of e-mail.

## Unit VI: Week 6 - Making Decisions

Unit Six focuses on a key requirement of managers – solving problems and making decisions. As a Team Lead you also have to do these things while working with a diverse team who may have a variety of viewpoints. This Unit provides you with a range of strategies to identify possible solutions, evaluate them, and make a decision while also taking into account the views of your team and the goals of the organization. In this final unit you will be asked to reflect on your own experiences working in a warehouse or production environment and then consider how you will be able to build on your experience and your strategies in the role of a Team Lead.

### Module 1: Management Essentials: Managing a Diverse Team

The population as a whole is becoming ever more diverse. Naturally, these societal changes are mirrored in the workplace. The most forward-looking organizations recognize the importance of managing a diverse workforce effectively. In turn, those managers who have the skills to lead a diverse team successfully are highly valued. This course describes what diversity is, including its benefits. It also covers how to prepare to manage a diverse team by understanding key diversity issues and setting ground rules. Finally, it delineates techniques for managing a diverse team. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

### Module 2: Solving Problems: Framing the Problem

Clearly articulating a problem requires asking the right people the right questions. Having all that information will make finding the root cause easier than if you tried to solve the problem in isolation. Framing the problem accurately requires finding out who affects and is impacted by the problem. It also requires identifying the reason(s) the problem exists. In this course, you'll learn how to identify stakeholders and effectively elicit their input. You'll find out how the causes of problems can lie at different levels of the organization, and you'll learn techniques to uncover the root cause.

### Module 3: Solving Problems: Generating and Evaluating Alternatives

Before generating alternative potential solutions to a problem, it's helpful to have a sense of the 'ideal state' – what the situation would look like if people had a magic wand. This provides some direction to those coming up with new ideas. After all, it's helpful to know if you're heading north

or south before leaving your driveway, right? Once ideas and alternatives are on the table, evaluating which ones are the best to implement can be a daunting task. In this course, you'll first learn how to elicit descriptions of ideal states. Next, you'll find out how to use basic techniques for generating and evaluating alternative solutions to a problem. Finally, you'll learn to recognize and avoid common pitfalls that can occur while generating and evaluating alternatives.

## Module 4: Choosing and Using the Best Solution

The time has come to make a final decision. In this course, you'll learn how to make smart decisions based on key criteria and decision-making styles. You'll also learn how to plan, manage, evaluate, and celebrate solution implementation.