



AMTS Handbook Development Study Guide

Two four hour workshops with a business plan extension

Prepared for Greg Witter | October 23, 2026 | Draft 3

Learn to turn approved source material into a useful handbook and a professional presentation of it. The AMTS associate handbook is the worked example. Learners adapt the method to their own employee, associate, student or volunteer setting; policies must fit that setting.

Course development draft. This edition preserves earlier source documents. Approval and unresolved decisions are identified inside.

Workshop one from evidence to policy

Outcome: produce a source register, an audience-specific outline and two reviewed handbook sections.

Prerequisites: an approved mission statement, existing policy sources, designated decision-maker, computer with document software, and authorized AI access if used. Use fictional material when private records are unnecessary. Required professional review cannot be replaced by an AI-generated policy.

Minutes	Activity	Output
0–20	Identify audience and purpose	Reader and use statement
20–50	Instructor models source and conflict review	Evidence register
50–80	Learners classify facts proposals and gaps	Decision list
80–90	Break	
90–125	Build handbook outline and authority map	Section plan
125–170	Draft two sections in plain language	Working draft
170–180	Break	
180–215	Peer review using sources	Annotated corrections
215–240	Independent teach-back and next steps	Reviewed draft and review route

Instructor demonstration

Compare the older AMTS compensation proposal with the later training-first clarification. Show why a historical number cannot become a current promise just because it appears in a polished document. In classroom copies replace private rates and names with fictional examples. Demonstrate a conflict register before drafting the policy.

Student exercise

A fictional organization has an old benefits proposal, a new scheduling decision and an unsigned onboarding draft. Mark each statement as adopted, proposed, historical or unknown. Draft a one-page orientation section that tells the reader what applies and where unresolved terms will be settled. Explain which authority must review it.

Workshop two from draft to booklet

Outcome: export a readable handbook sample, an approval record and a presentation board. Bring the first workshop outputs, approved logo and brand assets, and access to Word or equivalent software with PDF export. The sample should include a cover, two policy sections and one usable form.

Minutes	Activity	Output
0–20	Review purpose and unresolved decisions	Release scope
20–55	Demonstrate styles cover and navigation	Document structure
55–85	Learners format their samples	Readable pages
85–95	Break	
95–135	Build a practical form and review checklist	Working form
135–175	Export and inspect every page	Corrected PDF
175–185	Break	
185–215	Create presentation board and sanitize sample	Portfolio draft
215–240	Independent demonstration and assessment	Handoff and next actions

Procedure and reasons

Preserve the original and work in a new version. Apply real heading styles for consistent navigation. Use the organization's approved logo and restrained color with sufficient contrast. Put comparison data in tables and policy explanations in prose. Export to PDF, inspect every page for clipping and broken spacing, then test links. Keep the editable source beside the viewable file.

Common problems and recovery

If a table splits badly, shorten the content or adjust columns before shrinking the type. If the document looks authoritative but contains unresolved terms, restore clear draft labels and route decisions. If a public sample exposes private information, stop sharing and create a separate sanitized copy. If a link works only on the creator's computer, test the final published location anonymously.

Learner worksheet and assessment

Planning worksheet

Audience and handbook type _____

Reader task this handbook supports _____

Source owner and review authority _____

Adopted policies _____

Proposals that must stay marked _____

Questions for specialist review _____

Information excluded from public samples _____

Approved formats and delivery location _____

Assessment standard

Criterion	Evidence of completion
Accuracy	Every material policy is traceable to an approved source or clearly marked proposal.
Audience fit	Language and forms fit the actual employee associate or student relationship.
Privacy	Public sample excludes private identities compensation and credentials.
Usability	Readable cover headings body and form; exported pages and links checked.
Independence	Learner repeats an edit exports it and explains the review route.

All five criteria must be demonstrated for this course exercise. Any privacy exposure, invented adoption or materially wrong term requires correction and reassessment. Course completion means the learner met the exercise standard; it does not certify legal compliance or authorize the organization to adopt the handbook.

Follow through

Save the final sample, source register, change record and assessor feedback together. Identify the owner of each unresolved decision. In the next work session, apply the same procedure to one additional section and ask the learner to explain the checks without relying on the instructor. Record development time separately from the planned eight classroom hours.

Business plan workshop extension

This separate four-hour block uses the AMTS business plan as a case. Outcome: a one-page business model, an explicit financial scenario and a presentation board. Prerequisites: a business idea or existing operation, known customer problem, approved source facts and spreadsheet or calculator access. No real customer or financial record is required for the fictional exercise.

Minutes	Activity	Result
0–30	Identify customer problem and evidence	Audience hypothesis
30–65	Define offers and pricing units	Offer comparison
65–90	Map delivery and owner capacity	Operating plan
90–100	Break	
100–145	Build receipts costs and break-even scenario	Labeled assumptions
145–180	Choose validation steps and measures	90-day action plan
180–190	Break	
190–220	Build and present one-page board	Presentation draft
220–240	Assess calculations and evidence	Corrected plan

Exercise and expected output

Use fictional tuition of \$200, variable cost of \$20 per learner and fixed session cost of \$500. Calculate results at two, four and six paid seats. Receipts are \$400, \$800 and \$1,200; contribution after these assumed costs is – \$140, \$220 and \$580. Three paid seats cover the stated costs. Explain what happens when owner compensation or extra preparation is added.

Assessment and teaching status

Require correct calculations, separated cash and noncash activity, explicit assumptions, a testable customer hypothesis and a realistic next action. Learners must distinguish a planning scenario from a sales forecast. These agendas and exercises are prepared course material; the course has not been piloted or accredited. Field testing and instructor notes remain next steps.