

# moneris



## Training

**moneris**  
academy

[moneris.pt](http://moneris.pt)

## Examples of training solutions:

<b>Management and Administration</b>	7	<b>Human Resources</b>	7
Finances for non-financial staff	7	Preparation of the Training Plan and Training Management	14
Good Management Practices - Financial Reporting	7	Updating according to Labour Legislation	7
Customer credit and collection management	7	Grants and Incentives to Hiring	7
How to make a Business Plan	17	Hiring workers: demands, challenges and incentives	7
Time Management and Communication at Work	7		
Good Management Practices - Financial Reporting	7	<b>Social responsibility</b>	
Cash flow forecasting, management and control	14	Managing the family budget	7
<b>Finances Accounting and Taxation</b>	9	<b>Health and safety at work</b>	
Consolidation of Accounts	9	General Principles of Health and Safety at Work	4
Reading and analysis of accounting and financial statements	8	General Emergency and Evacuation Procedures	4
Tax Planning	9	Basic Fire-Fighting	4
		Basic First Aid	4
<b>Commercial and Marketing</b>	7	<b>Information Technologies</b>	
Finances for Sales Staff	7	Microsoft Word - Basic	7
Building Customer Loyalty and Increasing Sales	14	Microsoft Word - Advanced	7
Negotiation	7	Microsoft Excel - Basic	7
Customer Service and Customer Relations	7	Microsoft Excel - Advanced	7
Social media marketing	7		
		<b>Privacy and Data Protection</b>	
<b>Leadership</b>	11	Privacy essentials	4
Motivation and Teamwork	11	Practical application of GDPR	16
Time Management and communication	7	The role of the Data Protection Officer (DPO)	8
Work organisation and planning / processes	11	Cyber risk and the challenges of e-privacy	4
Leadership and team management	7		

## Certifications

We develop training activities in accordance with the best quality parameters, also allowing clients to integrate the training provided under the respective Employment Law obligation, thus Moneris Academy is now certified by DGERT - Directorate General for Employment and Labour Relations, in the following areas:



Finance,  
Banking and  
Insurance



Accounting  
and Taxation



Management  
and  
Administration



Commercial  
Marketing



IT

Moneris Academy is also recognised by the largest Portuguese professional association - the Association of Certified Accountants (OCC).



ORDEM  
dos CONTABILISTAS  
CERTIFICADOS

# The path to success begins with knowledge.

At Moneris we believe that human capital is an organisation's most important resource. Maintaining a high degree of human resource motivation and constant updating is therefore a key factor in keeping your organisation competitive, and following best practices and technical and behavioural trends.

Our deep knowledge of the Portuguese business world and, above all, the constant adaptation of our offer to market needs, make Moneris Academy a partner of choice when it comes to training, as we rely on a wide range of trainers with strong technical expertise and pedagogical aptitude.

We actively respond to the training needs of the market, presenting relevant content for the development of companies and businesses and promoting specialisation of their employees, in subjects designed according to each company's specific needs.

We have a wide range of CCP - Certificate of Pedagogical Skills - trainers who, in addition to being experienced technicians and professionals, possess certified pedagogical aptitude, ensuring that trainees gain an effective understanding of the subjects.

For greater effectiveness, we have promoted the specialisation of our professionals in a wide range of subjects, concentrated in the areas of Management and Administration; Finance, Accounting and Taxation; Commercial and Marketing; Leadership and Management; Human Resources; Information Technologies; Privacy and Data Protection; others.



## Executive Academy

The Moneris Executive Academy is geared towards entrepreneurs and senior company management, with the goal of developing distinctive training activities that promote the acquisition of knowledge, skills and creativity, enhancing human capacity and activity.

The Executive Academy therefore aims to develop skilled and entrepreneurial leaders capable of meeting the challenges of today's globalised economy.

The training activities to be undertaken, in this context, will have an emphasis on the quality and real applicability of training, based on the best global management practices, where entrepreneurs and managers will be able to develop and share new knowledge with a view to the sustainable economic growth of their companies.



## Action training

The main objective of action training projects is to undertake a training dynamic that enables participation with learning in an organisational context, which mobilises and internalises competences in pursuit of results, supported by a strategy of organisational change, designed for each company's circumstances.

Thus, the development methodology of this type of project is based on the following model, which incorporates, in very general terms, consulting and tailor-made training.





## Tailor-made Training

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Aware that each organisation has specific and particular training needs, Moneris Academy has built a modular solution, characterised by its flexibility and adaptability to each business context.

The Moneris Academy Customised Integrated Solution features a unique and innovative methodology in the area of training, characterised by:



A modular construction managed by the client, according to the training areas best fitted to their needs;



A workload combination for each module tailored to the client's training objectives.

This training programme aims to meet not only general training needs, but also the legal obligation to train employees (35 hours per year for each employee), with the main objectives of developing participants' skills and knowledge:

- In terms of behavioural and interpersonal skills, central to excellent teamwork, planning and development of technical work, which is often not carried out correctly, not because of a lack of technical competence, but because of difficulties in interpersonal relationships, teamwork and organisation and planning;
- In the field of elevating the role of the company among its employees, according to a philosophy of social responsibility, we also propose the incorporation of an area related to the effective management of the household budget. The aim is to enhance greater financial sustainability of the household, and thus allow employees to relieve any tension that may affect them at work;
- In the area of obligations related to health and safety at work, which has many implications when incidents occur, concerning the productivity of the company as well as aspects related to the motivation of employees.



# moneris

## We share your vision of the future.

Moneris has a customer-focused approach with an integrated offer of services and solutions that allows it to deliver 360-degree management support to organisations, promoting excellence in financial information and improving decision-making processes that are critical for their success.

We are the largest national accounting and management support group, present from the north to the south of Portugal, with a network of 18 offices supported by some 300 consultants.

Our services are provided by teams with in-depth knowledge of all industry sectors, which means that each client benefits from the support of professionals who understand their challenges and help them to overcome every obstacle. Knowing our customers well is essential for us, so that we can proactively address their needs.

- accounting and reporting
- tax
- human resources
- corporate finance
- risk and compliance
- insurance management
- training

**moneris.pt**

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