

# THE MATHIS GROUP, INC. TRAINING COURSES

THE MATHIS GROUP MISSION IS TO PROVIDE QUALITY, CUSTOMIZED TRAINING AND CONSULTING SERVICES THAT INSPIRE, EDUCATE, AND EQUIP ORGANIZATIONS TO BE BETTER TOMORROW THAN THEY ARE TODAY.

PRESENTATIONS  
THAT EDUCATE, MOTIVATE,  
AND INSPIRE



A WOMAN-OWNED SMALL BUSINESS

9515 N Spring Valley Dr  
Pleasant Hope, MO  
65725  
800-224-3731  
(417) 759-9110 voice/fax

[www.themathisgroup.com](http://www.themathisgroup.com)  
[www.pmexpertlive.com](http://www.pmexpertlive.com)  
[wanda@themathisgroup.com](mailto:wanda@themathisgroup.com)  
[keith@themathisgroup.com](mailto:keith@themathisgroup.com)

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WOMAN-OWNED SMALL BUSINESS  
PROJECT MANAGEMENT INSTITUTE - REGISTERED GLOBAL EDUCATION PROVIDER



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## MEET DR. KEITH MATHIS, PMP, PMI-ACP



*Speaker, Trainer, and Seminar Leader  
Specialist in Organizational Behavior  
and Development*

**The Mathis Group, Inc.  
9515 N. Spring Valley Dr.  
Pleasant Hope, MO 65725  
800-224-3731  
(417) 759-9110 Fax  
keith@themathisgroup.com  
www.themathisgroup.com  
www.pmexpertlive.com**

Over the last several years, Dr. Keith Mathis has emerged as one of the most effective business trainers in the field traveling throughout the United States, Canada, Mexico and South America. His provocative, informative, and humorous presentations on a variety of organizational development topics are demanded by progressive companies. Keith never merely talks to an audience, but he also seeks to involve them in his presentations through high content and numerous illustrations. Intellectually demanding of himself, Keith demands no less of his audiences.

As a consultant who specializes in project management and organizational behavior/development, he comes with thousands of presentations to every kind of organization. He is flexible by teaching in full-day formats, multi-day conferences or one-hour keynotes for conventions. His work includes teaching corporate America skills on topics such as team building, leadership, motivation, conflict resolution, project management, supervision, performance appraisals, goal setting and numerous other organizational proficiencies. His problem solving expertise provides him with the ability to help companies in the solving of the most complex difficulties.

He is founder of The Mathis Group, based in the Springfield, Missouri area. The Mathis Group, a Registered Education Provider with PMI, offers a variety of courses which provide Professional Development Units (PDUs) for individuals who are seeking certification through one of the credentials of PMI®. The Mathis Group is also a woman-owned small business with a Federal GSA contract. Project Management training has been conducted for agencies such as FCC, USDA, and FAA. The States of Missouri and Kansas have contracted for training, as well as non-government organizations such as PPL Corporation and JP Morgan.

Keith continues to broaden his knowledge base and practical advice by teaching. He serves as an online adjunct professor of business/management at DeVry University and Liberty University.

Keith has authored numerous training programs as well as magazine and newspaper articles. He has written two books, *Dinosaur Tracks: Modern Leadership Strategies for Changing Employee Performance and Behavior* and *21 Deadly Project Management Mistakes*.

Keith holds a B.A. in Behavioral Science, a M.S. in Management, and a Ph.D. in Administration Management. He is certified as a PMP® (Project Management Professional) and a PMI-ACP® (Agile Certified Practitioner) by Project Management Institute. He is also a COI (Certified Online Instructor).

# *Capability Statement*

The Mathis Group, Inc. is a training/consulting company who has been serving businesses, government agencies, and organizations since 1993. We pride ourselves on offering quality, customized training/consulting that inspires, educates and equips people. The Mathis Group is a woman-owned small business and is in the process of finalizing WBE status.

The Mathis Group has a GSA MAS contract (GS02F0010V) and has conducted training for several government agencies. Our courses have found their way into the Federal Aviation Administration (FAA), United States Coast Guard, Federal Communications Commissions (FCC), Internal Revenue Service, Drug Enforcement Administration, National Institutes of Health, United Nations, and US Department of Agriculture, just to name a few.

The Mathis Group has been a Registered Education Provider (REP) with Project Management Institute (PMI) since 2003. We are committed to enhancing the ongoing professional development of PMI Members, PMI-certified Project Management Professionals, and other project management stakeholders through appropriate project management learning activities and products. We have agreed to abide by PMI established operational and educational criteria and are subject to random audits for quality assurance purposes. We have over 40 courses in our curriculum which have been registered with PMI and qualify for Professional Development Units (PDUs). The Mathis Group, Inc. conducts classes both onsite and in public formats across the United States.

In 2015, The Mathis Group began our second 7-year contract with State of Kansas to conduct their project management training. Courses range from a 1-day *Fundamentals of Project Management* to a 3-week intensive *Project Management Certification* class. We also continue our work with State of Missouri in providing their project management training on an “as needed” basis. Our work with their different agencies range from *Business Analysis Certification* to *Agile Project Management*.

The Mathis Group is an expert in conducting boot camps for the PMP®/CAPM® (Project Management Professional) exam preparation and the PMI-ACP® (Agile Certified Professional) exam preparation. We conduct public boot camps throughout the year in various cities throughout the United States along with many onsite boot camps in various companies and agencies.

The Mathis Group’s instructors are experienced, credentialed professionals who are experts in their field. Dr. Keith Mathis is the founder/co-owner of The Mathis Group, Inc. and often conducts the training days himself.

## **Company Designations**

Woman-Owned Business

GSA: GS02F0010V

NAICS: 611430

DUNS: 007722098

CAGE: 3C1N9

PMI REP: 2022

# Customization Process

The customization process will demonstrate that The Mathis Group is prepared to write, customize, deliver, and manage this project with the highest quality team.

## *Design of program*

Designing this program will take place using strong customization principles that will influence the participants with strong content and application.

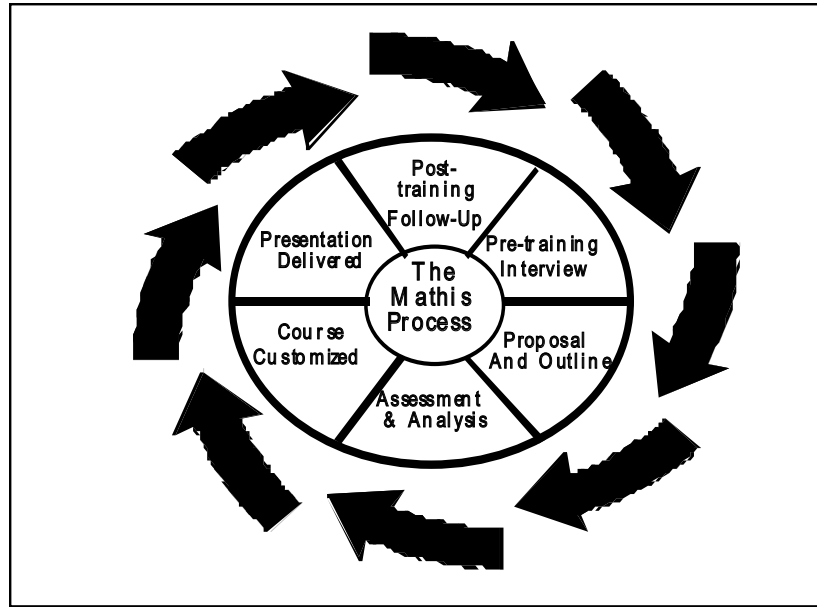


Figure 1

## **Why is customization important?**

Customization allows the course to be tailored to meet the particular needs of each organization. The Mathis Group believes each company has certain specific issues. Conducting a training course without understanding those differences will prevent successful changes in behavior or performance. When true customization is complete, that skill base is specific and slanted to the targeted needs of that organizational culture.

## **How is the course customized?**

You will notice in Figure 1 The Mathis Process. This process begins with a pre-training interview that gathers preliminary information. A general outline and proposal is developed and then followed by an assessment and analysis of your organization. Some of those needs will include culture, areas of strengths and weaknesses, application focus, and the best ways to implement the program.

## **Curriculum Design**

Curriculum designers who have a thorough knowledge of the subject matter have designed the material. All consultants are seasoned professionals with years of experience.

*(Continued on next page)*



This training program will focus on moving from the introduction of new skills to application for long term use. Each program must move beyond introduction toward application of those skills for long term performance and behavior changes. Using different activities to reinforce the new skills reinforces application.

The following activities may be included in one or all of the training programs:

- Lecture/leader-led
- Discussion
- Reading
- Role play
- Case study
- Video/audio presentation
- Test/quiz
- Self assessment

## Teaching Format

The Mathis Group creates a teaching/learning atmosphere that is very upbeat and interactive. In each session taught, we use a laptop, PowerPoint, and LCD/Proxima projector to introduce, explain, and summarize key concepts in the core competencies. Participants will have the opportunity to interact and engage in discussions and small group analysis as well as debriefs and action plans throughout the entire course. Courses are filled with small/large group discussions and activities, abbreviated case scenarios, as well as personalized action planning. Courses include numerous examples, fun, and ways to engage the participants in a non-threatening manner. Our trainers are available for consultation with the participants.

# The Mathis Group, Inc. is a PMI® Registered Educational Provider

The Mathis Group is a Project Management Institute (PMI®) Registered Educational Provider (R.E.P.) since 2003. We are committed to enhancing the ongoing professional development of PMI® Members, PMI®-certified Project Management Professionals (PMP®), and other project management stakeholders through appropriate project management learning activities and products. We have agreed to abide by PMI® established operational and educational criteria, and are subject to random audits for quality assurance purposes. We have over 40 courses to offer as a R.E.P worth Professional Development Units (PDUs).

# Different Learning Connections

The Mathis Group will also differentiate learning categories to influence the participants during the training sessions. We are well aware that participants learn differently. In order to magnify impact and implementation of new core competencies, we make sure each program is filled with numerous learning techniques. The following learning matrix will demonstrate the depth and category of learning. The Mathis Group takes careful steps of action to make sure we are influencing the participants through mental dynamics, exposure to new data, inspirational examples, fun activities, and application of new skills. This entire package of influencing the participants brings about the greatest change in performance and behavior.

Table #1

## Learning Matrix

### Learning Category Mental

### Characteristics

Each course involves techniques that stimulate thinking, deductive reasoning and decisiveness.

### New Data

Updated material and information are presented. Each course has deeper material provided with new techniques demonstrated.

### Inspirational Examples

Examples, illustrations, and analogies are used in each course to create interest, interaction, and impact.

### Activities

Activities and case studies are scattered throughout each course to lock down the new skills and their usage.

### Application

Steps of action are used to reinforce usage of new skills.

## Partial Government Client Listing

- City Government of Atlantic City
- Consumer Product Safety Commission
- Consumer Financial Protection Bureau
- Drug Enforcement Administration
- Federal Aviation Administration
- Federal Communication Commission
- Hawaii Coast Guard
- Internal Revenue Service
- Iowa Department of Child Enforcement
- Michigan Department of Civil Service
- Michigan Department of Housing
- National Imagery and Mapping Agency
- National Institutes of Health
- National Oceanic and Atmospheric Administration
- Saginaw Police Department
- Social Security Administration
- St. Louis City Police
- State of Kansas
- State of Michigan
- State of Missouri
- United Nations
- United States Department of Agriculture
- United States Postal Service

## Partial Client Listing

- Alumax Metal, Inc.
- Ameren
- American General Contractors Association
- Arch Cole
- Atlantic City Housing
- Beverly Farm Foundation
- Blue Cross and Blue Shield
- Broward Medical Center
- Brentwood Medical Center
- Career Track, Inc.
- Clyde Union
- Coopers & Lybrand
- Enterprise Leasing
- Entertainment Publications
- Exelon
- Federal Reserve Bank
- Flatter & Associates
- JP Morgan
- Kaiser Dental
- Knoll, Inc.
- Lear Corporation
- Lucent Technology
- Mallinckrodt Chemical
- Monsanto
- Motorola
- National Louis University
- Nova Southeastern University
- Oklahoma State University
- Phelps County Medical Center
- Portion Pak, Inc.
- PPL Corporation
- Protein Technologies
- Ralston Purina
- St. Louis Post Dispatch
- St. Louis University
- St. Luke's Hospital
- StarMed Staffing Group
- TCI
- United Van Line
- Veracity Engineering

# Course Description and Objectives

## Creating a Positive Work Environment - 1 Day *Changing Negative Workers Into Productive Employees*

**Course Description:** In this one-day course participants will learn ways to turn around negative situations in the workplace. They will outline new strategies to take action quickly, examine why negative situations ripple into every area of the organization, and create approaches which will turn a negative situation into an optimistic workforce.

### **Course Objectives:**

#### **Objective 1: Analyze the cost of negativity in U.S. organizations**

- Examine the definition of negativity
- Evaluate the challenges of the modern workplace

#### **Objective 2: Formulate a five step approach in examining negativity**

- Review the CIA way negativity grows
- Examine the inner/personal dialog
- Identify the family influence

#### **Objective 3: Discuss the effect of someone else's negativity on you**

- Assess ways for rebuilding trust
- Discuss situational, habitual, and chronic negativity
- Create stair steps toward negativity
- Compare results of negativity
- Compare ways in dealing with the negaholics

#### **Objective 4: Employee rules for confronting negativity**

- Analyze how to break the victim complex
- Define ways to impact negative culture
- Discuss how to fight personal negativity

#### **Objective 5: Create an action plan**

# Effective Problem Solving - 1 Day

## *Moving Ahead With Creative Solutions*

**Course Description:** This one-day course will give a step-by-step process for creating, solving, and implementing solutions to problems. This course will give input not only on processes, but also on ways to prevent failure and who should be on the Problem Solving Team. Each participant will understand numerous ways to brainstorm problems to come up with the best solution.

### **Course Objectives:**

#### **Objective 1: Discuss benefits of problem solving**

- Classify who should be on the problem solving team
- Evaluate why participation helps solve the problem faster
- Identify why people are frustrated with problem solving
- Review what influences the problem solving experience

#### **Objective 2: Define the problem solving processes**

- Assess the resources needed to fulfill the plan
- Examine creative solutions
- Compare what to do if you inherit a goofy solution
- Develop a SWOT Analysis
- Evaluate the four steps to Force Field Analysis
- Discuss the benefits of Force Field Analysis
- Define contingency planning and examine the crisis correctly

#### **Objective 3: Evaluate how to implement the solution**

- Discuss seven keys to problem solving implementation
- Identify the seven reasons for implementation failure

# How to Increase Communication and Get the Message Across - 1 Day

**Course Description:** This one-day course will focus on ways to use communication as a way to inform and influence others. Participants will understand how to focus a message and incorporate means to gain information using effective communication skills. This course will recommend ways of building stronger communication skills and will provide insight to different communication styles. Participants will learn new power by using certain words to impact the message and by asking questions that get noticed.

## **Course Objectives:**

### **Objective 1: Evaluate how to approach people**

- Analyze the value of small talk
- Identify perception
- Examine what impacts perception
- Compare reducing perception differences
- Discuss how to gain understanding
- Demonstrate what to do when you mess up

### **Objective 2: Analyze communication styles**

- Develop ways to increase understanding
- Compare kinds of communication
- Differentiate what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common
- Evaluate verbal softeners
- Discuss how to match your body language and the message
- Classify communication that calms people
- Classify characteristics of a poor listener
- Predict obstacles of listening

### **Objective 3: Describe ingredients of effective meetings**

- Define management's role in meetings
- Evaluate receiving feedback
- Design responses to negative feedback

### **Objective 4: Develop techniques for disagreeing**

- Discuss caution signs that a disagreement is turning into a conflict
- Formulate seven stages of intergroup conflict
- Describe ways to reduce intergroup conflict
- Recognize benefits of humor

# How to Increase Communication and Get the Message Across - 2 Day

**Course Description:** This two-day course will focus on ways to use communication as a way to inform and influence others. Participants will understand how to focus a message and incorporate means to gain information using effective communication skills. This course will recommend ways of building stronger communication skills and will provide insight to different communication styles. Participants will learn new power by using certain words to impact the message and by asking questions that get noticed.

## **Course Objectives:**

### **Objective 1: Evaluate how to approach people**

- Analyze the value of small talk
- Identify perception
- Examine what impacts perception
- Compare reducing perception differences
- Discuss how to gain understanding
- Demonstrate what to do when you mess up

### **Objective 2: Analyze communication styles**

- Develop ways to increase understanding
- Compare kinds of communication
- Differentiate what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common
- Evaluate verbal softeners
- Discuss how to match your body language and the message
- Classify communication that calms people
- Classify characteristics of a poor listener
- Predict obstacles of listening

### **Objective 3: Describe ingredients of effective meetings**

- Define management's role in meetings
- Evaluate receiving feedback
- Design responses to negative feedback

### **Objective 4: Develop techniques for disagreeing**

- Discuss caution signs that a disagreement is turning into a conflict
- Formulate seven stages of intergroup conflict
- Describe ways to reduce intergroup conflict
- Recognize benefits of humor

# **Present Like a Pro - 1 Day**

## ***Proven Techniques for Creating Presentations and Getting Results***

**Course Description:** This one-day course will focus on proven techniques for creating powerful presentations. Participants will understand how to arrange material and build a presentation to guide the listeners in your direction. They will examine suggestions on where to get information to give credibility and learn the hidden secrets that make the difference between a good presentation and a fantastic one. This course will focus on core competencies for each participant.

### **Course Objectives:**

#### **Objective 1: Identify the ten steps for creating an effective presentation**

- Develop realistic objectives of a presentation
- Discover how to interview the audience and customize your presentation
- Discuss how much preparation is needed to deliver a great presentation
- Identify proper questions that will give insight into the nature of the audience
- Examine how to get the main ideas of the presentation across with enthusiasm
- Classify and develop support material that makes the presentation interesting
- Organize the presentation and use transitions between main points
- Identify ways to deliver an effective introduction
- Evaluate the proper response when creating an effective conclusion
- Analyze the effective usage of audio-visual

#### **Objective 2: Define the basic hurdles in making a presentation**

- Discover the biggest reasons why poor presentations happen
- List poor presentation characteristics and how to avoid them

#### **Objective 3: Evaluate how to improve your presentation**

- Compare individual presentation body movements that must be changed
- Express the impact clothing has on the presentation
- Evaluate the usage of humor as a helper to your presentation
- Discover the impact of attitude on your presentation's success



# **Present Like a Pro - 2 Day**

## ***Proven Techniques for Creating Presentations and Getting Results***

**Course Description:** This two-day course will focus on proven techniques for creating powerful presentations. Participants will understand how to arrange material and build a presentation to guide the listeners in your direction. They will examine suggestions on where to get information to give credibility and learn the hidden secrets that make the difference between a good presentation and a fantastic one. This course will focus on core competencies for each participant. Not only will the class learn the theory behind becoming a great presenter, but they will also conduct three brief presentations. To do this, the class will have a pre-class assignment and homework during the evening. This can be adjusted to fit the participants' needs or desired outcome of the course.

### **Course Objectives:**

#### **Objective 1: Identify the ten steps for creating an effective presentation**

- Develop realistic objectives of a presentation
- Discover how to interview the audience and customize your presentation
- Discuss how much preparation is needed to deliver a great presentation
- Identify proper questions that will give insight into the nature of the audience
- Examine how to get the main ideas of the presentation across with enthusiasm
- Classify and develop supporting material that makes the presentation interesting
- Organize the presentation and use transitions between main points
- Identify ways to deliver an effective introduction
- Evaluate the proper response when creating an effective conclusion
- Analyze the effective usage of audio-visual

#### **Objective 2: Define the basic hurdles in making a presentation**

- Discover the biggest reasons why poor presentations happen
- List poor presentation characteristics and how to avoid them

#### **Objective 3: Evaluate how to improve your presentation**

- Compare individual presentation body movements that must be changed
- Express the impact clothing has on the presentation
- Evaluate the usage of humor as a helper to your presentation
- Discover the impact of attitude on your presentation's success

# Tough-Minded Facilitation - 2 Day

**Course Description:** This two-day course will teach participants ways to increase communication, balance input and gain deeper understanding for important meetings. Participants will learn ways to control meetings and keep them on task, while remaining professional. They will gain insights into agenda preparation, documentation, brainstorming techniques, and consensus building.

## Course Objectives:

### Objective 1: Discuss the definition of facilitation

- Illustrate benefits of facilitation and how it will help your organization
- Examine best ways to be prepared for facilitation sessions
- Discuss facilitation mess-ups
- Examine the creation and usage of a code of conduct for the session
- Recognize core duties which facilitators must do before, during, and after a facilitation session
- Discuss best practices for setting meeting objectives and goals
- Discuss five useful ways for brainstorming

### Objective 2: Evaluate how to engage the audience

- Analyze body language and tone of voice which individuals use to communicate
- Examine ways to clarify body language of others
- Analyze the proper usage of questions to engage the audience
- Formulate paraphrasing techniques for clarifying the meaning and message to others
- Compare different ways to use probing, bridging and redirecting skills

- Discuss the positives of having a devil's advocate
- Analyze assertiveness techniques to be used by facilitators
- Formulate a standard preparation plan for starting a facilitation
- Examine the role and functions of a recorder
- Discuss best practices for the recorder and creating minutes for determined actions
- Design rules for when using a buddy system during a facilitation session

### Objective 3: Analyze tactics for handling resistance

- Examine professional ways to handle the negative participant
- Evaluate the impact of conflict to the participants
- Analyze ways to research the opponents or participants
- Discuss best practices for ending a facilitation session

## Conflict Management - 2 Day

**Course Description:** This two-day course will focus on ways to reduce professional and personal conflict. Participants will gain insight into ways to acquire control of volatile situations and prevent conflict from escalating. They will receive clear steps of action for getting to the root of the conflict while using strong communication and listening skills. In addition, they will learn ways to facilitate bad situations, methods for gaining consensus, and negotiation techniques. This course supports Lombardo Core Competency number 12 on Conflict Management.

<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Define conflict</li> <li>• Discuss the positive side of conflict</li> <li>• Analyze 8 most common times for conflict</li> <li>• Interpret the 7 stages of intergroup conflict</li> <li>• Identify 6 reasons for conflict among workers</li> <li>• Compare rules for handling anger</li> <li>• Review assertiveness techniques</li> </ul>	<p><b><i>Steps up to conflicts, seeing them as opportunities</i></b></p>
<ul style="list-style-type: none"> <li>• Analyze hostility and how it surfaces</li> <li>• Examine how to handle personal and professional hostility</li> <li>• Compare levels of group conflict</li> </ul>	<p><b><i>Reads situations quickly</i></b></p>
<ul style="list-style-type: none"> <li>• Review active listening skills</li> <li>• Choose words to use that help the situation</li> <li>• Discuss hedge words people use to distort communication</li> <li>• Analyze techniques people use to avoid issues</li> </ul>	<p><b><i>Good at focused listening</i></b></p>
<ul style="list-style-type: none"> <li>• Examine confrontation techniques</li> <li>• Create questions to guide others through the process</li> <li>• Analyze ways to prevent arguing</li> <li>• Apply facilitation skills for allowing everyone to be heard</li> <li>• Discuss the facilitator's responsibilities</li> <li>• Discuss times to make amends</li> </ul>	<p><b><i>Can hammer out tough agreements and settle disputes equitably</i></b></p>
<ul style="list-style-type: none"> <li>• Create a code of conduct for controlling a resolution meeting</li> <li>• Compare ways to confront others while helping them save face</li> <li>• Create action plans for quick resolution</li> </ul>	<p><b><i>Can find common ground and get cooperation with minimum noise</i></b></p>

# Successfully Dealing with Conflict Without the Fireworks - 1 Day

**Course Description:** This one-day course will focus on ways to reduce professional or personal conflict. Participants will gain insight into ways to acquire control of volatile situations and prevent anger from escalating. They will receive clear steps of action for getting to the root of the conflict. Ways to facilitate bad situations, techniques for gaining consensus, and simple confrontation techniques that reduce stress will all be examined.

## **Course Objectives:**

### **Objective 1: Define conflict**

- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers
- Discuss the positive side of conflict
- Examine rules for handling anger
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict
- Identify seven stages of group conflict

### **Objective 4: Examine confrontation techniques**

- Compare ways to confront others while helping them save face
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard
- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

### **Objective 2: Review active listening skills**

- Discuss hedge words people use to distort communication
- Choose words to use that help
- Analyze techniques people use to avoid issues

### **Objective 3: Create action plans for quick resolution**

- Create a code of conduct for controlling a resolution meeting

# **Consultative Selling Skills - 1 Day**

## ***Building Relationships and Partnerships with Today's Customers***

**Course Description:** This one-day course will give participants the skills to increase their sales. Techniques on listening, building strong relationships, and closing skills are specially designed for the consultative style. The course will focus on areas for capturing key customers while discovering customer's buying habits and desires. This course will also give approaches a sales professional can use to lead the client or customer through the buying process in the least offensive way.

### **Course Objectives:**

#### **Objective 1: Examine myths of selling**

- Identify ways to create a win-win agreement
- Discover buying signals and body language
- Evaluate the real decision maker in the sale
- Analyze how listening can increase your closing rate
- Examine the process for building the relationship through interviewing

#### **Objective 2: Assess why customers do not buy**

- Examine hidden secrets for using value added techniques
- Evaluate how to give a professional sales presentation
- Analyze customized ways to close the presentations which call for action
- Recognize how to keep the door open when the customer says no
- Identify and solve customer buying concerns

#### **Objective 3: Distinguish ways to give customer service through the entire process**

- Choose follow-up plans for keeping customers for life

# 21<sup>st</sup> Century Consulting - 1 Day

**Course Description:** This one-day course is designed to teach core consulting competencies with individuals who are giving customers advice and helping them solve problems. *21st Century Consulting* can be used by internal consultants or external independent consultants. This seminar teaches the approaches for discovering real life solutions that work with consulting. In addition, this course focuses on how to build, keep, and advance the customer relationship while building long-term trust.

## **Course Objectives:**

### **Objective 1: Discuss areas to brainstorm when doing a client project**

- Discuss the differences between internal and external consultants
- Analyze interview skills that will give insights into any project
- Practice setting project objectives that are measurable and realistic
- Discuss collecting data and information
- Evaluate how to analyze a problem
- Analyze the best skills and personnel needed to successfully fulfill this project
- Evaluate ways to create a project plan, set expectations, and monitor progress

### **Objective 2: Analyze the process of conducting a gap analysis**

- Discuss the steps to a force field analysis
- Examine techniques for problem solving

### **Objective 3: Evaluate best practices of coaching and mentoring the client**

- Identify ways to discuss strategic changes that will help the client
- Evaluate roadblocks to strategic change
- Analyze best approaches in creating a transition team for implementation
- Create a code of conduct for assisting the team in acting professional
- Examine options in presenting the results to the customer
- Discuss proposal design and documentation

### **Objective 4: Analyze feedback systems which assist the consulting relationships**

- Develop project planning techniques for running the consulting project
- Analyze approaches for conducting a close out session on a project
- Discuss the benefits of a Post Mortem and how to conduct one

# Creating Superior Customer Value - 1 Day

**Course Description:** This one-day course will focus on how to create value for your customer base whether you are in the product or service industry. This seminar concentrates on the practical way of searching out the areas that affect customers the most in meeting and exceeding expectations. Special attention is given in examining ways to be customer focused and detailing the process for shifting your organization to a more value orientation. Issues such as quality, price, customer service, follow-up, and customer bonding and retention are all included.

## **Course Objectives:**

### **Objective 1: Define customer value**

- Define true value from the customer's point of view
- Compare customer value focus to traditional marketing
- Examine the total worth of a customer

### **Objective 2: Appraise ways of overcoming barriers to marketing segments**

- Identify a unique value proposition
- Create a targeted focus on values
- Analyze a value focused sales strategy
- Evaluate value strengths through marketing
- Examine how customer service reinforces value
- Formulate pricing strategies for different target markets
- Identify pricing methods
- Compare how buyers evaluate cost

### **Objective 3: Analyze ways to differentiate yourself from the competition**

- Develop a method for retaining customers long term
- Formulate a cycle for building relationships with customers
- Design an action plan for moving customer value to the forefront

# **Delivering Customership – 2 Day**

## ***How to Deliver and Exceed Customer Service Expectations***

**Course Description:** This two-day course will examine the customer service process. It will teach each participant ways to impact the customer with higher quality service. This course will focus on shifting the customer from complainer to word-of-mouth advertiser. Participants will learn how to handle agitated customers in a quality manner and how to reduce potential problems. They will learn techniques that communicate a caring attitude, as well as change customers' perceptions of the service they are receiving. This course will present best practices in customer service companies.

### ***Course Objectives:***

#### **Objective 1: Define customer service**

- Evaluate current hindrances facing organizations
- Discuss creating a culture which reinforces customer service
- Examine why every company should be concerned about customer service
- Compare customer expectations to customer deliverables
- Collect customer expectations
- Analyze the benefits of customership
- Discuss customer buying habits

#### **Objective 2: Develop solutions to stop customer complaints**

- Compare techniques for getting customers to agree with you
- Define ways to build credibility with customers
- Discuss differences between claims, benefits and features

#### **Objective 3: Evaluate how to communicate with customers**

- Identify how to bond with customers
- Analyze steps to help customers give more information
- Predict distinct connections every customer must receive
- Choose human factors which mislead communication
- Judge unspoken signals which distort communication
- List way of putting active listening to work
- Compare ways for handling problem customers
- Design methods for calming down irate customers

*(Continued on next page)*



## **Objective 4: Formulate checkpoints to verify**

### **integration of customer service**

- Identify feedback systems that work
- Design culture for superior customer value
- Compose criteria for customer value points
- Create customer value points
- Define qualities of a customer service superstar
- Label warning signals that customer service is dying
- Develop five ways of turning your customer service into the leader of the pack

- Compare items for adding value to the customer
- Identify price influencers for the customer
- Discuss price and how it affects the customer buying behavior
- Create a system for retaining customers long term

## **Objective 5: Discuss future of partnering and how to move customers into this relationship**

- Create action plan for establishing partner relationships

# Delivering Superior Customer Service - 1 Day

## *How to Surpass Customer Expectations*

**Course Description:** This one-day course is designed to teach the skills needed to impact customers with higher quality service. This course will focus on the behavioral side of customer service. Participants will learn how to handle agitated customers in a quality manner and reduce potential problems. Participants will learn techniques that communicate a caring attitude, as well as change the customer's perception of the service being received.

### **Course Objectives:**

#### **Objective 1: Define customer service**

- Review current hindrances facing organizations
- Analyze why every company should be concerned about customer service
- Compare customer expectations to customer deliverables
- Evaluate customer expectations

#### **Objective 2: Evaluate how to communicate with customers**

- Identify how to build credibility with customers
- Assess how to bond with customers
- Identify ways of persuading customers to provide more information
- Choose distinct connections every customer must receive
- Rate human factors which mislead communication
- Recognize unspoken signals which distort communication
- Explain how to put active listening to work
- Examine top customer complaints
- Apply ways for handling problem customers
- Review methods for calming down irate customers
- Discuss feedback systems that work
- Evaluate warning signals that customer service is dying

# **Retaining Customers for Life - 1 Day**

## ***The Art of Keeping Customers Through Retention***

**Course Description:** This one-day course will teach participants skills for bonding with their customers and creating strategies for staying involved with them. This seminar will touch on customer acquisition, customer value, and customer service as some of the foundational processes which must be high functioning. This course also includes creative ways to keep communication open and be in touch with each customer.

### **Course Objectives:**

#### **Objective 1: Analyze the effectiveness of processes each customer will be exposed to when buying**

- Examine policies and procedures which need adjusting
- Analyze the impact retaining customers will have on your bottom line
- Identify the total revenue the average customer spends with our organization
- Analyze the savings if we keep an additional 10% of our customers
- Construct the present sales cycle your customers follow to do business with you
- Formulate a description of the perfect customer or target prospect
- Analyze the core competencies your sales team needs for acquiring the customer

#### **Objective 2: Discuss reasons customers stop doing business with organizations**

- Discuss ways we lose our customers
- Analyze what your competition does to retain their customer base
- Identify your unique value proposition and why customers do business with you
- Discuss why there is more focus on acquiring the customer rather than keeping the customer
- Develop a list of ways to reconnect with your past customers

#### **Objective 3: Compare communication systems that work well while involving your customers**

- Formulate a strategy to build relationships with your customers continually
- Define breakdowns with the internal communication between departments or divisions
- Create a customer reward program

# Serving Internal Customers Through Outstanding Customer Service - 1 Day

## *How to Deliver and Exceed Internal Customer Service Expectations*

**Course Description:** This one-day course will examine the internal customer service process. Each participant will be taught ways to impact the internal customer with higher quality service. This course will focus on why one should deliver outstanding internal customer service and how it makes the organization run more effectively. Participants will learn how to determine who is in their customer service chain, and how to handle abusive techniques from others who are angry and intimidating.

### **Course Objectives:**

#### **Objective 1: Define customer service**

- Compare internal and external customer service
- Discuss exceptional internal customer service
- Discuss the internal organizational culture
- Compare good and bad attitudes which impact internal customer service
- Discuss the internal customer service chain
- Create an internal customer service process/ interaction chain
- Assess how to understand and manage customer expectations
- Discuss how stereotyping hurts internal customers service
- Analyze measuring techniques for determining where internal customer service is now
- Discuss how internal customer service influences employee communication

#### **Objective 2: Identify defusing techniques for angry internal customers**

- Discuss why people use abusive and hostile actions
- Create benefits of counter attacking when attacked
- Create benefits of not counter attacking when attacked
- Examine self control techniques
- Create limits for abusive behavior
- Discuss unacceptable behavior
- Create and enforce limits from abusive behavior

#### **Objective 3: Develop an internal customer service baseline**

- Create service standards
- Compare actual performance versus the standard
- Discuss barriers which prevent internal workers from providing fantastic customer service
- Formulate checkpoints to verify integration of customer service

# Ethics in the Workplace - 1 Day

**Course Description:** This one-day course will focus on ways employees can make decisions and evaluate what is right, proper, and just. This course will deal with theory, as well as actions and behaviors that influence ethics in the workplace. Participants will learn how to successfully draw on their own ethics, moral standards, and beliefs, as well as how to respect the ethics of others while following organizational values that have been set.

## **Course Objectives:**

### **Objective 1: Examine values in America**

- Define theories of ethics
- Discuss myths of ethics and values
- Evaluate the internal pressure to cheat
- Label types of ethics
- Compare sources of ethics

### **Objective 2: Show levels of moral development**

- Compare subjective and objective morals
- Analyze solving moral problems
- Discuss bribery
- Review what is our moral duty
- Compare conflict of moral guidelines
- Evaluate employee rights and how that affects ethics
- Apply accountability and ethics
- Examine agents and roles of moral accountability
- Demonstrate moral responsibility within the organization

### **Objective 3: Examine whistle blowing**

- Describe ethics and trust
- Compare ethics and money
- Examine choices when asked to do something unethical

# Conducting Effective Performance Appraisals - 1 Day

**Course Description:** This one-day course will give each participant the skills to increase performance and reduce behavioral concerns through conducting performance appraisals. Techniques on confronting employees and developing an action plan to change behavior are included. The course has numerous examples and hands-on application to make sure participants are walking out with desired core competencies. At the end of the course, the participant will be able to identify coaching methods and understand numerous ways to approach a worker for the purpose of turning them around. The participant will also learn ways to document performance and behaviors which can be used as leverage with the employee and justification for the performance evaluation.

## **Course Objectives:**

### **Objective 1: Analyze reasons for performance evaluation**

- Discuss qualities of good performance evaluation
- Compare old style performance evaluations to modern day
- Evaluate the barriers to documentation
- Discuss what must be documented and how
- Choose and set up the performance evaluation
- Evaluate common performance evaluation mistakes and how to prevent them

### **Objective 2: Classify values for successful coaching**

- Examine four methods of coaching
- Evaluate the steps in the coaching process
- Formulate seven questions to ask yourself during the evaluation process
- Define how to get prepared for a face-to-face
- Examine approaches for handling unsatisfactory performance
- Analyze the different stages of one-on-one coaching and behavioral enhancement
- Assess the characteristics of successful coaching
- Evaluate how to disagree agreeably

### **Objective 3: Discuss types of intrinsic motivation**

- Discuss types of extrinsic motivation

# Conducting Effective Performance Appraisals - 2 Day

**Course Description:** This two-day course will give each participant the skills to increase performance and reduce behavioral concerns through conducting performance appraisals. Techniques on confronting employees and developing an action plan to change behavior are included. This course has numerous examples and hands-on applications to ensure participants are walking out with the desired core competencies. At the end of the course, the participant will be able to identify coaching methods and understand numerous ways to approach a worker for the purpose of turning them around. The participant will also learn ways to document performance and behaviors which can be used as leverage with the employee and justification for the performance evaluation.

## **Course Objectives:**

### **Objective 1: Analyze reasons for performance evaluation**

- Discuss qualities of good performance evaluation
- Compare old style performance evaluations to modern day
- Evaluate the barriers to documentation
- Discuss what must be documented and how
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- Examine approaches for handling unsatisfactory performance
- Analyze the different stages of one-on-one coaching and behavioral enhancement
- Assess the characteristics of successful coaching
- Evaluate how to disagree agreeably

### **Objective 3: Discuss types of intrinsic motivation**

- Discuss types of extrinsic motivation

# Balanced Scorecard Fundamentals - 1 Day

**Course Description:** This introductory, one-day course will teach the Balanced Scorecard philosophy developed by Robert Kaplan and David Norton. This seminar will give the fundamentals of the Balanced Scorecard and how to apply it. This seminar will create ways for participants to translate vision and mission into detailed, workable objectives.

## Course Objectives:

### Objective 1: Define balanced scorecard

- Discuss overview of balanced scorecard
- Review benefits of balanced scorecard
- Examine strengths of balanced scorecard
- Analyze limitations of the old style philosophy
- Identify factors impacting its success

### Objective 2: Create a focused strategy

- Develop ways to support an inherited strategy and vision
- Define ways to clarify strategy
- Identify and direct strategic drivers
- Classify preparation techniques in using the balanced scorecard

### Objective 3: Examine different perspectives

- Create the financial perspective
- Create the customer perspective
- Create the learning and growth perspective
- Create the internal process perspective

### Objective 4: Discuss ways to design a customized tool for your area

- Recommend ideas for aligning management to the balance scorecard
- Identify check-ups and reviews
- Identify major resistors to implementing balanced scorecard
- Formulate ways of gaining input and consensus in implementation
- Create an action plan for monitoring



# Comprehensive Team Leadership - 1 Day

**Course Description:** This one-day seminar will focus on developing comprehensive skills with each team member, by creating numerous scenarios or problems which affect teams. Participants will take part in group interaction as a heavy component for each segment by exploring how to fix the problem within the culture of the organization. This course will also explore ideas such as how to reproduce team building skills within each person, needs for training others, and how to share information among peers.

## Course Objectives:

### Objective 1: Discuss why teams do not share information

- Review Tuckman's Theory of team development
- Evaluate what happens in each stage
- Create a code of conduct for your team
- Discuss how to confront peers who are not doing their part

### Objective 2: Examine the benefits of facilitation

- Evaluate the core competencies of a facilitator
- Create questions that move a team forward
- Develop new messages with questions
- Assess non-verbal techniques
- Recognize hedge words and what they mean

### Objective 3: Examine team conflict

- Develop creative ways to reduce team conflict
- Identify when to intervene in a problem
- Create a plan for equipping a team with new skills

### Objective 4: Develop a successful meeting

- Create a proper agenda for running successful meetings
- Organize meetings which detail desired outcomes and expectations
- Review how to work with a recorder to guarantee documentation of meetings
- Assemble brainstorming activities
- Create buy-in from cross functional supervisors or managers

### Objective 5: Examine coaching and counseling of team members

- Evaluate planning strategies for effective team leadership
- Formulate a list of characteristics of most successful team leadership skills
- Assess how to combine team leadership skills to assist management
- Discuss evaluation procedures in giving feedback on team members
- Predict where team conflict can surface
- Analyze best practices for dealing with conflict
- Examine risk assessment strategies

# The Lost Art of Leadership - 1 Day

**Course Description:** Tired of working with leaders who have no vision and are lying down on the job? This one-day course will give a step-by-step process for creating leaders who will keep the organization competitive. This course will give three distinct models for leading and creating future leaders throughout the organization.

## **Course Objectives:**

### **Objective 1: Discuss old style leadership**

- Evaluate 21st century leadership styles
- Identify ways leaders kill their organizations
- Describe essential skills and qualities leaders must possess
- Compare leadership with a growth mind set to that of a maintenance mind set
- Predict leadership issues concerning time management
- Evaluate concerns when leadership is an outsider

### **Objective 2: Evaluate the need for leadership's vision**

- Identify creative ways to break away from traditional models
- Identify a leader's influences in strategic planning
- Examine how to align management focus to vision
- Compare ways to lead change at Mach III speed
- Examine communication ideas to use with leaders
- Analyze ways leaders can stay current

### **Objective 3: Discuss on seven reasons for organizational failure**

# Purpose Driven Leadership - 2 Day

**Course Description:** This two-day course is designed to give skills to those in upper management. This program will focus on core skills that can be instantly applied in the upper manager's workplace. This course will focus on practical ways to equip and motivate your workers while coaching them toward a higher degree of competency. *Purpose Driven Leadership* is highly motivational and interactive, and participants will have the flexibility to ask questions and give personal examples. In addition, this course will focus on planning for successful delegation and how to support workers without having to step in and solve all their problems.

## Course Objectives:

### Objective 1: Examine the core competencies of strategic planning

- Analyze the three phases of strategic planning
- Evaluate the impact of mission and vision statements and how to develop one
- Discuss why visions fail
- Identify the need to have a strategy and know where are you going
- Create strategic goals
- Describe how to communicate vision through leadership

### Objective 2: Analyze communication styles

- Discuss individual communication styles
- Identify what type of communication must be communicated downline
- Identify what type of communication must be communicated upline

### Objective 3: Discuss qualities leaders must possess

- Discuss how to demonstrate tough-minded leadership

### Objective 4: Develop qualities of leaders who are change agents

- Analyze when to have a slow approach to change
- Analyze when to have a fast approach to change
- Assess and take a closer look at change
- Classify the many reasons why workers block change
- Develop ways to reduce employee resistance
- Explain how to make changes which support goals
- Analyze secrets to implementing change
- Define ways to create organizational core values
- Discuss strategies for creating trust
- Analyze how to equip and empower
- Develop a strategy for equipping workers with new skills
- Define requirements for being an overcomer
- Analyze two types of motivation
- Evaluate how to hire great employees
- Discuss best practices in disciplining employees and changing behavior
- Define how to track employees

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## **Objective 5: Discuss values of successful coaching**

- Identify options in coaching employees toward success
- Examine the three step process to coaching
- Discuss the attributes of successful coaches
- Identify common coaching mistakes

## **Objective 6: Evaluate the best practices in solving problems**

- Discuss the benefits of problem solving
- Analyze ten ways to expand your possibilities in choosing a solution
- Develop a decision checklist
- Discuss levels of group conflict and how to deal with it professionally
- Evaluate the best way to create a code of conduct that works
- Discuss eight of the most common times for conflict

# Strategic Planning - 1 Day

## *Dreaming a New Dream*

**Course Description:** This one-day course is a road map on ways executives can strategically align each department with the mission and vision of the organization. *Strategic Planning* will focus on creating and implementing plans that reinforce new goals and vision, as well as supporting goals which have been inherited. This course will identify a process with strong emphasis on the behaviors and performance needed to successfully fulfill the plan.

### **Course Objectives:**

#### **Objective 1: Discuss ten benefits of strategic planning**

- Convince others to participate and help design the strategic plan
- Examine why people resist strategic planning
- Analyze the handling and confronting of fear
- Identify communication ideas
- Describe the strategic planning process
- Examine the three phases of strategic planning
- Predict resources needed to fulfill the plan

#### **Objective 2: Formulate phase #1, Creating a Strategy**

- Discuss preparing to plan
- Create a code for the strategic planning meeting
- Identify the three steps in strategic dreaming
- Discuss application of strategic goals
- Analyze the issues of inheriting the strategic plan

#### **Objective 3: Evaluate phase #2, Checking the Strategy**

- Identify four steps to force field analysis
- Compare benefits of force field analysis
- Examine contingency plans and crisis situations
- Discuss rules for contingency planning
- Review questions for high probability planning

#### **Objective 4: Design phase #3, Implementing the Strategy**

- Convince others by kicking off the strategic plan
- Show seven keys to strategic plan implementation
- Examine five key interferences to implementing the strategic plan
- Evaluate performance gap
- Create an action plan

# Strategic Planning - 2 Day

## *Dreaming a New Dream*

**Course Description:** This two-day course is a road map on ways executives can strategically align each department with the mission and vision of the organization. *Strategic Planning* will focus on creating and implementing plans that reinforce new goals and visions, as well as support goals which have been inherited. This course will identify a process with strong emphasis on the behaviors and performance needed to successfully fulfill the plan. Participants will learn how to break down the plan into bite size steps for faster implementation and delegation.

### **Course Objectives:**

#### **Objective 1: Discuss ten benefits of strategic planning**

- Convince others to participate and help design the strategic plan
- Examine why people resist strategic planning
- Analyze the handling and confronting of fear
- Identify communication ideas
- Describe the strategic planning process
- Examine the three phases of strategic planning
- Predict resources needed to fulfill the plan
- Map and organize strategic goals

#### **Objective 2: Formulate phase #1, Creating a Strategy**

- Discuss preparing to plan
- Create a code for the strategic planning meeting
- Identify the three steps in strategic dreaming
- Discuss application of strategic goals
- Analyze the issues of inheriting the strategic plan

#### **Objective 3: Evaluate phase #2, Checking the Strategy**

- Examine strategic focus, goals, and plan
- Develop a SWOT analysis
- Identify four steps to force field analysis
- Compare benefits of force field analysis
- Examine contingency plans and crisis situations
- Discuss rules for contingency planning
- Review questions for high probability planning

#### **Objective 4: Design phase #3, Implementing the Strategy**

- Convince others by kicking off the strategic plan
- Show seven keys to strategic plan implementation
- Analyze what to do when things go wrong
- Examine five key interferences to implementing the strategic plan
- Analyze alignment of management focus
- Evaluate performance gap
- Create an action plan

# Successfully Handling Change - 1 Day

**Course Description:** This one-day course will examine all the angles of change. Participants will learn approaches people take in handling change and ways to anticipate or forecast changes coming down the line. Each person will gain skills not only in looking at change from the perspective of the organization, but also what he/she can do to help implement that change. Attendees will gain insight into the components of change and will create a strategic plan in how to overcome hurdles due to the fear of change.

## **Course Objectives:**

### **Objective 1: Discuss the definition of change**

- Identify proactive and reactive characteristics
- Analyze why people resist change
- Evaluate four types of change
- Examine five roles of change agents
- Explain the drivers of change
- Classify the roadblocks to change
- Evaluate when to create change quickly or gradually
- Formulate a checklist to help determine resistance
- Identify how to deal with setbacks
- Assess five new focuses from change

### **Objective 2: Predict three areas that impact change on people**

- Examine six ways fear hinders change
- Evaluate seven qualities of a paralyzed state
- Identify eight factors that determine a person's viewpoint
- Compare four ways people respond to change

### **Objective 3: Create a strategy for change**

- Perform a force field analysis
- Create an action plan

# Tough Minded Leadership - 1 Day

**Course Description:** This one-day course will teach leaders how to have a soft heart and tough skin. This course will focus on how to stop being a gutless, nice person who gets taken advantage of often. Participants will learn techniques that allow one to confront, hold others accountable, and lead in a tough way while maintaining the personal approach.

## **Course Objectives:**

### **Objective 1: Discuss leadership and its impact on the corporate team**

- Evaluate how to make tough decisions
- Discuss reshaping and driving the organization for higher results
- Develop best practices of outstanding leaders
- Analyze how to confront and prevent organizational conflict
- Formulate balanced and fair core competencies
- Identify how to confront the status quo

### **Objective 2: Review the importance of leaders and their relationships with employees**

- Evaluate the importance of leaders communicating direction, vision, and mission
- Analyze how to break down the silo effect of the organization
- Discuss ways to stay positive and upbeat for best results
- Evaluate how to lead by asking questions rather than telling
- Analyze how to develop shared vision
- Discuss the positives and negatives of setting up a culture which allows worker input
- Formulate ways to maintain priorities and keep the main thing the main thing
- Analyze and evaluate the best time to influence others
- List the benefits of staying opened minded for new technologies and developments
- Evaluate how and why we must learn from others
- Identify ways to motivate worker productivity



# What Makes Your Organization Tick - 2 Day

## *Understanding Behavior in Organizations*

**Course Description:** This two-day course will focus on ways executives can analyze, develop, motivate, and lead their specific section in a strategic way. This course will examine culture and what impacts and influences it; morale and motivational issues; and conflict and people issues. Participants will learn how to successfully diagnose the issues in an organization and develop plans for making changes to move the organization in the direction of success. Participants will analyze ways to make their organizations more effective and efficient.

### **Course Objectives:**

#### **Objective 1: Analyze thoughts with an organizational behavior self assessment**

- Examine personal organizational views in self-assessment
- Analyze the incompetence in the organization
- Construct a clear understanding of organizational behavior and its influences
- Identify different views on running an organization
- Discuss organizational culture and what will be most effective
- Analyze the influences on culture
- Examine different qualities of an organization

#### **Objective 2: Examine strengths, weaknesses, and expectations on worker behavior**

- Review constraint red flags to watch
- Examine attitudes and their influences
- Create process for modifying attitudes
- Label values of progressive organizations
- Examine supporting values
- Create and formulate seven levels of values
- Examine communication

- Formulate strategies for formal and informal methods
- Analyze effective feedback systems
- Evaluate communication proximity zones
- Evaluate communication methods
- Examine communication mishaps
- Analyze effectiveness and ineffectiveness in an organization

#### **Objective 3: Define different motivational theories**

- Evaluate fundamentals in using rewards
- Examine intrinsic and extrinsic motivation
- Examine tactics for enriching the work environment
- Discuss excuses given about goals
- Identify different levels of power and how to use it
- Discuss reinforcement that impacts behavior and performance
- Examine halo and horn effects within an organization

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## **Objective 4: Formulate why people don't make decisions**

- Analyze seven questions to help in decision making
- Compare different decision-making strategies

## **Objective 5: Examine the philosophy in confronting and reducing conflict**

- Construct designs for approaching or confronting others
- Examine how conflict ignites and influences

## **Objective 6: Analyze how to equip others for leadership**

- Examine different types of learning
- Compare three levels of organizational learning
- Examine styles of organizational learners
- Apply action plans developed through the course
- Create action plan

# Coaching and Counseling Professionals - 1 Day

## *Ways to Turn Average Employees into Productive Owners*

**Course Description:** This one-day course will give each participant basic skills for increasing performance and reducing behavioral concerns through coaching and counseling. This course will include practical, focused techniques to increase productivity of staff as well as real world advice for changing behaviors. Skills such as equipping, nurturing, and confronting will be examined with numerous examples for application.

### **Course Objectives:**

#### **Objective 1: Discuss definitions of a coach**

- Analyze qualities of a coach
- Examine dinosaur management compared to coaching
- Show the shift from one style of management to coaching
- Create values for successful coaching
- Formulate steps in the coaching process
- Evaluate the seven questions to ask during coaching events
- Discuss getting prepared for a face-to-face
- Identify and confront unsatisfactory performance
- Analyze which behavior or performance to examine first
- Evaluate ten stages of one-on-one coaching
- Choose behaviors to change in one-on-one sessions
- Explain characteristics of successful coaching
- Identify how to disagree agreeably

#### **Objective 2: Formulate types of intrinsic and extrinsic motivation**

- Analyze common coaching mistakes
- Examine coaching along with performance reviews
- Assess when to use policy and procedures
- Evaluate documentation procedures for a coaching session

# Coaching and Counseling Professionals - 2 Day

## *Ways to Turn Average Employees into Productive Owners*

**Course Description:** This two-day course will give each participant the skills to increase performance and reduce behavioral concerns through coaching and counseling. This course will include practical, focused techniques to increase productivity of staff, as well as real world advice for changing behaviors. Skills such as equipping, nurturing, and confronting will be examined with numerous examples for application. Participants will be able to identify the coaching methods and understand numerous ways to approach a person for the purpose of turning around the employee.

### **Course Objectives:**

#### **Objective 1: Discuss definitions of a coach**

- Analyze qualities of a coach
- Examine dinosaur management compared to coaching
- Show the shifting from one style of management to coaching
- Create values for successful coaching
- Participate in four methods of coaching
- Formulate steps in the coaching process
- Evaluate the seven questions to ask during coaching events
- Discuss getting prepared for a face-to-face
- Identify and confront unsatisfactory performance
- Create coaching agenda for first session
- Predict pitfalls when coaching others
- Analyze which behavior or performance to examine first
- Evaluate the success of the coaching program
- Design a sample coaching program customized for individual employees

- Formulate a sample coaching, counseling and mentoring program
- Identify supervisors or managers who coach others
- Analyze which behavior or performance to examine first
- Evaluate ten stages of one-on-one coaching
- Choose behaviors to change in one-on-one sessions
- Explain characteristics of successful coaching
- Identify how to disagree agreeably

#### **Objective 2: Formulate types of intrinsic and extrinsic motivation**

- Analyze common coaching mistakes
- Examine coaching along with performance reviews
- Assess when to use policy and procedures
- Evaluate documentation procedures for a coaching session

## Confronting Direct Reports - 2 Day

**Course Description:** This two-day course will give each participant the skills to confront direct reports while keeping control of the conversation. You will explore numerous behavioral experiences—from basic push backs to strong opposition. Techniques on confronting and developing an action plan to change behavior are included, as well as activities on progressive confrontation which supports policy/procedures and contracts. This course has numerous examples and hands-on cases to ensure participants are walking out with the desired core competencies. This course supports the Lombardo Core Competencies number 13.

<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Compare old style ways of handling performance issues to modern day</li> <li>• Examine guidelines for when to deal with a problem and when to leave it alone</li> <li>• Examine methods of confronting</li> <li>• Evaluate the steps in the coaching process</li> <li>• Formulate 7 questions to ask yourself during the evaluation process</li> <li>• Analyze approaches for handling unsatisfactory performance</li> <li>• Formulate standards for jobs and how to make sure they are realistic and understood</li> <li>• Discuss how to handle gaps between performance and standards</li> </ul>	<p><b><i>Deals with problem direct reports firmly and in a timely manner</i></b></p>
<ul style="list-style-type: none"> <li>• Analyze and set up the performance discussions</li> <li>• Classify values for successful coaching</li> <li>• Analyze the different stages of one-on-one coaching and behavioral enhancement</li> <li>• Discuss approaches to solve problems</li> <li>• Describe techniques for tracking performance</li> <li>• Evaluate how to use improvement plans for best results</li> </ul>	<p><b><i>Regularly reviews performance and holds timely discussions</i></b></p>

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<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Discuss how to prepare for face to face discussion</li> <li>• Discuss how to fight internal fear which paralyzes us</li> <li>• Examine what is the real world standard of performance</li> </ul>	<p><b><i>Doesn't allow problems to fester</i></b></p>
<ul style="list-style-type: none"> <li>• Discuss why people will not make a decision</li> <li>• Evaluate common mistakes in dealing with direct reports</li> <li>• Discuss the need to understand all policy, procures, and union contracts before dealing with performance issues</li> <li>• Examine techniques in handling the hard, negative decisions as a last resort</li> <li>• Discuss who else should be involved</li> <li>• Analyze how to detect a confrontation is escalating into violence</li> </ul>	<p><b><i>Can make negative decision when all other efforts fail</i></b></p>
<ul style="list-style-type: none"> <li>• Examine the strengths and weaknesses of progressive confrontation</li> <li>• Discuss what are the next steps and document all information</li> </ul>	<p><b><i>Deals effectively with troublemakers</i></b></p>

## Directing Others - 2 Day

**Course Description:** *Directing Others* is a two-day course filled with behavioral skills that will help motivate, educate, and equip others. This course will discuss positive ways to bring out the best in people and specific planning techniques which will assist in a stronger schedule of work. There are numerous interactive activities and cases within this course to allow participants to interject real life situations. Attendees will leave with tricks of the trade that can only be learned from years of experience. This course aligns with the Lombardo Core Competencies number 20.

<b><i>Course Objectives</i></b>	<b><i>Lombardo Core Competencies</i></b>
<ul style="list-style-type: none"> <li>• Define what workers produce daily, hourly, or by shift</li> <li>• Analyze job responsibilities</li> <li>• Discuss priority checklist</li> <li>• Assess modern day managing myths</li> <li>• Evaluate where are you going</li> <li>• Explain tough-minded leadership</li> <li>• Contrast different change strategies</li> <li>• Classify why people block change</li> <li>• Identify secrets to implementing change</li> <li>• Choose ways to reduce employee resistance</li> </ul>	<p><b><i>Good at establishing clear directions</i></b></p>
<ul style="list-style-type: none"> <li>• Examine qualities supervisors must possess</li> <li>• Evaluate how to coach employees toward success</li> <li>• Prepare workers with new skills</li> <li>• Develop core values</li> <li>• Examine strategies for creating trust</li> <li>• Evaluate an empowerment success list</li> <li>• Define ways to equip and empower</li> <li>• Describe requirements for being an overcomer</li> <li>• Discuss how to delegate so as to stretch individuals in a positive manner</li> </ul>	<p><b><i>Sets stretching objectives</i></b></p>
<ul style="list-style-type: none"> <li>• Discuss balancing techniques for workers and how to maintain that balance</li> <li>• Define core competencies needed for each job being accomplished</li> <li>• Evaluate ways to protect workers from taking on too much work compared to others</li> <li>• Discuss approaches for those who are slacking off on their work</li> </ul>	<p><b><i>Distributes the workload appropriately</i></b></p>

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<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Examine planning and scheduling techniques</li> <li>• Identify how to track employees</li> <li>• Discuss planning models and options for scheduling work</li> <li>• Analyze what is the best methods for measuring work</li> </ul>	<p><i>Lays out work in a well planned and organized manner</i></p>
<ul style="list-style-type: none"> <li>• Create a communication plan for discussing and transferring correct information</li> <li>• Discuss how to communicate and how to distinguish the important items</li> </ul>	<p><i>Maintains two way dialogue with others on work and results</i></p>
<ul style="list-style-type: none"> <li>• Analyze the strengths and weaknesses of yourself and others</li> <li>• Analyze two types of motivation</li> <li>• Examine ways to align motivational techniques to workers</li> <li>• Discuss values of successful coaching</li> <li>• Examine the 3 step process to coaching</li> <li>• Recall attributes of successful coaches</li> <li>• Analyze common coaching mistakes</li> <li>• Discuss the needs of sharing credit for a job well done</li> <li>• Discuss the best and worst types of supervision or management you have seen</li> <li>• Analyze which skills can be transposed from the best and worst types of supervision or management</li> </ul>	<p><i>Brings out the best in people</i></p>
<ul style="list-style-type: none"> <li>• Describe how to give clear information</li> <li>• Discuss how to discover if communication is unclear</li> <li>• Examine ways to better communicate</li> </ul>	<p><i>Is a clear communicator</i></p>



## Driven for Results - 2 Day

**Course Description:** This two-day course will focus on developing strategies for analysis and pinpointing ways to impact performance and increase the results of each employee in a positive way. Participants will learn techniques for benchmarking performance and establishing a gap between desired and preferred performance. Attendees will explore how to attain a higher level of productivity in a shorter period of time. In addition, this course supports Lombardo Core Competency number 53.

<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Discuss advantages of performance management</li> <li>• Identify performance needs</li> <li>• Compare performance to organizational directives</li> <li>• Analyze ways to communicate performance expectations</li> <li>• Define ways in discovering the performance gap</li> <li>• Examine how to break down the performance into understandable steps</li> <li>• Define how to map the performance map</li> </ul>	<p><i>Can be counted on to exceed goals successfully</i></p>
<ul style="list-style-type: none"> <li>• Examine best practices of setting goals for individuals as well as teams</li> <li>• Discuss training and the performance gap</li> <li>• Review monitoring of performance indicators</li> <li>• Show how to link operational goals to performance</li> <li>• Examine ways to produce results</li> <li>• Discuss strengths and weaknesses of working outside the country</li> <li>• Review an Earned Value Analysis activity</li> <li>• Examine balanced score cards and their usage in the workplace</li> </ul>	<p><i>Very bottom line oriented</i></p>
<ul style="list-style-type: none"> <li>• Manage a session on coaching performance toward the goal</li> <li>• Analyze mentoring roles in advancing performance</li> </ul>	<p><i>Is constantly and consistently one of the top performers</i></p>

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<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Classify benchmarking techniques of present performance</li> <li>• Examine the impact of incorporating best practices</li> <li>• Evaluate how to create a performance results matrix</li> <li>• Recommend a performance development plan to transition workers toward peak performance</li> <li>• Examine how to build internal talent resources</li> <li>• Discuss the benefits of results oriented programs such as Six Sigma, Project Management, and Quality Improvement.</li> <li>• Discuss best practices for transferring the knowledge from one worker to others</li> </ul>	<p style="text-align: center;"><i>Steadfastly pushes self and others for results</i></p>

# Empower or Perish - 1 Day

**Course Description:** This one-day course will give practical techniques on how supervisors and managers can free up time and motivate staff through empowerment. It will focus on building responsibility and accountability by teaching workers how to make decisions and solve problems. Participants will analyze components for shifting the decision making from management to workers.

## **Course Objectives:**

### **Objective 1: Compare the organization's present culture to new, empowered style**

- Identify how to match skilled employees to assignments
- Analyze why empowerment fails
- Examine present challenges of empowering workers
- Analyze why management might block empowerment and what to do about it

### **Objective 2: Evaluate how far supervisors and managers should go in empowering workers**

- Identify ways to create trust between employees and management
- Evaluate seven steps of effective empowerment
- Choose plans for training government employees for greater empowerment effectiveness
- Examine coaching skills to reinforce empowerment in the organization's culture
- Analyze the most effective process for implementing empowerment

## Motivating Others - 2 Day

**Course Description:** *Motivating Others* is a two-day course that will focus on ways of motivating and leading all generations of workers. This course will discuss motivation plans and how to create them. Several motivational models will be presented, as well as motivational authors who have accomplished ground breaking impact into motivation both personally and professionally. This course will also examine motivation of different cultures and what affects or influences it. This course supports the Lombardo Core Competency number 36.

<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Discuss misconceptions about motivation</li> <li>• Analyze thoughts with an organizational behavior self assessment</li> <li>• Compare Generation X and Y with Baby Boomers</li> <li>• Identify different levels of power and how to use it</li> <li>• Discuss reinforcement that impacts behavior and performance</li> <li>• Examine halo and horn effects within an organization</li> </ul>	<p style="text-align: center;"><b><i>Create a climate in which people want to do their best</i></b></p>
<ul style="list-style-type: none"> <li>• Compare the difference between motivating teams and individuals</li> <li>• Identify different motivational models one can use with direct reports</li> <li>• Define different motivational methods</li> <li>• Discuss fundamentals in using rewards</li> <li>• Examine intrinsic and extrinsic motivation</li> <li>• Formulate tactics for enriching the work environment</li> <li>• Discuss what motivates us personally and professionally</li> <li>• Examine the way motivation can be used in teams and projects</li> </ul>	<p style="text-align: center;"><b><i>Learn how to motivate direct reports, project members, or teams</i></b></p>
<ul style="list-style-type: none"> <li>• Discuss the myths of different generations</li> <li>• Review common management mistakes with Generation X, Generation Y and Baby Boomers</li> <li>• Discuss motivational differences between the generations</li> </ul>	<p style="text-align: center;"><b><i>Assess each person's hot button and get the best out of them</i></b></p>

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<i>Course Objectives</i>	<i>Lombardo Core Competencies</i>
<ul style="list-style-type: none"> <li>• Develop proper delegation techniques</li> <li>• Examine monitoring techniques</li> <li>• Discuss how to create a shift from management making the decision to the worker making the decision</li> </ul>	<p><i>Delegates tasks to lower levels for decisions</i></p>
<ul style="list-style-type: none"> <li>• Discuss excuses given for goal setting</li> <li>• Develop a coaching and mentoring program for all workers</li> <li>• Examine empowerment strengths and weaknesses</li> <li>• Discuss the techniques which violate empowerment</li> </ul>	<p><i>Empowers others</i></p>
<ul style="list-style-type: none"> <li>• Examine proper ways to ask for input</li> <li>• Distinguish reasons why workers might be hesitant to give input</li> <li>• Discuss how to reduce worker reluctance</li> </ul>	<p><i>Invites input from each person and shares ownership and visibility</i></p>
<ul style="list-style-type: none"> <li>• Review how to make people feel important</li> <li>• Discuss what violates this environment</li> <li>• Examine conversations which help and hurt</li> </ul>	<p><i>Makes each individual feel his/her work is important</i></p>
<ul style="list-style-type: none"> <li>• Discuss how to inspire your workers</li> <li>• Examine basic values that assist in inspiring</li> <li>• Discuss the benefits of confidentiality and how it inspires others</li> </ul>	<p><i>Is someone people like working for and with</i></p>

# **Performance Management - 1 Day**

## ***The Art of Getting Maximum Performance from Every Worker***

**Course Description:** This one-day course will focus on developing strategies for analysis and pinpointing ways to impact the performance of employees in a positive manner. Participants will learn techniques for benchmarking performance and establishing a gap between desired performance and preferred performance. In addition, participants will explore how to attain a higher level of productivity in a shorter period of time.

### **Course Objectives:**

#### **Objective 1: Discuss advantages of performance management**

- Identify performance needs
- Assess performance to organizational directives
- Analyze ways to communicate performance expectations

#### **Objective 2: Define ways in discovering the performance gap**

- Classify benchmarking techniques of present performance
- Discuss training and the performance gap
- Examine questions to ask in determining performance

#### **Objective 3: Develop how to break down the performance into understandable steps**

- Define how to map the performance map
- Review monitoring of performance indicators
- Show how to link operational goals to performance
- Manage a session on coaching performance toward the goal

#### **Objective 4: Analyze mentoring roles in advancing performance**

- Examine the impact of incorporating best practices
- Evaluate how to create a performance results matrix
- Develop a performance development plan to transition workers toward peak performance

# Successfully Managing People in the 21<sup>st</sup> Century - 1 Day

**Course Description:** *Successfully Managing People* is a one-day course designed to give skills to those in supervision or management. The program is filled with behavioral skills that will help motivate, equip, and discipline the worker. Interactive pieces are placed within this course to allow the learner to interject real life situations. Those in attendance will leave with tricks of the trade that can only be learned after years of experience.

## **Course Objectives:**

### **Objective 1: Define what workers produce daily, hourly, or by shift**

- Discuss priority checklist
- Assess modern day managing myths

### **Objective 2: Evaluate how to coach employees toward success**

- Discuss values of successful coaching
- Examine the three step process to coaching
- Analyze common coaching mistakes
- Prepare workers with new skills
- Identify vision through leadership
- Examine why visions fail
- Evaluate where you are going

### **Objective 3: Contrast different change strategies**

- Classify why people block change
- Choose ways to reduce employee resistance
- Identify secrets to implementing change
- Examine strategies for creating trust

### **Objective 4: Define ways to equip and empower**

- Describe requirements for being an overcomer
- Analyze two types of motivation
- Examine ways to align motivational techniques to workers
- Evaluate how to hire great employees
- Analyze the disciplining of employees and ways for changing behavior
- Identify how to track employees

# Successfully Managing People in the 21<sup>st</sup> Century - 2 Day

**Course Description:** *Successfully Managing People* is a two-day course designed to give skills to those in supervision or management. The program is filled with behavioral skills that will help motivate, equip, and discipline the worker. Interactive pieces are placed within this course to allow the learner to interject real life situations. Those in attendance will leave with tricks of the trade that can only be learned from years of experience.

## **Course Objectives:**

### **Objective 1: Define what workers produce daily, hourly, or by shift**

- Analyze job responsibilities
- Discuss priority checklist
- Assess modern day managing myths
- Choose qualities managers must possess
- Develop core values

### **Objective 2: Evaluate how to coach employees toward success**

- Discuss values of successful coaching
- Examine the three step process to coaching
- Recall attributes of successful coaches
- Analyze common coaching mistakes
- Prepare workers with new skills
- Develop a Mission Statement and Vision
- Identify vision through leadership
- Examine why visions fail
- Evaluate where you are going
- Explain tough-minded leadership

### **Objective 3: Contrast different change strategies**

- Classify why people block change
- Choose ways to reduce employee resistance
- Evaluate changes which support goals
- Identify secrets to implementing change
- Examine strategies for creating trust

### **Objective 4: Define ways to equip and empower**

- Evaluate an empowerment success list
- Describe requirements for being an overcomer
- Analyze two types of motivation
- Examine ways to align motivational techniques to workers
- Evaluate how to hire great employees
- Analyze the disciplining of employees and ways for changing behavior
- Identify how to track employees



# Successfully Managing People in the Technical Industry - 2 Day

**Course Description:** This two-day course is designed to give skills to those in supervision or management. The program is filled with behavioral skills that will help motivate, equip, and discipline the worker. Interactive pieces are placed within this course to allow the learner to interject real life situations. Those in attendance will leave with tricks of the trade that can only be learned after years of experience.

## Course Objectives:

### Objective 1: Define barriers technical managers face when managing

- Analyze job responsibilities
- Evaluate communication skills and styles which technical managers must possess
- Analyze hurdles technical managers face in dealing with different divisions
- Assess modern day managing myths in technical management
- List qualities technical managers must possess

### Objective 2: Evaluate how to coach employees toward success

- Prepare technical and non-technical workers with new skills
- Discuss values of successful coaching
- Examine the three step process to coaching
- Recall attributes of successful coaches
- Analyze common coaching mistakes

### Objective 3: Develop a Mission Statement and Vision

- Identify vision through leadership
- Examine why visions fail

- Evaluate where you are going and setting realistic goals
- Explain tough-minded leadership

### Objective 4: Contrast different change strategies

- Classify why people block change
- Choose ways to reduce employee resistance
- Evaluate changes which support goals
- Identify secrets to implementing change
- Develop core values in the technical industry
- Discuss strategies for creating trust

### Objective 5: Evaluate an empowerment success list

- Define ways to equip and empower
- Describe requirements for being an overcomer
- Analyze two types of motivation
- Examine ways to align motivational techniques to workers
- Evaluate how to hire great employees
- Analyze the disciplining of employees and ways for changing behavior
- Identify how to track employees

# Time Management: Controlling Your Time - 1 Day

**Course Description:** This one-day course is designed to help participants learn how to use their time wisely. It will use many proven techniques designed to help the participants assess their time management behaviors and explore ways to better manage their time while eliminating negative patterns such as procrastination and clutter.

## Course Objectives:

### Objective 1: Discuss myths and realities of time management

- Examine excuses for not managing your time
- Define roles and responsibilities which demand time
- Examine how to balance your time to create total human wellness in your life
- Review qualities of time management
- Define guidelines of time management

### Objective 2: Evaluate causes of procrastination

- Compare ways to stop procrastination
- Describe ways of dealing with deadlines
- Organize to set proper deadlines
- Develop goals to help budget your time
- Examine ten commandments of deskmanship
- Evaluate the four D's in managing time more effectively
- Evaluate how to organize yourself

### Objective 3: Choose ways to say “No”

- Explain how to set and establish priorities
- Identify ways to plan your work and learn how to plan
- Create ways to handle the paper work
- Discuss time tips on interruptions and decisiveness
- Discuss time tips in your environment and in travel
- Discuss time tips on the telephone and in meetings
- Formulate time tips on personal habits

# Advanced Sales Skills for the 21<sup>st</sup> Century - 1 Day

**Course Description:** This one-day course is designed for sales professionals who already have foundational sales skills. This course will focus on using those foundational skills in a new way with additional techniques for higher close rates. Students will learn how to build a sales model full of return sales and repeat business, examine the psychology of selling, and ways to increase your own personal magnetism. This course will focus on behavior and performance skills that will make positive changes and create higher results.

## **Course Objectives:**

### **Objective 1: Examine the sales process of the normal transaction**

- Compare traditional sales process with advanced model of sales
- Analyze how to fill the pipe line for greater sales profits

### **Objective 2: Identify ways to increase customer value to the individual buyer**

- Evaluate closing techniques and ways to make them better
- Examine the seven step process organizational buyers make
- Define five stage selling process
- Explain presentation techniques that assist in moving the customer along
- Evaluate what it takes to be a super star
- Discuss the barriers of selling the invisible

### **Objective 3: Analyze communication techniques of reflective listening**

- Recognize body language and what the customer is really saying
- Analyze ways to ask purpose driven questions for better results
- Identify how to read people like a book

### **Objective 4: Examine negotiation skills that can create a win-win relationship**

- Compare negotiating styles and ways to counter each incident
- Examine marketing secrets that can boost your sales volume
- Create follow-up techniques that get buyers to return

# Marketingology - 2 Day

## *The Art of Attracting New Customers and Markets*

**Course Description:** This two-day course will teach participants techniques for creating and attracting new customers, as well as getting past customers to repurchase. This course will begin with the fundamentals of marketing and go through each of the different media types to create a successful marketing campaign. Participants will discuss pricing, create their unique selling proposition, and examine copy which sells.

### **Course Objectives:**

#### **Objective 1: Analyze the importance of marketing**

- Examine controlling factors of marketing
- Evaluate qualities of a great market
- Discuss the four P's of marketing mix

#### **Objective 2: Identify discounts and special offers**

- Design USP: Unique Selling Proposition
- Review product life cycle
- Classify techniques for repositioning a product or service
- Analyze barriers to product positioning
- Identify guidelines to repositioning a product or service

#### **Objective 3: Analyze the types of buyers**

- Identify types of buying decisions
- Discuss consumer behavior
- Design messages which are emotional
- Examine ways change influences pricing
- Discuss the benefits of headline core competencies
- Analyze benefit statements

#### **Objective 4: Discuss mailing lists and demographics**

- Evaluate the strengths and weaknesses of differentiation
- Examine direct mail
- Discuss good yellow page advertisements, brochures, direct mail, business cards, billboards, internet, and display advertisements

# Negotiate Like a Pro - 1 Day

**Course Description:** This one-day course will teach participants techniques for creating and achieving what they desire in negotiations. This course is designed for normal negotiations which go on between supplier, vendor, and customer. Participants will examine options for creating win-win situations, for handling the hard nose negotiator, and for reducing the possibility of being taken advantage of by opponents. This course is not designed to deal with labor or hostage issues.

## Course Objectives:

### Objective 1: Analyze the benefits of negotiations

- Examine killer mistakes
- Evaluate three ways of bargaining

### Objective 2: Discuss the three views of preparation

- Identify techniques for personal preparation
- Assess preparation techniques to counter your opponent
- Design and arrange the first session
- Review how and why to set parameters

### Objective 3: Classify techniques for handling emotionally charged issues

- Identify standard negotiation funneling practices
- Design questions that benefit your position
- Discuss words to use in the questions for greater impact
- Analyze barriers to overcome during negotiations

### Objective 4: Identify guidelines for examining opponents

- Evaluate research techniques for checking out the opponent
- Examine ways to overcome price objections

### Objective 5: Discuss the benefits of reinforcing price before negotiations

- Analyze standard negotiation strategies
- Identify techniques to use to follow up after the deal is made

# Team Building 101 - 1 Day

## *Team Building Basics*

**Course Description:** This one-day course is a road map on teams and team building functions. This course will identify a process for successful team behaviors and performance and provide a clear understanding of team objectives, guidelines, and strategies. Participants will examine ways for communicating and discussing roles/ideas for team success. Participants will learn the fundamentals of team building and how to incorporate them within the organization.

### **Course Objectives:**

#### **Objective 1: Identify why organizations should have teams**

- Examine what it will take for teams to be successful
- Analyze what it means to work as a team
- Discuss why teams fail
- Evaluate five causes for team conflict
- Evaluate true team commitment
- Discuss qualities of team success
- Evaluate team conflict
- Discuss how to prevent teams from becoming cliques
- Create steps for building consensus
- Discuss behavioral styles in teams
- Define Tuckman's Theory of team development
- Evaluate what happens in each stage

#### **Objective 2: Review five ways to build trust in each team**

- Create a code of conduct for your team
- Assemble a brainstorming session
- Discuss how to use peer pressure effectively

#### **Objective 3: Examine three rules for facilitating discussion**

- Analyze the role of team leader
- Analyze the role of team member
- Analyze the role of scribe or recorder

#### **Objective 4: Examine effective use of teams in organizations**

- Create a team mission, vision, and goals
- Discuss reporting and communicating within the team
- Create a communication plan for upper management

# Advanced Team Building - 2 Day

**Course Description:** This two-day course will refresh the fundamentals of team building and will then build upon it with additional skills. This course will focus on skills used to run teams smoothly and more effectively. Team leaders or perspective team leaders and managers should be part of this course.

## **Course Objectives:**

### **Objective 1: Identify why organizations should have teams**

- Examine what it will take for teams to be successful
- Analyze what it means to work as a team
- Discuss why teams fail
- Evaluate five causes for team conflict
- Evaluate true team commitment
- Discuss qualities of team success
- Define Tuckman's Theory of team development
- Evaluate what happens in each stage

### **Objective 2: Review five ways to build trust in each team**

- Create a code of conduct for your team
- Assemble a brainstorming session
- Discuss how to use peer pressure effectively

### **Objective 3: Evaluate the use of facilitation skills in teams**

- Examine three rules for facilitating discussion
- Analyze the role of team leader
- Examine five ways team leaders impact the team
- Analyze the role of team member
- Analyze the role of scribe or recorder
- Analyze the role of team sponsor

### **Objective 4: Examine effective use of teams in organizations**

- Create a team mission, vision, and goals
- Discuss aligning team vision with organizational strategy
- Discuss reporting and communicating within the team
- Create a communication plan for upper management

### **Objective 5: Discuss diagnosing team conflict**

- Discuss how to prevent teams from becoming cliques
- Discuss behavioral styles in teams
- Examine communication problems upline
- Examine communication problems cross functional

### **Objective 6: Choose the proper team members**

- Analyze skills needed on the team
- Design an agenda that impacts performance and behavior
- Identify the triple constraints of team projects

*(Continued on next page)*

- Demonstrate interviewing techniques that will assist in determining goals or scope of team
- Review red flags to watch

## **Objective 7: Examine how to set, control, and monitor scope of team projects**

- Discuss ways to track team projects
- Evaluate real timelines for team projects
- Discuss implementation of team project plans
- Discuss how to handle delays
- Assess how to speed up teams
- Discuss close down checklists and handoff procedures



# Total Quality in the 21<sup>st</sup> Century - 1 Day

**Course Description:** This one-day course is designed to teach workers skills which are vital for quality in the workplace. This course will focus on team functions, rewards, and communication necessary to drive quality throughout the organization. Participants will learn how to facilitate and implement quality initiatives, monitor collection of data, and explore planning and monitoring quality projects.

## Course Objectives:

### Objective 1: Compare old and new philosophies

- Define quality for today
- Identify a prevention mentality rather than a reactive one
- Evaluate data that must be analyzed

### Objective 2: Set up guidelines for executing continuous quality

- Examine continuous process improvement
- Develop rules for continuous improvement
- Analyze where continuous improvement can help
- Discuss symptoms of quality concerns
- Design a continuous improvement team's concern

### Objective 3: Judge ways to reduce resistance from organizations

- Compare roadblocks to continuous improvement and quality initiative

### Objective 4: Predict characteristics to the cost of quality

- Choose techniques for involving co-workers

### Objective 5: Evaluate Deming's seven deadly diseases

- Discuss Juran's six-step approach to quality

### Objective 6: Identify steps for creating a quality action plan

- Examine implementation of the quality action plan
- Examine ways of monitoring the quality action plan

### Objective 7: Identify the strengths and weaknesses of Gantt charting

- Discuss the strengths and weaknesses of CPM charting

# Business Writing: Putting Your Thoughts on Paper - 1 Day

**Course Description:** This one-day course is designed for those who desire to improve their writing and/or editing skills. Its goal is to enhance the participant's writing skills through lectures, modeling, peer tutoring, and several short written assignments and editing exercises.

## **Course Objectives:**

### **Objective 1: Examine five stages of the composing process**

- Discuss material efficiently and effectively
- Evaluate examples of several writing tasks
- Explain benefits of daily journal writing
- Review grammar and punctuation
- Examine organizing your thoughts
- Discuss organization and structure of business writing

### **Objective 2: Explain rules for writing reports**

- Contrast kinds of letters
- Classify of reports and letters
- Compare common types of reports and letters
- Review five classes of written materials

### **Objective 3: Discuss benefits of brainstorming**

- Develop a paragraph
- Examine benefits of making an outline
- Discuss importance of knowing the reader-writer relationship
- Perform primary and secondary research
- Compare fast fact finding research tools

### **Objective 4: Examine functional writing in business, industry, and government**

- Recognize the three main body parts of effective writing
- Develop a functional writing style

### **Objective 5: List the three purposes of oral presentations**

- Discuss writing oral reports and presentations
- Examine benefits of presenting data visually

### **Objective 6: Solve common writing problems**

- Prepare where to go when you have trouble with grammar and punctuation
- Create a bibliography of self help reference books on business writing

# Project Management Course Descriptions

## PMP® Exam Prep Boot Camp - 4 or 5 Day

*You pass or we pay for the 2<sup>nd</sup> & 3<sup>rd</sup> attempt!*

**Contact Hours - 35**

### PMI's Talent Triangle Breakdown

Technical - 30.25

Leadership - 3.75

Strategic - 1.00

### PMI's Certification Breakdown

PMP/PgMP - 35.00

PMI-ACP - 4.75

PMI-SP - 4.75

PMI-RMP - 6.75

PfMP - 5.00

PMI-PBA - 4.75

**Course Description:** This fast-paced boot camp prepares each participant with all the core competencies to pass the PMP® the first time. We teach you the terms, processes, and skills to pass the course with minimal post course study. Students will also learn methodologies for taking national tests. Choose from the four- or five-day format to best meet the needs of your employees. This course will follow Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**The Mathis Group PMP® Exam Guarantee:** In the unlikely event you do not pass the PMP® exam the first time, The Mathis Group will pay for your second attempt within 30 days. If you do not pass the PMP® exam the second time, we will pay for the third attempt within 30 days. If you do not pass the PMP® exam on your third attempt, The Mathis Group will allow you to return to one of our PMP® Exam Prep Boot Camps at no charge and will pay for future PMP® exams. Remember that PMI®'s eligibility states that you have 3 testing attempts within 12 months. \*Note: The Mathis Group will pay the retake fee amount that is applied to PMI® members. The Mathis Group will not pay for any rescheduling fees assessed by PMI®.

**PMP® Exam Prep Course Content:** The course content focuses on *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - 6<sup>th</sup> Edition*.

### **Examine the process groups:**

Initiating      Planning  
Executing      Monitoring and Controlling  
Closing

### **Examine the knowledge areas:**

Project Integration Management  
Project Scope Management  
Project Schedule Management  
Project Cost Management  
Project Quality Management  
Project Resource Management  
Project Communications Management  
Project Risk Management  
Project Procurement Management  
Project Stakeholder Management

### **What You Receive**

- *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - 6<sup>th</sup> Edition*
- *PMP® Study Guide 9<sup>th</sup> Edition* by Kim Heldman
- Course workbook
- Flash cards
- 30+ in class practice tests
- 60+ Free online simulation tests
- Post-course coaching and mentoring
- Professional and Social Responsibility
- Test-taking strategies and techniques
- Project Management definitions, process charts and formulas
- Practice exams, scenarios and activities

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## Aftercare and Coaching Services

Following the completion of the PMP Exam Prep Boot Camp, each student will be given the opportunity to use The Mathis Group's Aftercare and Coaching Services. In the time between finishing the boot camp and waiting to take the certification exam, we want our students to stay focused and continue to review the information learned in the class. The Aftercare and Coaching Services can be used as much or as little as needed by each individual student. These services are included in the price of the class, and it is our hope that they be used as needed to prepare for the exam.

First, each student will be given access to our online version of the PMP Exam Prep class to use for extra review and clarification. By email, each will receive the course link, a user name, and password. They are encouraged to review the sections they found difficult. They may also take additional practice exams online; there are 28 new exams in the online version.

Second, each student has access to The Mathis Group's staff for any questions or concerns that may arise during the review time. Coaching will be available by phone and/or email until the student has passed the certification exam. It is not uncommon for questions to arise about the exam or its content, and we want to make sure answers are provided.

We suggest the students schedule and take their exams within 30 days of the class (the week following the class is the best time). After taking the exam, we ask that the students call our 800# and report their pass/fail results within 24 hours. If the student fails the exam, we will continue to offer coaching by phone/email and provide guidance in preparing for the second try.

# PMI-ACP® Exam Prep Boot Camp - 3 Day

**Contact Hours - 21**

## PMI's Talent Triangle Breakdown

Technical - 15.75  
Leadership - 5.25

## PMI's Certification Breakdown

PMP/PgMP - 21.00  
PMI-ACP - 21.00  
PMI-SP - 6.00  
PMI-RMP - 6.25  
PfMP - 5.50  
PMI-PBA - 5.25

**Course Description:** This three-day, fast-paced boot camp prepares each participant with all the core competencies to pass the PMI-ACP® the first time. We teach you the terms, processes, and skills to pass the course with minimal post course study. In addition, this course is based upon the PMI®-recommended reference materials on Agile, Scrum, XP, Lean, and other Agile approaches.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**The Mathis Group PMI-ACP® Exam Guarantee:** In the unlikely event, you do not pass the PMI-ACP® exam the first time, The Mathis Group will pay for your second attempt within 30 days. If you do not pass the PMI-ACP® exam the second time, we will pay for the third attempt within 30 days. If you do not pass the PMI-ACP® exam after three attempts, we will refund the balance of the seminar price to you! \*Note: The Mathis Group will pay the retake fee amount that is applied to PMI® members. The Mathis Group will not pay for any rescheduling fees assessed by PMI®.

## **Examine Agile Tools, Skills, and Domains:**

- The Tools and Techniques and Knowledge and Skills areas to pass the exam
- The Tasks of Agile Principles and Mindset
- The Tasks of Value-driven Delivery
- The Tasks of Stakeholder Engagement
- The Tasks of Team Performance
- The Tasks of Adaptive Planning
- The Tasks of Problem Detection and Resolution
- The Tasks of Continuous Improvement

## **What You Receive**

- *PMI-ACP® Exam Prep 2<sup>nd</sup> Edition* by Mike Griffiths  
ISBN# 978-1932735987
- In-Depth Course Workbook
- Flash cards
- Hundreds of practice test questions

## **Examine Agile Methodologies and Processes:**

- The foundation of Agile, the Agile Manifesto and Principles
- Scrum roles, meetings, tools, techniques and artifacts
- XP (eXtreme Programming) roles and practices
- Comparing Scrum and XP roles and practices
- Lean development practices in Agile Project Management
- Agile estimation techniques

- Agile team dynamics, soft skills, negotiation, and coaching
- How Epics and User Stories are created
- Daily stand-ups, information radiators, team spaces, retrospectives, and osmotic communications
- Agile metrics, including velocity, escaped defects
- Comparing adaptive planning and traditional project management
- Value-driven delivery and Value Stream Analysis
- Product backlog grooming
- Problem detection and resolution

# Business Analysis Certification Boot Camp - 3 Day

*PDU*s – 19.5

## PMI's Talent Triangle Breakdown

Technical - 19.50

## PMI's Certification Breakdown

PMP/PgMP - 19.50

PMI-ACP - 19.50

PMI-SP - 19.50

PMI-PBA - 19.50

**Course Description:** This three-day fast paced boot camp prepares each participant to take the State Business Analysis (BA) Certification. This course will focus on Business Analysis skills and tools taken from *A Guide to Business Analysis Body of Knowledge (BABOK® Guide)*. Participants will go through each process and knowledge area of the *BABOK® Guide* to give a thorough understanding of its content. The class will close out with the taking of the State BA Certification.

Students will learn the basic roles of stakeholders and how to gather real requirements, allow requirements gathering to influence the business case, and use communication techniques to strengthen stakeholder relationships throughout the entire project process. This course aligns with *A Guide to Business Analysis Body of Knowledge (BABOK® Guide)*, 2nd edition. Each student will receive a copy of the *BABOK® Guide*, 2nd edition.

**Method of teaching:** *Students will use discussion, cases, group activities, and tests to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Discuss the history of business analysis**

- Analyze how to improve business processes
- Examine the systems development life cycle

### **Objective 2: Identify stakeholders and their roles**

- Define the business analyst role
- Define business analyst competencies

### **Objective 3: List and define *BABOK® Guide's* knowledge areas**

- Define key terms used in business analysis
- Define and detail business analysis planning and monitoring

### **Objective 4: Discuss estimation techniques**

- Examine decision, financial, and risk analysis
- Define and detail business analysis elicitation
- Develop techniques for conducting elicitation

### **Objective 5: Define and detail requirements management and communication**

- Discover techniques for managing requirements traceability
- Define and detail enterprise analysis
- Define business need
- Define business case
- Define and detail requirements analysis

*(Continued on next page)*

- Examine techniques for prioritizing requirements
- Analyze models for requirement analysis
- Define and detail solution assessment and validation
- Discuss validation techniques

# Project Management Fundamentals - 1/2 Day

*PDU*s - 3.5

## PMI's Talent Triangle Breakdown

Technical - 3.00

Leadership - 0.50

## PMI's Certification Breakdown

PMP/PgMP - 3.50

PMI-ACP - 0.50

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** This half-day course will focus on ways to gather requirements from your customer by using detailed questions. Participants will examine change and ways to control it, risk analysis, communication, and ways to disarm and control conflict. In addition, this course uses four case studies to allow participants to instantly apply the principals within an organizational setting. This course will follow Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define the process for gathering requirements**

- Discuss the interview funnel
- Analyze benefits of conducting a requirements interview
- Design interview questions for gaining all requirements

### **Objective 2: Examine the change control process**

- Discuss integrated change control
- Review guidelines for exploring change

### **Objective 3: Define risks and explore solutions**

- Discuss categories of risk

### **Objective 4: Explain the communication plan process**

- Discuss the three types of communication
- Discuss guidelines in creating a communication plan

### **Objective 5: Define conflict and confrontation strategies**

- Discuss the seven stages of intergroup conflict
- Examine eight of the most common times for conflict



# Project Management Fundamentals - 1 Day

## *PDU's - 6.5*

### *PMI's Talent Triangle Breakdown*

Technical - 5.50

Leadership - 1.00

### *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 1.00

PMI-SP - 1.00

PMI-RMP - 1.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This one-day course will focus on ways employees can run projects faster and more effectively. This course will recommend a six-phase process, as well as numerous preventative actions to efficiently speed up a project. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path, and how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts. This course will follow the Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Define the six-step project management process**

- Examine the project's life cycle
- Identify the triple constraints of every project
- Define the project drivers

#### **Objective 2: Discuss five ways to give proper leadership within the culture**

- Design an agenda for the first project team meeting
- Summarize major areas to brainstorm
- Manage brainstorming and planning meetings

#### **Objective 3: Demonstrate interviewing techniques that will assist in determining project specifics**

- Review constraint red flags to watch
- Show how to set, control and monitor project scope

#### **Objective 4: Classify who to place on your project team**

- Create a modified code of conduct for running an empowered team
- Label role descriptions and project responsibilities when you have no position power

#### **Objective 5: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a Work Breakdown Structure
- Discover how to track multiple projects
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Examine characteristics of a milestone
- Analyze strengths and weaknesses of a Gantt chart

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## **Objective 6: Define the critical path**

- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Assess how to crash a project

## **Objective 7: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of the project plan

## **Objective 8: Identify seven things which must be communicated in every project**

- Apply close down checklists and handoff procedures

# Comprehensive Project Management - 2 Day

*PDU's - 13*

## *PMI's Talent Triangle Breakdown*

Technical - 12.00

Leadership - 1.00

## *PMI's Certification Breakdown*

PMP/PgMP - 13.00

PMI-ACP - 1.00

PMI-SP - 1.00

PMI-RMP - 1.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This intensive two-day course will focus on ways employees can run projects faster and more effectively. This course will recommend a six-phase process, as well as numerous preventative actions to efficiently speed up a project. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path, and how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts. This course will follow the Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define the six step project management process**

- Examine the project's life cycle
- Define the project drivers
- Identify the triple constraints of every project

### **Objective 2: Discuss five ways to give proper leadership within culture**

- Classify how to manage the project through influence rather than power
- Design an agenda for the first project team meeting
- Identify a checklist for team meetings

### **Objective 3: Demonstrate interviewing techniques that will assist in determining project specifics**

- Review constraint red flags to watch
- Show how to set, control, and monitor project scope
- Summarize major areas to brainstorm
- Manage brainstorming and planning meetings

### **Objective 4: Classify who to place on your project team**

- Label role descriptions and project responsibilities when you have no position power
- Create a modified code of conduct for running an empowered team

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## **Objective 5: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a Work Breakdown Structure
- Discover how to track multiple projects
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Examine characteristics of a milestone
- Analyze strengths and weaknesses of a Gantt chart

## **Objective 6: Define the critical path**

- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Discuss effects of a late start
- Summarize danger signals for which to watch
- Assess how to crash a project

## **Objective 7: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of project plan

## **Objective 8: Identify seven things which must be communicated in every project**

- Review who should be communicated to
- Evaluate the results of poor communication
- Analyze signs of poor updates
- Describe ways to communicate bad news
- Apply close down checklists and handoff procedures
- Identify phase out of the project
- Perform a postmortem

# Mastering Project Management - 3 Day

***PDU's - 19.5***

***PMI's Talent Triangle Breakdown***

Technical - 18.75

Leadership - 0.75

***PMI's Certification Breakdown***

PMP/PgMP - 19.50

PMI-ACP - 0.75

PMI-SP - 2.25

PMI-RMP - 3.50

PfMP - 0.75

PMI-PBA - 0.75

***Course Description:*** This three-day course will provide an overview of the project management process. It will include applicable hands-on activities and team exercises to reinforce project management core competencies. Participants will learn tools and techniques which will help them run their projects faster and more effectively. This course will follow the Project Management Institute's process groups and knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** *Students will use discussion, cases, and group activities to facilitate the course.*

***Course Objectives:***

**Objective 1: Recognize the process groups and knowledge areas of project management**

- Identify the benefits of project management
- Describe the project manager's role in project management
- Describe project charter
- Distinguishes the scope of a project including scope statement and scope definition
- Explain the work breakdown structure of a project including decomposition, milestones, critical path

**Objective 2: Analyze activity sequencing and various tools: precedence diagramming method, arrow diagramming method, conditional diagramming methods**

- Examine various estimating tools: analogous estimating, parametric estimating, PERT estimating, etc.
- Examine tools for schedule development including critical path method, duration compression, simulation, and critical chain method
- Interpret quality planning and examine tools such as benefit cost analysis, benchmarking, and flow charting
- Examine communication planning

*(Continued on next page)*

- Examine risk management planning and apply a risk management plan
- Analyze tools for risk identification: brainstorming, interviewing, SWOT analysis, Delphi technique, etc.
- Discuss risk monitoring and control

### **Objective 3: Discuss cost estimating and cost budgeting**

- Explain earned value analysis including:
  - Schedule variance
  - Cost variance
  - Cost performance index
  - Schedule performance index
- Define and recognize procurement planning
- Examine contract types: fixed price, cost reimbursable, time and materials, unit price, and target price
- Discuss the solicitation process
- Examine request seller responses, solicitation, and bidder conferences

### **Objective 4: Define and describe the following:**

- Project team
- Characteristics of effective and ineffective teams
- Destructive and supportive roles of team members
- Team motivation
- Team development

### **Objective 5: Evaluate how to perform quality assurance**

- Discuss scope verification, control, and reporting
- Analyze ways to handle scope changes
- Identify scope creep
- Discuss schedule control
- Discuss cost control
- Define performance reporting

### **Objective 6: Summarize ethical considerations**

### **Objective 7: Examine the process of closing a project including contract closure**

# Advanced Skills on Project Interviewing, Risk and Negotiation - 2 Day

*PDU's - 15*

*PMI's Talent Triangle Breakdown*

Technical - 8.00  
Leadership - 7.00

*PMI's Certification Breakdown*

PMP/PgMP - 15.00  
PMI-ACP - 7.00  
PMI-SP - 7.00  
PMI-RMP - 13.75  
PfMP - 7.00  
PMI-PBA - 7.00

**Course Description:** This two-day course will focus on ways to use communication to gather detailed information from the customer, analyze the information, and expedite the outcomes desired by the customer. Participants will understand how to focus a message and incorporate means to gain information using effective communication skills. This course will recommend ways to build stronger communication skills and provide insight to different communication styles. Participants will learn how to examine and measure objectives within cost, schedule, and cultural issues. Risk for this program will be examined as defining the probability of the project. This course will also examine risk identification, risk communication, and risk planning. In addition, this course will examine the strategies of successful negotiation throughout the project's life cycle. Attendees will learn the value of successful negotiation, the negotiation process, and different negotiation models. This course will include examples of negotiation over scope, deadlines, change, and getting the best price from your vendor. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Interviewing Module**

- Develop ways to increase understanding
- Compare kinds of communication
- Discuss what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common
- Discuss how to match your body language and the message
- List characteristics of a poor listener
- Predict obstacles of listening
- Develop techniques for disagreeing
- Discuss caution signs that a disagreement is turning into a conflict
- Create questions which explore the customer's desires and requirements
- Identify ways of asking questions which open up communication
- Examine feedback techniques for clarifying the real message being given from the customer
- Choose which follow-up questions will detail the expressed wishes of the customer

*(Continued on next page)*

- Analyze the interview data and determine true requirements of the customer
- Develop a sequence of questions which encourages customers to give information freely
- Evaluate the best feedback technique to use in mirroring the requirements back to the customer for approval
- Analyze interview skills that will give insight into any project
- Discuss which areas to brainstorm
- Assess how to set project objectives that are measurable and realistic
- Discuss collecting data and information

## **Objective 2: Negotiation Module**

- Define and detail negotiations in projects including interpersonal negotiations and contract negotiations
- Examine the negotiation process
- List and examine negotiation strategies
- Analyze preparation techniques for negotiation
- Examine how to lead the negotiation process
- Discuss how to deal with the other party's negative tactics
- Examine how to align the support of others before, during, and after the negotiation
- Identify communication skills needed for successful negotiation
- Analyze win-win negotiations
- Create strategies for controlling conflict in negotiation
- Discuss negotiating to resolve conflict

- Evaluate how to negotiate with your project team
- Examine negotiation skills for purchasing
- Examine how to use BAFO to your advantage

## **Objective 3: Risk Module**

- Examine how to conduct risk analysis
- Discuss confronting the attitudes on risk
- List techniques for confronting risk
- Examine ranking
- Discuss performance, system, and process risks
- Examine data gathering
- Explain how to evaluate plans
- Examine how to managing risk plans
- Discuss transferring risk
- Examine monitoring risk
- Develop risk teams
- Create a special response team
- Describe risk trade off
- Define the major processes of risk management
- Analyze the process of Plan Risk Management
- Examine the process of Identify Risks
- Discuss the process of Perform Qualitative Risk Analysis
- Discuss the process of Perform Quantitative Risk Analysis
- Examine the process of Plan Risk Response
- Examine the process of Control Risks



# Agile Project Management - 2 Day

## *Succeeding in a Project Filled With Uncertainty and Change*

**PDU's - 13**

### PMI's Talent Triangle Breakdown

Technical - 12.50

Leadership - 0.50

### PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 13.00

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** Agile Project Management officially began in 2001 and has become a popular project management approach. This two-day course will examine the focus of energizing, empowering, and enabling project teams to provide customer value in a strong Agile framework. Participants will examine the value and process to actively involve the customer in delivering features and functionality throughout the duration of the project. This course will explore actions which reinforce the ability to respond to a changing project environment while focusing on delivering high customer value in every project.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Define Agile Project Management and the Agile manifesto**

- Compare why traditional projects struggle and fail
- Discuss criteria on when to use the Agile methodology
- Discuss when and how to use the hybrid approach to utilize traditional Project Management and Agile Project Management
- Identify the success factors of Agile Project Management
- Identify the principles of Agile Project Management
- Compare predictive planning and adaptive planning
- Discuss the rights and roles of the Agile business case

#### **Objective 2: Define user stories, story mapping, Kanban boards, and burn down charts**

- Examine the usage of product vision box and product backlog
- Discuss the characteristics of a time box

#### **Objective 3: Review how to use daily stand up meetings successfully**

- Examine the role and core skills of the project manager in Agile Project Management
- Examine the role of the culture to support the project team in Agile Project Management
- Examine the engaging role of the customer in Agile Project Management
- Discuss customer value in Agile Project Management

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## **Objective 4: Examine strategies of Agile Project Management**

- Examine Agile modeling
- Discuss the characteristics of the cone of uncertainty
- Describe value stream in Agile Project Management

## **Objective 5: Discuss the positives of co-location, information radiators and team space**

- Analyze the planning processes of initiating, iteration, control, and closeout
- Analyze estimating in Agile Project Management such as size, iteration, and releases
- Analyze scheduling in Agile Project Management
- Analyze tracking and communication in Agile Project Management
- Analyze risk and changes in Agile Project Management
- Examine types of contracts that work best with the Agile framework

# Business Analysis: The *BABOK*<sup>®</sup> Way - 2 Day

*PDU*s - 14

## *PMI's Talent Triangle Breakdown*

Technical - 14.00

## *PMI's Certification Breakdown*

PMP/PgMP - 14.00

PMI-PBA - 14.00

**Course Description:** *Business Analysis: The BABOK Way* is a two-day course which will provide foundational skills in business analysis. Students will learn the basic roles of stakeholders and how to gather real requirements from each stakeholder; allow requirements gathering to influence the business case; and use communication techniques to strengthen stakeholder relationships throughout the entire project process. The course aligns with *A Guide to Business Analysis Body of Knowledge (BABOK<sup>®</sup>), 2nd edition*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Discuss the history of business analysis**

- Analyze how business processes may be improved
- Examine the systems development life cycle

#### **Objective 2: Identify stakeholders and their roles**

- Define the business analyst role
- Define business analyst competencies

#### **Objective 3: List and define *BABOK*<sup>®</sup>'s knowledge areas**

- Define key terms used in business analysis
- Define and detail business analysis planning and monitoring

#### **Objective 4: Discuss estimation techniques**

- Examine decision analysis, financial analysis, and risk analysis

- Define and detail business analysis elicitation
- Develop techniques for conducting elicitation

#### **Objective 5: Define and detail requirements management and communication**

- Discover techniques for managing requirements traceability
- Define and detail enterprise analysis
- Define business need
- Define and model approaches including waterfall, vee, agile, rad, legacy, prototype, evolutionary, and spiral
- Define business case
- Define and detail requirements analysis
- Examine techniques for prioritizing requirements
- Analyze models for requirement analysis
- Define and detail solution assessment and validation
- Discuss validation techniques

# Business Analysis Fundamentals - 2 Day

*PDU*s - 14

## PMI's Talent Triangle Breakdown

Technical - 14.00

## PMI's Certification Breakdown

PMP/PgMP - 14.00

PMI-PBA - 14.00

**Course Description:** *Business Analysis Fundamentals* is a two-day course which will provide foundational skills in business analysis. Students will learn the basic roles of stakeholders and how to gather real requirements from each stakeholder; allow requirements gathering to influence the business case; and use communication techniques to strengthen stakeholder relationships throughout the entire project process. The course content was developed using *A Guide to Business Analysis Body of Knowledge (BABOK®)*, 3rd edition (IIBA), *Business Analysis for Practitioners (PMI)*, and other top Business Analysis resources.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Review an overview of business analysis**

- Discuss the history of business analysis
- Show the Business Analysis Overview Process
- List *BABOK®*'s knowledge areas
- Define key terms used in business analysis
- Examine the Business Analysis approach
- Define the business analyst role
- Define business analyst competencies
- Examine the Business Analysis tiers

#### **Objective 2: Create a Business Analysis Plan**

- Examine the Business Analysis Planning Process

#### **Objective 3: Identify stakeholders and their roles**

- List requirements interview questions
- Define active listening

#### **Objective 4: Analyze the Requirements**

- Examine requirements elicitation
- Explain the Feasibility Study
- Examine product and project scope

#### **Objective 5: Uncover and Analyze Needs**

- Compare Needs and Requirements
- Design a Root Cause Analysis
- Create the Business Case
- Manage and Enforce the Scope
- Define the Scope

#### **Objective 6: Define and Manage Requirements**

- Compare Functional and Supplemental requirements
- Examine types of requirements
- Define and detail requirements management
- Review guidelines for writing requirements

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## **Objective 7: Examine Project Life Cycle Models**

- Define and model approaches including waterfall, vee, agile, rad, legacy, prototype, evolutionary, and spiral

## **Objective 8: Create Tools to Use**

- Examine the Zachman Framework for Understanding Organizations
- Summarize Business Drivers

## **Objective 9: Choose the Right Analysis Techniques**

- Analyze models for requirement analysis
- Discuss estimation techniques

## **Objective 10: Validate and Verify Solutions**

- Define and detail solution assessment and validation
- Discuss validation techniques
- Discover techniques for managing requirements traceability

## **Objective 11: Moving from Planning to Implementation**

- Prepare requirements package
- Examine transitioning

## **Objective 12: Examine Communication in Business Analysis**

- Discover the Business Analyst's role
- Examine Business Analysis in an Agile methodology

# Conflict Management - 1 Day

## ***PDU*s - 6.5**

### **PMI's Talent Triangle Breakdown**

Leadership - 6.50

### **PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PMI-RMP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** This one-day course will focus on ways to reduce professional or personal conflict. Participants will gain insight into ways to acquire control of volatile situations and prevent anger from escalating. They will receive clear steps of action for getting to the root of the conflict. Ways to facilitate bad situations, techniques for gaining consensus, and simple confrontation techniques that reduce stress will all be examined.

### ***Course Objectives:***

#### **Objective 1: Define conflict**

- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers
- Discuss the positive side of conflict
- Examine rules for handling anger
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict
- Identify seven stages of group conflict

#### **Objective 2: Review active listening skills**

- Discuss hedge words people use to distort communication
- Choose words to use that help
- Analyze techniques people use to avoid issues

#### **Objective 3: Create action plans for quick resolution**

- Create a code of conduct for controlling a resolution meeting

#### **Objective 4: Examine confrontation techniques**

- Compare ways to confront others while helping them save face
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard
- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

# Creating a Successful Project Business Case - 1 Day

*PDU*s - 6.5

*PMI's Certification Breakdown*

PMP/PgMP - 6.50

*PMI's Talent Triangle Breakdown*

Technical - 6.50

**Course Description:** This intensive one-day course will focus on the business case. Students will learn what a business case is, what it includes, why it is necessary for successful project management, and how to develop one for every project. Students will also learn how to conduct a business case review to ensure the project's success. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Define business case**

- Identify purpose of a business case
- Define and detail project charter
- Define content areas of a business case

**Objective 2: Discuss areas of document objectives, reasons, benefits and benefits realization**

- Discuss areas of timescale, costs and investment appraisal
- Define and detail sensitivity analysis

**Objective 3: Examine the building/creation of a business case**

- Examine methods of developing a business case
- Examine different formats for a business case
- Examine business case templates

**Objective 4: Define business case review**

- Examine questions to ask during a business case review
- Define inputs and outputs from a business case review
- Examine options after a business case review

**Objective 5: Identify levels of responsibility with a business case**

- Analyze a business case example

# Creating a Successful Project Business Case - 2 Day

*PDU's - 13*

## *PMI's Talent Triangle Breakdown*

Technical - 12.75

Strategic - 0.25

## *PMI's Certification Breakdown*

PMP/PgMP - 13.00

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 0.25

PfMP - 0.25

PMI-PBA - 0.25

**Course Description:** This two-day course will focus on the business case. Students will learn what a business case is, what it includes, why it is necessary for successful project management, and how to develop a one for every project. Students will also learn how to conduct a business case review to ensure the project's success. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define business case**

- Identify purpose of a business case
- Define and detail project charter
- Examine the relationship between organizational strategy and the business case
- Define content areas of a business case

- Examine strategies for converting data to monetary values
- Detail five steps to converting data to monetary values
- Define and detail return on investment (ROI)
- Define and detail benefit/cost ratio, payback period, net present value, internal rate of return

### **Objective 2: Discuss areas of document objectives, reasons, benefits and benefits realization**

- Discuss areas of timescale, costs and investment appraisal
- Define and detail sensitivity analysis
- Define estimating concepts and detail four models of estimating
- Define and detail project data collection
- Examine hard and soft data

### **Objective 3: Examine the building/creation of a business case**

- Examine methods of developing a business case
- Examine different formats for a business case
- Examine business case templates

*(Continued on next page)*



## **Objective 4: Define business case review**

- Examine questions to ask during a business case review
- Define inputs and outputs from a business case review
- Examine options after a business case review

## **Objective 5: Identify levels of responsibility with a business case**

- Analyze a business case example

# Creating an Optimistic Project Management Environment - 1 Day

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Leadership - 6.50

## PMI's Certification Breakdown

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PMI-RMP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** In this one-day course participants will examine how having an optimistic environment will impact employee production. They will analyze what causes workplace negativity, examine the impact, and discover how to cultivate optimism. Students will examine how loyalty, trust, and laughter affect the workplace. Students will also discuss how to manage multiple generations.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Analyze the definition of optimism and negativity**

- Compare the traditional and optimistic worker
- Examine the impact of negativity
- Review the common mistakes about optimism
- Describe the cost of negativity

### **Objective 2: Evaluate what causes workplace negativity**

- Examine the benefits of being positive
- Discuss how negativity personally impacts employees

### **Objective 3: Compare the personalities which kill optimism**

- Compare different influences in the workplace
- Examine self-esteem

### **Objective 4: Define emotional intelligence**

- Examine emotional perception, facilitation, understanding, and management
- Summarize the influence of flow

### **Objective 5: Differentiate positive and negative labeling**

- Examine laughter in the workplace
- Examine positive and destructive workplace characteristics
- Review how to cultivate optimism
- Examine the six steps to emotional resilience

### **Objective 6: Discuss how to manage different age groups**

- Review the different generations
- Examine the characteristics of millennials
- Discover how to manage multiple generations

# Creating an Optimistic Work Place - 1 Day

*PDU's - 6.5*

## *PMI's Talent Triangle Breakdown*

Leadership - 6.50

## *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PMI-RMP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** In this one-day course participants will learn ways to turn around negative situations in the workplace. They will outline new strategies to take action quickly, examine why negative situations ripple into every area of the organization, and create approaches which will turn a negative situation into an optimistic workforce.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Analyze the cost of negativity in U.S. organizations**

- Examine the definition of negativity
- Evaluate the challenges of the modern workplace

### **Objective 2: Formulate a five step approach in examining negativity**

- Review the CIA way negativity grows
- Examine the inner/personal dialog
- Identify the family influence

### **Objective 3: Discuss the effect of someone else's negativity on you**

- Assess ways for rebuilding trust
- Discuss situational, habitual, and chronic negativity
- Create stair steps toward negativity

- Compare results of negativity
- Compare ways in dealing with the negaholics

### **Objective 4: Employee rules for confronting negativity**

- Analyze how to break the victim complex
- Define ways to impact negative culture
- Discuss how to fight personal negativity

### **Objective 5: Create an action plan**

# Creating Project Estimates in a Fixed Environment - 1 Day

***PDU***s – 6.5

**PMI's Talent Triangle Breakdown**

Technical - 6.50

**PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** In this one-day course, participants focus on successful ways to estimate project resources and gain skills which allow them to create a realistic project estimate. Organizations struggle with projects due to ineffective estimates. Many people believe there is no need to create an estimate if the budget and schedule are being dictated. This course ensures the ability to detail the estimates by using a variety of estimating techniques and discusses the confidence of those estimates. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Explore the foundation for project estimation**

- Define project estimating
- Discuss roles of individuals who have estimating responsibilities
- Define the life cycle for estimating the project
- Investigate the evolution of project estimates
- Create project estimating metrics
- Explain origins of estimating variances
- Explore the qualities of a good project estimates

**Objective 2: Detail the preparation needed to create realistic estimates**

- List stakeholders to be interviewed
- Examine project history
- Prepare an estimating plan
- Create a project estimating approach
- Discuss perception of level of accuracy
- Explore the purpose for estimates

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## **Objective 3: Evaluate and create estimates for the project**

- Examine the levels of scheduling and estimating
- Create a WBS to assist in estimating
- Analyze the gathering of correct estimating information
- Create a CPM estimating approach
- Discuss who are the estimators
- Create a resource breakdown structure
- Examine the analogous estimating techniques
- Examine the parametric estimating techniques
- Examine the bottom-up techniques
- Discuss the range estimating techniques
- Investigate the need to limit optimism when estimating
- Define how progressive elaboration works
- Analyze the impact of risk on project estimating

## **Objective 4: Explore how to manage project estimates**

- Define the baseline and how it works
- Create a resource plan
- Discuss the estimating management cycle
- Evaluate tools for managing estimates

## **Objective 5: Improve estimating processes**

- Discuss the need to compare beginning estimates to ending estimates
- Create an improvement plan for estimates
- Explore how to audit the estimation process
- Analyze the steps for conducting a lessons learned on the project estimates

# Dealing with Conflict and Negativity in a Project Management Environment - 1 Day

*PDU*s - 7.0

## PMI's Talent Triangle Breakdown

Leadership - 7.00

## PMI's Certification Breakdown

PMP/PgMP - 7.00

PMI-ACP - 7.00

PMI-SP - 7.00

PMI-RMP - 7.00

PfMP - 7.00

PMI-PBA - 7.00

**Course Description:** This one-day course will focus on ways to reduce professional or personal conflict and negativity. Participants will gain insight into ways to acquire control of volatile situations and prevent anger from escalating. They will learn how to turn negative situations around. They will receive clear steps of action for getting to the root of the conflict. Attendees will examine why negative situations ripple into every area of the organization. They will discover ways to facilitate bad situations, techniques for gaining consensus, and simple confrontation techniques that will reduce stress.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define conflict**

- Discuss the positive side of conflict
- Analyze common times for conflict
- Identify reasons for conflict among workers

### **Objective 2: Examine rules for handling anger**

- Choose words to use that help
- Create action plans for quick resolution
- Analyze hostility and how it surfaces
- Examine how to handle hostility
- Compare levels of group conflict
- Examine seven stages of group conflict

### **Objective 3: Review active listening skills**

- Discuss hedge words used to distort communication
- Analyze techniques people use to avoid issues

### **Objective 4: Examine conflict and facilitation strategies**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard
- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

# Dealing with Conflict and Negativity in a Project Management Environment - 2 Day

*PDU*s - 14

## PMI's Talent Triangle Breakdown

Leadership - 14.00

## PMI's Certification Breakdown

PMP/PgMP - 14.00

PMI-ACP - 14.00

PMI-SP - 14.00

PMI-RMP - 14.00

PfMP - 14.00

PMI-PBA - 14.00

**Course Description:** This two-day course will focus on ways to reduce professional or personal conflict and negativity. Participants will gain insight into ways to acquire control of volatile situations and prevent anger from escalating. They will learn how to turn negative situations around. They will receive clear steps of action for getting to the root of the conflict. Attendees will examine why negative situations ripple into every area of the organization. They will discover ways to facilitate bad situations, techniques for gaining consensus, and simple confrontation techniques that will reduce stress. They will create approaches to turn a negative situation into an optimistic workforce.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define conflict**

- Discuss the positive side of conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers

### **Objective 2: Examine rules for handling anger**

- Choose words to use that help
- Create action plans for quick resolution
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict
- Examine seven stages of group conflict

### **Objective 3: Review active listening skills**

- Discuss hedge words people use to distort communication
- Analyze techniques people use to avoid issues

### **Objective 4: Create a code of conduct for controlling a resolution meeting**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard

*(Continued on next page)*

- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

## **Objective 6: Evaluate the inner/personal dialog**

- Identify the family influence
- Assess ways for rebuilding trust
- Create an action plan

## **Objective 5: Examine definition of negativity**

- Analyze the cost of negativity in U.S. organizations
- Evaluate the challenges of the modern workplace
- Formulate a five step approach in examining negativity
- Review the CIA way negativity grows
- Discuss situational, habitual, and chronic negativity
- Discuss the effect of someone else's negativity on you
- Create stair steps toward negativity
- Assess results of negativity
- Compare ways in dealing with the negaholics
- Develop rules for confronting negativity
- Analyze how to break the victim complex
- Define ways to impact negative culture
- Discuss how to fight personal negativity



# Fast Start: Facilitative Workshop for Creating Best Practices for the Project Management Environment - 3 Day

*PDU*s - 19.5

## PMI's Talent Triangle Breakdown

Technical - 6.50  
Leadership - 6.50  
Strategic - 6.50

## PMI's Certification Breakdown

PMP/PgMP - 19.50  
PMI-ACP - 13.00  
PMI-SP - 13.00  
PMI-RMP - 13.00  
PfMP - 13.00  
PMI-PBA - 13.00

**Course Description:** *Fast-Start: Facilitative Workshop for Creating Best Practices for the Project Management Environment* is an on-site, three-day workshop. This is not a training course, but an instructor-led facilitation effort with your staff to create customized Project Management Best Practices for your organization, PMO, or internal Project Center of Excellence.

*Fast Start: Facilitative Workshop* will use your staff to develop project management processes for your organization that are adjusted to your culture, management styles, organizational type and amount of controls desired by upper management. It will allow your organization to have a blueprint of processes to give direction on building and shaping the project management culture and methodology for the future. Each process will not only focus on what your organization is doing now, but also on what you desire it to do in the future. Where do you want your project management methodology to drive your organizational projects?

*Fast Start: Facilitative Workshop* allows your staff to walk away with all major processes for successfully running project in your environment customized to your own culture and organization.

**Method of teaching:** *Instructor-led facilitation. Participants will use flip charts, Post-it notes and group activities to document all processes and methodology.*

## **Course Objectives:**

### **Objective 1: Analyze the PMO model, authority and how it fits into organizational culture**

- Create the Project Best Practices methodology and services
- Discuss the Project Best Practices roles and responsibilities

### **Objective 2: Examine internal processes and methodologies**

- Discuss various environments in which project management can be structured
- Examine how internal project management processes will impact organizational change
- Examine how internal project management processes will impact internal culture

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**Objective 3: Describe what you want your customized Project Management Best Practices to do**

- Identify the classification of projects from a basic to large project to determine project rigor
- Discuss what is to be classified an operational work item compared to a project

**Objective 4: Discuss training and mentoring provided by management to shift to the new project**

- Organize Management Best Practices
- Examine core competencies and a team development associated with PM Best Practices
- Create metrics for measuring the Project Management Best Practices effectively
- Discuss evaluation and oversight strategies for the PMO and management
- Discuss the benefits of creating an internal certification

# Mastering the Interview and Gathering of Project Requirements - 2 Day

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 10.75

Leadership - 0.25

Strategic - 2.00

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 13.00

PMI-SP - 13.00

PMI-RMP - 13.00

PfMP - 13.00

PMI-PBA - 13.00

**Course Description:** This two-day course will focus on ways to gather detailed, specific, and quantifiable requirements for the project. This course will teach students how to analyze the information and expedite the desired goals, objectives, and outcomes given by the customer. Participants will understand how to move beyond the gathering of basic or surface level requirements discussed by the customer to those which are detailed and measurable and needed for project success. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

## **Course Objectives:**

### **Objective 1: Explore the requirements gathering process**

- Understand the iterative and incremental development of requirements
- Discuss the evolution of requirements

### **Objective 2: Scope the problem, goals or objectives**

- Define problems the project will remove
- Set the goals the project will achieve
- Define the objectives the project will meet
- Explore how much analysis should be used
- Discuss the advantage and disadvantage of using a structured interview
- Analyze the types of questions needed to gather the right information

### **Objective 3: Understand and document the real problem**

- Explore and define symptoms
- Explore how to conduct a root cause analysis

### **Objective 4: Document the different types of requirements**

- Discuss input and output requirements
- Discuss reliability requirements
- Analyze performance requirements
- Explore safety and environmental requirements
- Define accessibility requirements
- Explore security or training requirements

*(Continued on next page)*

## **Objective 5: Evaluate the process or processes that will be affected**

- Map the present process being followed
- Map the desired process when a project is completed
- Discuss the changes and impact on culture

## **Objective 6: Convert project objectives to scope deliverables**

- Discuss the outcomes
- Explore the metrics to be measured

## **Objective 7: Detail functional requirements**

- Define functional requirements
- Discuss organizational capabilities the system will support
- Explore behaviors or operations in which the system will act or respond

## **Objective 8: Detail non-functional requirements**

- Define non-functional requirements
- Discuss how non-functional requirements are similar to constraints
- Explore how non-functional requirements stipulate a physical or performance characteristic

## **Objective 9: Detail conditional requirements**

- Define when to use an alternative set of requirements

## **Objective 10: Develop a WBS from the project objectives**

- Create a WBS with work packages
- Estimate cost using work packages
- Detail a WBS

## **Objective 11: Explore requirements associated with quality**

- Find missing requirements
- Prioritize the requirements

## **Objective 12: Communicate project requirements**

- Communicate project requirements to the stakeholders
- Communicate project requirements to the customer
- Communicate project requirements to the team

## **Objective 13: Understand auditing of project requirements**

- Understand internal audits
- Understand external audits

# Microsoft Project 2013 Basics - 1 Day

**PDU's - 6.5**

**PMI's Certification Breakdown**

PMP/PgMP - 6.50

**PMI's Talent Triangle Breakdown**

Technical - 6.50

**Course Description:** This course will focus on helping individuals who use Microsoft Office Project Professional 2013. The course will cover the critical skills necessary to create and modify a project plan file in Microsoft Project. Various skills related to the project plan that will be addressed include creating tasks, managing resources, and organizing resource assignments. By the end of this course, attendees will be able to create a project plan file containing tasks and organize these tasks in a work breakdown structure containing task relationships. They will also be able to create and assign resources and finalize the project to implement the project plan.

**Method of teaching:** Students will use Microsoft Project 2013 Professional to work through example modules and create their own project plan.

**Course Objectives:**

**Objective 1: Examine Microsoft Project, Project Management, and You**

- Discuss the high-level benefits of dedicated project planning and management tools
- Examine the differences between Project Standard and Project Professional
- Examine the major new features introduced in *MS Project 2013 Professional*
- Discuss skills development strategies for mastering projects in the context of a good project management practice

- Examine applying different views to see information presented in different ways
- Examine reports to quickly communicate the status of a project plan

**Objective 3: Starting a new plan**

- Create a new project plan
- Set non-working days in a project plan
- Examine available base calendars and create working-time exceptions in the project calendar
- Examine project properties

**Objective 2: A guided tour of MS Project 2013**

- Review new features with *MS Project 2013 Professional*
- Examine the backstage view to share and manage project files
- Examine the fluent (ribbon) interface and quick access toolbar

*(Continued on next page)*

## Objective 4: Building a task list

- Examine how to add a project summary task
- Examine how to add a recurring task
- Examine how to create milestones in a project plan file
- Examine how to organize tasks into phases
- Examine how to enter task duration estimates
- Examine how to link dependent tasks
- Discuss top-down and bottom-up task planning
- Examine automatic and manually scheduled tasks
- Identify deliverables in a project plan file
- Examine documenting tasks with notes and hyperlinks
- Examine how to set a task deadline

## Objective 5: Setting-up resources

- Examine how to set up resource information for the people who work on projects
- Discuss best practices for entering resource names
- Examine how to enter a resource's maximum capacity
- Examine how to enter resource pay rates
- Examine how to get resource cost information
- Examine how to adjust working time in a resource calendar
- Examine how to set up cost resources
- Examine how to document resources with notes

## Objective 6: Assigning resources to tasks

- Examine how to assign a resource to a task
- Discuss the scheduling formula
- Examine how to control work when adding or removing resource assignments
- Discuss effort-driven scheduling
- Examine how to assign cost resources to tasks
- Examine how to check the plan's duration, cost, and work

## Objective 7: Formatting and Sharing a Project

### Plan

- Examine how to customize the Gantt chart view
- Examine how to customize the timeline view
- Examine how to draw on a Gantt chart
- Examine how to copy views
- Examine how to print views
- Examine how to customize and print project reports

## Objective 8: Tracking project progress

- Examine how to save a project baseline
- Examine how to track a project schedule
- Examine how to enter a task completion percentage
- Examine how to enter actual values for tasks
- Discuss evaluating if a project is on schedule

# Microsoft Project 2013 Intermediate - 1 Day

*PDU*s - 6.5

*PMI's Certification Breakdown*

PMP/PgMP - 6.50

*PMI's Talent Triangle Breakdown*

Technical - 6.50

**Course Description:** This course will build upon the skills learned in the *Microsoft Project 2013 Basic* course. This course will go beyond simply preparing a project plan to looking at the skills needed to use Microsoft Project during the Project Implementation phase. At the end of this course, students will be able to manage straightforward projects through the proper assignment of tasks and resources and be able to track progress and report on a project.

**Method of teaching:** *Students will use Microsoft Project 2013 Professional to work through example modules and create their own project plan.*

## **Course Objectives:**

### **Objective 1: Fine-Tuning Task Scheduling**

- Examine how to set task relationships with task path
- Examine how to adjust task link relationships
- Examine how to set task constraints
- Discuss interrupting work on a task
- Examine how to adjust working time for individual tasks
- Discuss controlling task scheduling with task types
- Discuss assignment units, peak, peak units, and the scheduling formula
- Discuss task types and effort-driven scheduling

### **Objective 2: Fine-Tuning Task Details**

- Examine how to enter deadline dates
- Examine how to enter fixed costs
- Examine how to setup recurring tasks
- Examine how to view the project's critical path
- Examine how to manually schedule summary tasks

### **Objective 3: Fine-Tuning Resource and Assignment**

#### **Details**

- Examine how to setup resource availability to apply at different times
- Examine how to enter multiple pay rates for a resource
- Examine how to setup resource pay rates to apply at different times
- Examine how to setup material resources
- Examine how delay the start of assignments
- Examine how to apply contours to assignments
- Examine how to apply different pay rates to assignments
- Examine how to assign material resources to tasks
- Discuss variable consumption rates for material resources

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- Examine how to view resource capacity
- Examine how to adjust assignments in team planner view

## **Objective 4: Fine-Tuning the Project Plan**

- Examine how to view resource allocations over time
- Discuss evaluating resource allocations
- Examine how to manually resolve resource over allocations
- Examine how to level over allocated resources
- Examine how to check the project's cost
- Examine how to check the project's finish date
- Examine how to inactivate tasks

## **Objective 5: Organizing Project Details**

- Examine how to sort project details
- Examine how to group project details
- Examine how to filter project details
- Examine how to create new tables
- Discuss creating custom fields
- Examine how to create new views

## **Objective 6: Tracking Progress on Tasks and**

### **Assignments**

- Examine how to update a baseline
- Discuss saving interim project plans
- Examine how to track actual and remaining values for tasks and assignments
- Discuss how to manually enter actual costs
- Examine how to track time-phased actual work for tasks and assignments
- Discuss collecting actuals from resources
- Examine how to reschedule incomplete work

## **Objective 7: Viewing and Reporting on Project**

### **Status**

- Examine how to identify tasks that have slipped
- Discuss project variance
- Discuss project communication
- Examine how to review task costs
- Examine how to review resource costs
- Examine how to report project cost variance with a stoplight view

## **Objective 8: Getting Your Project Back on Track**

- Examine how to troubleshoot time and schedule problems
- Examine how to reduce task durations by assigning resource overtime hours
- Examine how to troubleshoot cost and resource problems
- Examine how to troubleshoot scope-of-work problems



# Microsoft Project 2013 Advanced - 1 Day

***PDU***s - 6.5

## **PMI's Talent Triangle Breakdown**

Technical - 6.50

## **PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-RMP - 6.50

**Course Description:** This course will build upon the skills learned in the *Microsoft Project 2013 Intermediate* course. This course will demonstrate advanced features of the application, including emphasis on customization of the application itself. At the end of this course, students will be able to exchange project plan data with other applications, customize elements, automate activities in MS Project with macros and reuse project plan information.

**Method of teaching:** *Students will use Microsoft Project 2013 Professional to work through example modules and create their own project plan.*

### **Course Objectives:**

#### **Objective 1: Applying Advanced Formatting and Printing**

- Examine how to format a Gantt chart view
- Discuss additional Gantt chart formatting features
- Examine how to format a timeline view
- Examine how to format a network diagram view
- Examine how to format a calendar view
- Examine how to print and export views

#### **Objective 2: Applying Advanced Report Formatting**

- Examine how to format tables and charts in a report
- Examine how to create a custom report

#### **Objective 3: Customizing Microsoft Project 2013 Professional**

- Discuss sharing custom elements between plans
- Examine how to record and edit macros
- Examine how to customize the ribbon and quick access bar

#### **Objective 4: Sharing Information with Other Programs**

- Examine how to copy and paste data to other programs
- Examine how to open other file formats in MS Project
- Examine how to save to other file formats from MS Project
- Discuss working with files from previous versions of MS Project
- Examine how to generate visual reports with Excel and Visio

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## Objective 5: Consolidating Projects and Resources

- Examine how to create a resource pool
- Discuss creating a dedicated resource pool
- Examine how to view assignment details in a resource pool
- Examine how to update assignments in a sharer plan
- Examine how to update resource information in a resource pool
- Examine how to update working times in a resource pool
- Examine how to link new plans to a resource pool
- Examine how to change sharer plan assignments and updating a resource pool
- Examine how to consolidate plans
- Examine how to create dependencies between plans

# Microsoft Project 2016 Basics - 1 Day

*PDU*s - 6.5

*PMI's Certification Breakdown*

PMP/PgMP - 6.50

*PMI's Talent Triangle Breakdown*

Technical - 6.50

**Course Description:** This course will focus on helping individuals who use Microsoft Office Project Professional 2016. The course will cover the critical skills necessary to create and modify a project plan file in Microsoft Project. Various skills related to the project plan that will be addressed include creating tasks, managing resources, and organizing resource assignments. By the end of this course, attendees will be able to create a project plan file containing tasks and organize these tasks in a work breakdown structure containing task relationships. They will also be able to create and assign resources and finalize the project to implement the project plan.

**Method of teaching:** *Students will use Microsoft Project 2016 Professional to work through example modules and create their own project plan.*

## **Course Objectives:**

### **Objective 1: Examine Microsoft Project, Project Management, and You**

- Discuss the high-level benefits of a dedicated project planning and management tools
- Examine the differences between Project Standard and Project Professional
- Examine the major new features introduced in the 2016 edition
- Discuss skills development strategy for mastering project in the context of a good project management practice

### **Objective 2: A guided tour of MS Project 2016**

- Review new features with MS Project 2016 Professional
- Examine the Backstage view to share and manage Project files
- Examine the Fluent (Ribbon) interface and Quick Access toolbar

- Examine applying different views to see information presented in different ways
- Examine reports to quickly communicate the status of a project plan

### **Objective 3: Starting a new plan**

- Create a new project plan
- Setting Nonworking days in a Project Plan
- Examine available base calendars and creating working-time exceptions in the project calendar
- Examine project properties

### **Objective 4: Building a task list**

- Examine how to add a Project Summary Task
- Examine how to add a Recurring Task
- Examine how to Create Milestones in a Project Plan file

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- Examine how to Organize Tasks into Phases
- Examine how to enter Task Duration Estimates
- Examine how to link Dependent Tasks
- Discuss Top-Down and Bottom-Up task planning
- Examine Automatic and Manually scheduled tasks
- Identify Deliverables in the Project Plan File
- Examine documenting tasks with Notes and Hyperlinks
- Examine how to set a Task Deadline

## **Objective 5: Examine how to setup resources**

- Examine how to set up resource information for the people who work on projects
- Discuss best practices for entering resource names
- Examine how to enter resources' maximum capacity
- Examine how to enter resource pay rates
- Examine how to get resource cost information
- Examine adjusting working time in a resource calendar
- Examine how to set up cost resources
- Examine how to document resources with notes

## **Objective 6: Examine how to assign resources to tasks**

- Examine how to assign a resource to a task
- Discuss the Scheduling Formula
- Examine how to Control Work when Adding or Removing Resource Assignments
- Discuss Effort-Driven Scheduling
- Examine how to Assign Cost Resources to Tasks
- Examine how to check the plan's duration, cost, and work

## **Objective 7: Examine how to Format and Sharing a Project Plan**

- Examine how to Customize the Gantt Chart view
- Examine how to Customize the Timeline view
- Examine how to Draw on a Gantt Chart
- Examine how to Copy Views
- Examine how to Print Views
- Examine how to Customize and Print Project Reports

# Microsoft Project 2016 Intermediate - 1 Day

**PDU's - 6.5**

**PMI's Certification Breakdown**

PMP/PgMP - 6.50

**PMI's Talent Triangle Breakdown**

Technical - 6.50

**Course Description:** This course will build upon the skills learned in the Microsoft Project 2016 Basic course. This course will go beyond simply preparing a project plan to looking at the skills needed to use Microsoft Project during the Project Implementation phase. At the end of this course, students will be able to manage straightforward projects through the proper assignment of tasks and resources and be able to track progress and report on a project.

**Method of teaching:** Students will use Microsoft Project 2016 Professional to work through example modules and create their own project plan.

**Course Objectives:**

**Objective 1: Examine how to track project progress**

- Examine how to Save a Project Baseline
- Examine how to Track a Project Schedule
- Examine how to Enter a Task Completion Percentage
- Examine how to Enter Actual Values for Tasks
- Discuss Evaluating if a Project is on Schedule

**Objective 2: Examine how to Fine-Tune Task**

**Scheduling**

- Examine how to set task relationships with Task Path
- Examine how to adjust task link relationships
- Examine how to set task constraints
- Discuss interrupting work on a task
- Examine how to adjust working time for individual tasks

- Discuss controlling task scheduling with task types
- Discuss assignment units, peak, peak units, and the scheduling formula
- Discuss task types and effort-driven scheduling

**Objective 3: Examine how to Fine-Tune Task**

**Details**

- Examine how to Enter Deadline Dates
- Examine how to Enter Fixed Costs
- Examine how to Setup Recurring Tasks
- Examine how to View the Projects Critical Path
- Examine how to Schedule Summary Tasks Manually

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## **Objective 4: Examine how to Fine-Tune Resource and Assignment Details**

- Examine how to setup resource availability to apply at different times
- Examine how to enter multiple pay rates for a resource
- Examine how to setup resource pay rates to apply at different times
- Examine how to setup material resources
- Examine how delay the start of assignments
- Examine how to apply contours to assignments
- Examine how to apply different pay rates to assignments
- Examine how to assign material resources to tasks
- Discuss variable consumption rates for material resources
- Examine how to view resource capacity
- Examine how to adjust assignments in team planner view

## **Objective 5: Examine how to Fine-Tune the Project Plan**

- Examine how to view Resource Allocations Over Time
- Discuss Evaluating Resource Allocations
- Examine how to Resolve Resource Overallocations Manually
- Examine how to Level Overallocated Resources
- Examine how to Check the Project's Cost and Finish Date
- Examine how to inactivate tasks

## **Objective 6: Examine how to Organize Project Details**

- Examine how to Sort Project Details
- Examine how to Group Project Details
- Examine how to Filter Project Details
- Examine how to create new tables
- Discuss creating Custom Fields
- Examine how to create new views

## **Objective 7: Examine how to Track Progress on Tasks and Assignments**

- Examine how to Update a Baseline
- Discuss Saving Interim Project Plans
- Examine how to Track Actual and Remaining Values for Tasks and Assignments
- Discuss how to enter actual costs manually
- Examine how to Track Timephased Actual Work for Tasks and Assignments
- Discuss Collecting Actuals from Resources
- Examine how to Reschedule Incomplete Work

# Microsoft Project 2016 Advanced - 1 Day

***PDU's - 6.5***

***PMI's Talent Triangle Breakdown***

Technical - 6.50

***PMI's Certification Breakdown***

PMP/PgMP - 6.50

PMI-RMP - 6.50

***Course Description:*** This course will build upon the skills learned in the Microsoft Project 2016 Intermediate course. This course will demonstrate advanced features of the application, including emphasis on customization of the application itself. At the end of this course, students will be able to exchange project plan data with other applications, customize elements, automate activities in Project with macros and reuse project plan information.

***Method of teaching:*** Students will use Microsoft Project 2016 Professional to work through example modules and create their own project plan.

***Course Objectives:***

**Objective 1: Examine how to View and Report on Project Status**

- Examine how to Identify Tasks That Have Slipped
- Discuss Project Variance
- Discuss Project Communication
- Examine how to Review Task Costs
- Examine how to Review Resource Costs
- Examine how to Report Project Cost Variance with a Stoplight View

**Objective 2: Examine how to Apply Advanced Formatting and Printing**

- Examine how to format a Gantt chart view
- Discuss additional Gantt chart formatting features
- Examine how to format a timeline view
- Examine how to format a network diagram view
- Examine how to format a calendar view
- Examine how to print and export views

**Objective 3: Examine how to Apply Advanced Report Formatting**

- Examine how to format tables in a report
- Examine how to format charts in a report
- Examine how to create a custom report

**Objective 4: Examine how to Customize Microsoft Project**

- Discuss sharing custom elements between plans
- Examine how to records macros
- Examine how to edit macros
- Examine how to customize the ribbon and quick access bar

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## **Objective 5: Examine how to Share Information with Other Programs**

- Examine how to copy and paste data to other programs
- Examine how to open other file formats in Project
- Examine how to save to other file formats from Project
- Discuss working with files from previous versions of Project
- Examine how to generate visual reports with Excel and Visio

## **Objective 6: Examine how to Consolidate Projects and Resources**

- Examine how to create a resource pool
- Discuss creating a dedicated resource pool
- Examine how to view assignment detail in a resource pool
- Examine how to update assignments in a sharer plan
- Examine how to update resource information in a resource pool
- Examine how to update all plans' working times in a resource pool
- Examine how to link new plans to a resource pool
- Examine how to change sharer plan assignments and updating a resource pool
- Examine how to consolidate plans
- Examine how to create dependencies between plans



# Performance Improvement - 2 Day

## *Impacting the Quality of Your Organization*

***PDU's - 13***

**PMI's Talent Triangle Breakdown**

Technical - 8.00  
Leadership - 3.50  
Strategic - 1.50

**PMI's Certification Breakdown**

PMP/PgMP - 13.00  
PMI-ACP - 5.00  
PMI-SP - 6.00  
PMI-RMP - 5.00  
PfMP - 5.00  
PMI-PBA - 5.00

**Course Description:** This two-day course is designed to teach skills which are vital for improving quality in the workplace. This course will focus on strong project management skills, clearly defined team functions, and pointed communication necessary to drive quality throughout the organization. Participants will learn how to facilitate and implement quality initiatives, monitor the collection of data, and explore planning and monitoring of quality projects.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Compare old and new philosophies**

- Define quality for today
- Develop approaches for adjusting culture
- Identify a prevention mentality rather than a reactive one
- Evaluate data that must be analyzed

- Compare roadblocks to continuous improvement and quality initiative
- Predict characteristics in the cost of quality
- Choose techniques for involving co-workers
- Evaluate Deming's seven deadly diseases
- Discuss the approaches of Deming, Juran and Cosby to quality

**Objective 2: Discuss guidelines for executing continuous quality**

- Examine continuous process improvement
- Describe rules for continuous improvement
- Analyze where continuous improvement can help
- Discuss symptoms of quality concerns
- Identify a continuous improvement team's concern
- Discuss ways to reduce resistance from organizations

**Objective 3: Identify steps for creating a quality action plan**

- Discuss implementation of the quality action plan
- Examine ways of monitoring the quality action plan
- Create improvement rules
- Analyze how to conduct quality audits

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## **Objective 4: Discuss management's role compared to that of the front line employee**

- Examine how to shift from management decision making to team decision making
- Recognize five ways to give proper leadership within a culture
- Label role descriptions and project responsibilities when you have no position power
- Design an agenda for the first project team meeting
- Identify seven things which must be communicated in every project meeting to keep others informed

## **Objective 5: Define the project drivers**

- Show how to set, control, and monitor project scope
- Formulate a Work Breakdown Structure for speeding up the quality approach
- Evaluate the strengths and weaknesses of a critical path in developing quality initiatives
- Examine how to handle delays on projects while driving quality forward
- Discuss implementation of a project plan

## **Objective 6: Apply close down checklists and handoff procedures**

- Identify phase out of the project plan

## **Objective 7: Conduct a postmortem**

- Examine how best practices of a project can make the difference in future success

# ***PMBOK® Guide Overview - 1 Day***

***PDU's - 6.5***

***PMI's Certification Breakdown***

***PMP/PgMP - 6.50***

***PMI's Talent Triangle Breakdown***

***Technical - 6.50***

***Course Description:*** This one-day course gives students an overview of the *Project Management Body of Knowledge (PMBOK® Guide)*. Students will learn the five knowledge areas and key process groups within each.

***Method of teaching:*** *Students will use discussion, cases, and group activities to facilitate the course.*

***Course Objectives:***

**Objective 1: Define a project**

- Discuss the benefits of project management

**Objective 2: Examine the *PMBOK® Guide's* knowledge areas**

**Objective 3: Examine the initiating process group**

- Discuss the Develop Project Charter process
- Discuss the Identify Stakeholders

**Objective 4: Examine the planning process group**

- Discuss the Develop Project Management Plan process
- Discuss the Plan Scope Management process
- Discuss the Collect Requirements process
- Discuss the Define Scope process
- Discuss the Create WBS process
- Discuss the Plan Schedule Management process
- Discuss the Define Activities process
- Discuss the Sequence Activities process
- Discuss the Estimate Activity Durations process

- Discuss the Develop Schedule process
- Discuss the Plan Cost Management process
- Discuss the Estimate Costs process
- Discuss the Determine Budget process
- Discuss the Plan Quality Management process
- Discuss the Plan Resource Management process
- Discuss the Estimate Activity Resources process
- Discuss the Plan Communications Management process
- Discuss the Plan Risk Management process
- Discuss the Identify Risks process
- Discuss the Perform Qualitative Risk Analysis process
- Discuss the Perform Quantitative Risk Analysis process
- Discuss the Plan Risk Responses process
- Discuss the Plan Procurement Management process
- Discuss Plan Stakeholder Engagement process

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## **Objective 5: Examine the executing process group**

- Discuss the Direct & Manage Project Work process
- Discuss the Manage Project Knowledge process
- Discuss the Manage Quality process
- Discuss the Acquire Resources process
- Discuss the Develop Team process
- Discuss the Manage Team process
- Discuss the Manage Communications process
- Discuss Implement Risk Responses process
- Discuss Conduct Procurements process
- Discuss Manage Stakeholder Engagement process

## **Objective 6: Examine the monitoring & controlling process group**

- Discuss the Monitor & Control Project Work process
- Discuss Perform Integrated Change Control process
- Discuss the Validate Scope process
- Discuss the Control Scope process
- Discuss the Control Schedule process
- Discuss the Control Costs process
- Discuss the Control Quality process
- Discuss the Control Resources process
- Discuss the Monitor Communications
- Discuss the Monitor Risk process
- Discuss the Control Procurements process
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## **Objective 7: Examine the closing process group**

- Discuss the Close Project or Phase process

# Proactive Communication and Interview Skills for Gathering Business Requirements - 1 Day

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Technical - 3.25

Leadership - 3.25

## PMI's Certification Breakdown

PMP/PgMP - 6.50

PMI-ACP - 3.25

PMI-SP - 3.25

PMI-RMP - 3.25

PfMP - 3.25

PMI-PBA - 3.25

**Course Description:** This one-day course will focus on ways to use communication as a way to gather detailed information from the customer, analyze the information, and expedite the outcomes desired by the customer. Participants will understand how to focus a message and incorporate means to gain information using effective communication skills. This course will recommend ways of building stronger communication skills and will provide insight into different communication styles. Participants will learn new power by using certain words to impact the message and by asking questions that get noticed. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Evaluate how to approach people**

- Identify perception
- Examine what impacts perception
- Compare reducing perception differences

#### **Objective 2: Discuss how to gain understanding**

- Analyze communication styles
- Develop ways to increase understanding
- Compare kinds of communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common

- Discuss how to match your body language and the message
- List characteristics of a poor listener
- Predict obstacles of listening
- Identify ways of asking questions which open up communication

#### **Objective 3: Examine techniques for disagreeing**

- Discuss caution signs that a disagreement is turning into a conflict

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## **Objective 4: Create questions which explore the customer's desires and requirements**

- Recognize which follow up questions will detail the expressed wishes of the customer
- Analyze the interview data and determine true requirements of the customer
- Develop a sequence of questions which encourages customers to give information freely
- Examine feedback techniques for clarifying the real message being given from the customer
- Evaluate the best feedback technique to use in mirroring the requirements back to the customer for approval
- Analyze interview skills that will give insight into any project

## **Objective 5: Discuss which areas to brainstorm when doing a client project**

- Examine how to set project objectives that are measurable and realistic
- Discuss collecting data and information
- Evaluate how to analyze a problem
- Analyze the best skills and personnel needed to successfully fulfill this project
- Evaluate ways to create a project plan, set expectations, and monitor progress

# Program Management - 2 Day

*PDU*s - 13

*PMI's Certification Breakdown*

PMP/PgMP - 13.00

*PMI's Talent Triangle Breakdown*

Technical - 13.00

**Course Description:** *Program Management* is a two-day class designed to offer direction in managing a number of projects under a common umbrella. These projects will often run within the same timeframe, using the same resources. An effective program manager is able to see an overview of the whole picture while still attending to the individual pieces.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define program management**

- Discuss strategic planning in program management
- Examine proposal management
- Examine the program management plan
- Examine structured diagrams in managing the program
- Identify program control
- Discuss program control tools
- Examine the program manager's role and responsibilities
- Identify the customer's role in program management
- Discuss team selection and team building within the program

### **Objective 2: Identify program management problems and propose solutions**

- Discuss problems with multi-project planning
- Examine the triple constraints in program management

### **Objective 3: Examine program funding resources and authorization**

- Discuss budgets and cost control within a program
- Discuss program organization and staffing
- Describe risk assessment and management within the program
- Identify communication management, external and internal
- Examine time management within the program

# Project Change Management - 1-1/2 Day

*PDU*s - 9.5

## PMI's Talent Triangle Breakdown

Technical - 4.50

Leadership - 2.00

Strategic - 3.00

## PMI's Certification Breakdown

PMP/PgMP - 9.50

PMI-ACP - 5.00

PMI-SP - 5.00

PMI-RMP - 5.00

PfMP - 5.00

PMI-PBA - 5.00

**Course Description:** This one-and-a-half-day seminar will show students how to implement, track, and control changes to the project. This seminar will focus on ways to reduce the uncertainty of project changes. Students will learn how to analyze each change while developing processes, tools, and techniques which can be used immediately. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Discuss the definition of change**

- Analyze why people resist change
- Examine four types of change
- Examine five roles of change agents
- Examine the drivers of change
- Classify the roadblocks to change

### **Objective 4: Examine schedule changes**

- Examine procurement changes
- Examine contract change control
- Examine scope change control
- Examine cost change control
- Create change management processes

### **Objective 2: Identify areas that impact change in people**

- Discuss when to create change quickly or gradually
- Formulate a checklist to determine resistance
- Identify how to deal with setbacks

### **Objective 5: Discuss sources of change**

- Examine how to use impact analysis
- Create change due to corrective actions
- Create change due to preventative actions
- Detail the change control form
- Detail the change request form
- Examine negotiation skills in change management

### **Objective 3: Create a strategy for change**

- Compare change control to change management
- Discuss what is included in integrated change control
- Explain tools for integrated change control

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## **Objective 6: Discuss how to monitor and verify changes have been completed**

- Create a strategy for examining risk after change approval
- List the benefits of documentation in various situations
- Analyze the impact of change

## **Objective 7: Define change control board**

- Analyze the roles and responsibilities of change control board
- Compare positive and negative change control boards
- Discuss who should be on the change control board
- Create an internal process to work with change control board
- Discuss best practices for change control board

# Project Change Management - 2 Day

## *How to Implement, Track, and Control Project Changes*

***PDU's - 13***

### **PMI's Talent Triangle Breakdown**

Technical - 7.00  
Leadership - 2.00  
Strategic - 4.00

### **PMI's Certification Breakdown**

PMP/PgMP - 13.00  
PMI-ACP - 6.00  
PMI-SP - 6.00  
PMI-RMP -65.00  
PfMP - 6.00  
PMI-PBA -65.00

***Course Description:*** This two-day seminar will show students how to implement, track, and control changes to the project. This seminar will focus on ways to reduce the uncertainty of project changes. Students will learn how to analyze each change while developing processes, tools and techniques which can be used immediately. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** *Students will use discussion, cases, and group activities to facilitate the course.*

### ***Course Objectives:***

#### **Objective 1: Discuss the definition of change**

- Identify proactive and reactive characteristics
- Analyze why people resist change
- Examine four types of change
- Examine five roles of change agents
- Examine the drivers of change
- Classify the roadblocks to change

- Formulate a checklist to help determine resistance
- Identify how to deal with setbacks

#### **Objective 2: Identify three areas that impact change in people**

- Assess five new focuses from change
- Examine six ways fear hinders change
- Examine seven qualities of a paralyzed state
- Identify eight factors that determine a person's viewpoint
- Compare four ways people respond to change
- Discuss when to create change quickly or gradually

#### **Objective 3: Create a strategy for change**

- Analyze a force field analysis
- Create an action plan
- Compare change control to change management
- Discuss what is included in integrated change control
- Explain tools for integrated change control
- Discuss the benefits of written change requests

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## **Objective 4: Examine schedule changes**

- Examine procurement changes
- Examine contract change control
- Examine scope change control
- Examine cost change control
- Create change management processes

## **Objective 5: Discuss sources of change**

- Create change due to corrective actions
- Create change due to preventative actions

## **Objective 6: Discuss how to monitor and verify changes have been completed**

- Discuss change authorization policies
- Create a strategy for examining risk after change approval
- List the benefits of documentation in various situations
- Analyze the impact of change

## **Objective 7: Define change control board**

- Compare positive and negative change control boards
- Analyze the roles and responsibilities of change control board
- Discuss who should be on the change control board
- Create an internal process to work with change control board
- Discuss best practices for change control board

# Project Change Management - 3 Day

## *A Systematic Approach to Controlling Project Changes*

***PDU's - 19.5***

**PMI's Talent Triangle Breakdown**

Technical - 17.50

Strategic - 2.00

**PMI's Certification Breakdown**

PMP/PgMP - 19.50

PMI-ACP - 2.00

PMI-SP - 2.00

PMI-RMP - 2.00

PfMP - 2.00

PMI-PBA - 2.00

***Course Description:*** This three-day seminar will show students how to implement, track, and control changes to the project. This seminar will focus on the examination of the change control board, procedures which will guide configuration management, and ways to negotiate changes with the customer. Students will learn how to protect the change management process while pleasing the customer. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

***Course Objectives:***

**Objective 1: Discuss the definition of change**

- Identify proactive and reactive characteristics
- Analyze why people resist change
- Examine four types of change
- Examine five roles of change agents
- Examine the drivers of change
- Classify the roadblocks to change

- Formulate a checklist to help determine resistance
- Identify how to deal with setbacks

**Objective 3: Create a strategy for change**

- Analyze a force field analysis
- Create an action plan
- Compare change control to change management
- Discuss what is included in integrated change control
- Explain tools for integrated change control
- Discuss the benefits of written change requests

**Objective 2: Identify three areas that impact change in people**

- Assess five new focuses from change
- Examine six ways fear hinders change
- Examine seven qualities of a paralyzed state
- Identify eight factors that determine a person's viewpoint
- Compare four ways people respond to change
- Discuss when to create change quickly or gradually

*(Continued on next page)*

## **Objective 4: Examine configuration management**

- Identify the benefits of configuration management
- Identify and detail the key elements of:
  - Configuration management
  - Configuration identification
  - Configuration control
  - Configuration status accounting
  - Audit of configuration

## **Objective 5: Examine schedule and procurement changes**

- Examine contract, scope, and cost change control
- Create a change management processes

## **Objective 6: Discuss sources of change**

- Create change due to corrective actions
- Create change due to preventative actions

## **Objective 7: Discuss how to monitor and verify changes have been completed**

- Discuss change authorization policies
- Create a strategy for examining risk after change approval
- List the benefits of documentation
- Analyze the impact of change

## **Objective 8: Define change control board (CCB)**

- Compare positive and negative CCBs
- Analyze the roles and responsibilities of change control board
- Discuss who should be on the CCB
- Create an internal process to work with CCB
- Discuss best practices for CCB

## **Objective 9: Identify the roles of change management for the project manager, project sponsor, team members, and the CCB**

## **Objective 10: Identify and detail the fields of a change request form**

- Create a change request form
- Discuss change request timing
- Identify and detail the fields of a change request log
- Discuss unmanaged and managed changes in regard to time, energy, and resources

## **Objective 11: Examine negotiation skills in project change management**

- Identify negotiation personalities
- Discuss making offers and counteroffers

## **Objective 12: Discuss when to walk away**

- Examine human responses to change
- Discuss responses to controllable change
- Discuss responses to uncontrollable change

# Project Communications Management – 1 Day

## *PDU*s – 6.5

### *PMI's Talent Triangle Breakdown*

Technical - 3.25

Leadership - 3.25

### *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 3.25

PMI-SP - 3.25

PMI-RMP - 3.25

PfMP - 3.25

PMI-PBA - 3.25

**Course Description:** This one-day course will focus on ways to use project communication and communication theories as a way to influence others within and outside of the project team. Participants will learn how to focus on framing the data and information in a correct manner. Participants will also learn the proper usage of words and language for influencing project stakeholders. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### *Course Objectives:*

#### **Objective 1: Analyze the value of project interviews**

- Evaluate how to approach people
- Identify perception
- Examine what impacts project perception
- Compare reducing perception differences

#### **Objective 2: Discuss how to gain understanding**

- Demonstrate what to do when you mess up
- Analyze communication styles
- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common

- Detail characteristics of a poor listener
- Predict obstacles of listening during projects
- Examine project communication channels

#### **Objective 3: Define project management's role in project meetings**

- Describe ingredients of effective project meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback

# Project Communications Management - 1-1/2 Day

*PDU*s - 9.5

## PMI's Talent Triangle Breakdown

Technical - 3.25

Leadership - 6.25

## PMI's Certification Breakdown

PMP/PgMP - 9.5

PMI-ACP - 6.25

PMI-SP - 6.25

PMI-RMP - 6.25

PfMP - 6.25

PMI-PBA - 6.25

**Course Description:** This one-and-a-half-day course will focus on ways to use project communication and communication theories as a way to influence others within and outside of the project team. Participants will learn how to focus on framing the data and information in a correct manner. Participants will also learn the proper usage of words and language for influencing project stakeholders. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Identify perception**

- Examine what impacts project perception
- Compare reducing perception differences

### **Objective 2: Discuss how to gain understanding**

- Demonstrate what to do when you mess up
- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated online
- Identify questions to ask if miscommunication is common
- Evaluate verbal softeners
- Predict obstacles of listening during projects

### **Objective 3: Define project management's role in project meetings**

- Describe ingredients for effective meetings
- Evaluate receiving feedback on performance

- Compare how to communicate with people from different generations
- Compare various types of written and verbal communication
- Examine barriers to communication
- Describe types of listening
- Evaluate performance reviews and status reports
- List network models
- Examine how to conduct a Lessons Learned

### **Objective 4: Define the processes in Project Communications Management**

- Detail the process of Plan Communications Management
- Detail the process of Manage Communications
- Detail the process of Monitor Communications

# Project Communications Management - 2 Day

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 11.00

Leadership - 2.00

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 2.00

PMI-SP - 2.00

PMI-RMP - 2.00

PfMP - 2.00

PMI-PBA - 2.00

**Course Description:** This two-day course will focus on ways to use project communication and communication theories as a way to influence others within and outside of the project team. Participants will learn how to focus on framing the data and information in a correct manner. Participants will also learn the proper usage of words and language for influencing project stakeholders. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Analyze the value of project**

#### **interviews**

- Evaluate how to approach people
- Identify perception
- Examine what impacts project perception
- Compare reducing perception differences

### **Objective 2: Discuss how to gain understanding**

- Demonstrate what to do when you mess up
- Analyze communication styles
- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common

- Evaluate verbal softeners
- Detail characteristics of a poor listener
- Predict obstacles of listening during projects

### **Objective 3: Define project management's role in project meetings**

- Describe ingredients of effective meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback

### **Objective 4: Examine techniques for disagreeing**

- Discuss caution signs that a disagreement is turning into a conflict
- Formulate seven stages of intergroup conflict in project teams
- Describe ways to reduce intergroup conflict in project meetings

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## **Objective 5: Define the processes in project**

### **communications management**

- Detail the process of Plan Communications Management
- Detail the process of Manage Communications
- Detail the process of Monitor Communications

# Project Cost Management - 1 Day

*PDU*s - 6.5

*PMI's Certification Breakdown*

PMP/PgMP - 6.50

*PMI's Talent Triangle Breakdown*

Technical - 6.50

**Course Description:** This one-day course will focus on basic cost management theories and techniques. Students will learn how to give value to the customer beyond cost. There will also be a discussion of ways to get the project back on track and how to adjust budgeting issues during over expenditures. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Examine budgeting basics**

- Review estimating techniques
  - Past history
  - Effort
  - Hours
  - Resources
  - Contingency
  - Rework
  - Labor
  - Technology
  - Pilot program
  - Training
  - Roll out
  - Building/facility
  - Maintenance
  - Follow-up
- Discuss the pre-estimating process
- Evaluate constraint estimating
- Examine team design
- Discuss expert estimating
- Analyze cost projections
- Assess creative steps to estimating
- Detail the problem

### **Objective 2: Examine estimating the initial cost**

- List constraints which impact cost
- Compare cost control systems

- Discuss cost estimate basics
- Review types of estimates
- Discover how to figure the ROI on your project
- Discover how to allocate costs

### **Objective 3: Discuss how to handle emergencies**

- Evaluate unplanned work
- Examine scope creep
- Examine scope change
- Identify what to do when the estimate is too high
- Examine how to get the project back on budget

### **Objective 4: Define the processes of project cost management**

- Examine the process of Plan Cost Management
- Examine the process of Estimate Costs
- Examine the process of Determine Budget
- Examine the process of Control Costs

# Project Integration Management – 1 Day

## ***PDU*s – 6.5**

### **PMI's Talent Triangle Breakdown**

Technical - 5.50

Leadership - 1.00

### **PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-ACP - 1.00

PMI-SP - 2.00

PMI-RMP - 1.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This one-day course will focus on ways employees can run projects faster and more effectively. This course will teach participants how to successfully create, monitor, and guide the project's scope and critical path and how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts. Lastly, this course will examine the entire process of project planning and how to create successful practices in the future. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### ***Course Objectives:***

#### **Objective 1: Define the six-step project management process**

- Examine the project's life cycle

#### **Objective 2: Design a proactive interview process**

- Demonstrate interviewing techniques that will assist in determining project specifics
- Show how to set, control, and monitor project scope
- Manage brainstorming and planning meetings

#### **Objective 3: Classify who to place on your project team**

- Label role descriptions and project responsibilities when you have no position power
- Create a modified code of conduct for running an empowered team
- Classify how to manage the project through influence rather than power

#### **Objective 4: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a WBS (Work Breakdown Structure)
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Analyze strengths and weaknesses of a Gantt chart

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## **Objective 5: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of a project plan

## **Objective 6: Identify important items which must be communicated in every project**

- Review who should be communicated to
- Describe ways to communicate bad news

## **Objective 7: Apply close down checklists and handoff procedures**

- Identify phase out of the project
- Perform a postmortem

## **Objective 8: Examine the integration process in project management**

- Examine integration skills needed by the project manager
- Define the major processes in project integration
- Detail the integration process of project plan development
- Detail the integration process of project plan execution
- Detail the integration process of project change control

# Project Integration Management - 3 Day

## ***PDU's - 19.5***

### **PMI's Talent Triangle Breakdown**

Technical - 15.50

Leadership - 3.00

Strategic - 1.00

### **PMI's Certification Breakdown**

PMP/PgMP - 19.50

PMI-ACP - 4.00

PMI-SP - 5.00

PMI-RMP - 4.50

PfMP - 4.00

PMI-PBA - 4.00

**Course Description:** This three-day course will focus on ways employees can run projects faster and more effectively. This course will recommend a six-phase process, as well as numerous preventative actions to efficiently speed up a project. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path and how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts. Lastly, this course will examine the entire process of project planning and how to create successful practices in the future. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### ***Course Objectives:***

#### **Objective 1: Define the six-step project management process**

- Examine the project's life cycle
- Assess five ways to give proper leadership within culture
- Identify the triple constraints of every project
- Define the project drivers

#### **Objective 2: Design an agenda for the first project team meeting**

- Demonstrate interviewing techniques that will assist in determining project specifics
- Review constraint red flags to watch
- Show how to set, control, and monitor project scope
- Summarize major areas to brainstorm
- Manage brainstorming and planning meetings

- Identify a checklist for team meetings
- Analyze signs of poor updates

#### **Objective 3: Classify who to place on your project team**

- Label role descriptions and project responsibilities when you have no position power
- Create a modified code of conduct for running an empowered team
- Classify how to manage the project through influence rather than power

*(Continued on next page)*

## **Objective 4: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a WBS (Work Breakdown Structure)
- Discuss how to track multiple projects
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Examine characteristics of a milestone
- Analyze strengths and weaknesses of a Gantt chart

## **Objective 5: Define the critical path**

- Evaluate the strengths and weaknesses of a critical path
- Describe how to handle delays
- Discuss effects of a late start
- Assess how to crash a project
- Summarize danger signals to watch

## **Objective 6: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of the project plan

## **Objective 7: Identify seven things which must be communicated in every project**

- Review who should be communicated to
- Evaluate the results of poor communication
- Describe ways to communicate bad news

## **Objective 8: Apply close down checklists and handoff procedures**

- Identify phase out of the project
- Perform a postmortem

## **Objective 9: Examine the integration process in project management**

- Examine integration skills needed by the project manager
- Define the major processes in project integration
- Detail the integration process of project plan development
- Detail the integration process of project plan execution
- Detail the integration process of project change control

# Project Management Concepts - 1 Day

## *PDU's - 6.5*

### *PMI's Talent Triangle Breakdown*

Technical - 6.00

Leadership - 0.50

### *PMI's Certification Breakdown*

PMP/PgMP - 6.5

PMI-ACP - 0.50

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** This one-day course will provide an overview of the project management concepts and how they function within the organizational environment. It will include applicable hands-on activities and team exercises. Participants will learn tools and techniques which will help them run their projects faster and more effectively. This course will follow the Project Management Institute's process groups and knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Recognize the process groups and knowledge areas of project management**

- Examine the project manager's role
- Define project charter and project success
- Identify and detail the scope of a project including scope statement and scope definition
- Discuss freezing scope, scope validation, and scope control
- Formulate a Work Breakdown Structure (WBS)

#### **Objective 2: Define the real critical path**

- Discuss decomposition techniques
- Define activity sequencing and various tools, precedence diagramming method
- Examine tools for schedule development including critical path method, duration compression, simulation
- Compare estimating techniques
- Discuss schedule control

#### **Objective 3: Discuss quality planning**

- Define and detail performance reporting

#### **Objective 4: Examine communications management**

#### **Objective 5: Examine risk management planning**

- Detail tools for risk identification: brainstorming, interviewing, SWOT analysis, Delphi technique, etc.
- Discuss risk control

#### **Objective 6: Examine characteristics of effective and ineffective teams**

- Discuss barriers to team development
- Examine team building and leadership skills

#### **Objective 7: Define cost control, schedule control, and closing procurements**

# Project Management Concepts - 2 Day

*PDU's - 13.5*

## *PMI's Talent Triangle Breakdown*

Technical - 13.00

Leadership - 0.50

## *PMI's Certification Breakdown*

PMP/PgMP - 13.50

PMI-ACP - 0.50

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** This two-day course will provide an overview of the project management concepts and how they function within the organizational environment. It will include applicable hands-on activities and team exercises. Participants will learn tools and techniques which will help them run their projects faster and more effectively. This course will follow the Project Management Institute's process groups and knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Recognize the process groups and knowledge areas of project management**

- Examine the project manager's role in project management
- Define project charter
- Identify and detail the scope of a project including scope statement and scope definition
- Discuss scope verification and scope control
- Formulate a (WBS) work breakdown structure

### **Objective 2: Define the real critical path**

- Discuss decomposition techniques
- Define activity sequencing and various tools, precedence diagramming method
- Examine tools for schedule development including critical path method, duration compression, simulation
- Discuss schedule control

### **Objective 3: Discuss quality planning**

- Examine tools such as benefit cost analysis, benchmarking, and flow charting
- Define and detail performance reporting

### **Objective 4: Create a sample communication plan**

- Assess how to handle delays

### **Objective 5: Examine risk management planning and detail a risk management plan**

- Detail tools for risk identification: brainstorming, interviewing, SWOT analysis, Delphi technique, etc.
- Discuss risk monitoring and control

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## **Objective 6: Define and detail project team**

- Examine characteristics of effective and ineffective teams
- Determine destructive and supportive roles of team members
- Identify team motivation and team development
- Discuss dealing with conflict and maintaining accountability

## **Objective 7: Define and detail earned value**

**analysis including schedule variance, cost variance, cost performance index, schedule performance index**

## **Objective 8: Examine the process of closing a project including contract closure**

- Create a close down checklist and handoff procedures

# Project Management Mistakes and How to Avoid Them for Project Success - 2 Day

*PDU*s – 13

## PMI's Talent Triangle Breakdown

Technical - 12.00

Leadership - 1.00

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 1.00

PMI-SP - 2.00

PMI-RMP - 2.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This course will explore 14 common project management mistakes made during the life cycle of a project. Mistakes are identified; solutions are developed and applied so that these mistakes are manageable or avoided altogether. This course will follow the Project Management Institute's process groups and knowledge areas of the *PMBOK® Guide*. Each student will receive a copy of the book, *21 Deadly Project Management Mistakes* by Dr. Keith Mathis.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### **Course Objectives:**

**Objective 1: Examine the mistake of planning before a customer interview is completed**

**Objective 8: Examine the mistake of no project audits**

**Objective 2: Examine the mistake of top-down planning**

**Objective 9: Examine the mistake of turf battles**

**Objective 3: Examine the mistake of vague roles and responsibilities definition**

**Objective 10: Examine the mistake of not monitoring the critical path**

**Objective 4: Examine the mistake of little accountability when productivity is low**

**Objective 11: Examine the mistake of conflict with culture and project command**

**Objective 5: Examine the mistake of an unrealistic timeline**

**Objective 12: Examine the mistake of overcommitting team members**

**Objective 6: Examine the mistake of a limited risk analysis**

**Objective 13: Examine the mistake of not confronting the status quo**

**Objective 7: Examine the mistake of a poor communication plan**

**Objective 14: Examine the mistake of no close down plan for ending the project**

# Project Management Mistakes and How to Avoid Them for Project Success - 3 Day

*PDU*s – 19.5

## PMI's Talent Triangle Breakdown

Technical - 18.00

Leadership - 1.50

## PMI's Certification Breakdown

PMP/PgMP - 19.50

PMI-ACP - 1.50

PMI-SP - 2.50

PMI-RMP - 2.50

PfMP - 1.50

PMI-PBA - 1.50

**Course Description:** This course will explore 21 common project management mistakes made during the life cycle of a project. Mistakes are identified; solutions are developed and applied so that these mistakes are manageable or avoided altogether. This course will follow the Project Management Institute's process groups and knowledge areas of the *PMBOK® Guide*. Each student will receive a copy of the book, *21 Deadly Project Management Mistakes* by Dr. Keith Mathis.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### **Course Objectives:**

**Objective 1: Examine the mistake of no established project methodology with fits organizational culture**

**Objective 2: Examine the mistake of planning before a customer interview is completed**

**Objective 3: Examine the mistake of top-down planning with little input from those working on the project**

**Objective 4: Examine the mistake of creating teams with improper skills**

**Objective 5: Examine the mistake of vague roles and responsibilities definition**

**Objective 6: Examine the mistake of little accountability when productivity is low**

**Objective 7: Examine the mistake of an unrealistic timeline**

**Objective 8: Examine the mistake of a shallow WBS**

**Objective 9: Examine the mistake of no implementation plan**

**Objective 10: Examine the mistake of a limited risk analysis**

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**Objective 11: Examine the mistake of a poor communication plan**

**Objective 17: Examine the mistake of conflict with culture and project command**

**Objective 12: Examine the mistake of no project audits**

**Objective 18: Examine the mistake of overcommitting team members**

**Objective 13: Examine the mistake of inadequate performance appraisals**

**Objective 19: Examine the mistake of not confronting the status quo**

**Objective 14: Examine the mistake of turf battles**

**Objective 20: Examine the mistake of no close down plan for ending the project**

**Objective 15: Examine the mistake of not monitoring the critical path**

**Objective 21: Examine the mistake of not creating a best practices**

**Objective 16: Examine the mistake of no system to track change orders**

# Project Management Office (PMO) - 3 Day

## *Creating a Center of Excellence for Efficient Project Delivery*

### ***PDU's - 19.5***

#### **PMI's Talent Triangle Breakdown**

Technical - 17.00  
Leadership - 1.50  
Strategic - 1.00

#### **PMI's Certification Breakdown**

PMP/PgMP - 19.50  
PMI-ACP - 2.50  
PMI-SP - 2.50  
PMI-RMP - 2.50  
PfMP - 3.50  
PMI-PBA - 2.50

**Course Description:** This three-day course will give each participant an in-depth opportunity to engage in a complete examination of the breadth of the Project Management Office. Participants will examine the role, purpose, and different models used, as well as how an organization would approach establishing a PMO. Participants will learn best practices for establishing, managing, and successfully leading toward project excellence with a PMO. We will discuss methodologies for the PMO that will allow students to understand and implement project management core competencies across the organization.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### ***Course Objectives:***

#### **Objective 1: Examine why a PMO fails**

- Discuss various environments in which a PMO will thrive
- Discuss the reasons why any organization should consider a PMO
- Examine how a PMO impacts organizational change and internal culture
- Examine the PMO in relationship to portfolio management
- Relate the PMO to project management
- Examine the relationship with program management
- Discuss the differences between a Project Office and a Center of Excellence
- Create a list of standards the PMO will follow
- List what a PMO should do
- Identify how the PMO should support the strategic plan
- Discuss the link between strategic objectives and PMO
- Analyze the PMO model
- Apply PMO governance

*(Continued on next page)*

## **Objective 2: Assemble the right PMO staff**

- Examine the role of executive leadership and sponsorship to the PMO
- Create the PMO methodology and services
- Discuss the PMO roles and responsibilities
- Discuss organizational change and acceptance of the PMO
- Discuss training and mentoring provided by PMO
- Examine core competencies and a team development model

## **Objective 3: Develop a curriculum for internal project management training**

- Discuss the benefits of creating an internal certification
- Create metrics for measuring the PMO effectively
- Discuss evaluation and oversight strategies
- Examine project recovery processes and solutions
- Develop a model for creating internal best practices

## **Objective 4: Discuss better ways of establishing customer relationships**

- Examine the relationship between a PMO and vendor contractor

# Project Monitoring, Evaluation, and Oversight - 2 Day

## *PDU's - 13*

### *PMI's Talent Triangle Breakdown*

Technical - 12.00  
Leadership - 0.75  
Strategic - 0.25

### *PMI's Certification Breakdown*

PMP/PgMP - 13.00  
PMI-ACP - 1.00  
PMI-SP - 1.00  
PMI-RMP - 1.00  
PfMP - 1.00  
PMI-PBA - 1.00

**Course Description:** This two-day course will examine how to establish processes and evaluation techniques for auditing project solutions. Students will learn data collection techniques and how to convert soft data to monetary values which can be measured and evaluated. Students will discover various audits and how to measure project components such as performance, resources, planning, customer relationships, and vendor-contractor relationships. This course will also focus on establishing process improvements in the maintaining of oversight procedures. Students will be able to apply widely accepted standards and preferred evaluation and oversight principles, as well as provide means to compile, analyze, and optimize project performance. We will explore ways to deliver feedback and make recommendations to the appropriate individuals in the organization. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Define project oversight and why it is needed in organizations**

- Develop evaluation processes and procedures
- Compare the difference between research and evaluation
- Evaluate current hindrances facing organizations when conducting oversight
- Analyze various ways of setting standards and measurements for projects
- Examine project metrics and requirements
- Define internal stakeholders for oversight and evaluation
- Discuss benchmarking techniques
- Define the what, why and how of evaluation

- Develop methods to evaluate projects you did not create
- Discuss models of successful evaluation
- Classify key success factors

#### **Objective 2: Examine data collection methods, formats, and data analysis**

- Evaluate ways to measure skills and knowledge
- Analyze how to calculate and interpret ROI
- Identify application and implementation costs
- Discuss forecasting methods
- Design evaluation templates and tools to conduct audits

*(Continued on next page)*

## **Objective 3: Examine project planning audit**

- Examine project performance audit
- Examine project resource audit
- Compare technology audits
- Examine customer acceptance audit
- Discuss vendor-contractor audits
- Create evaluation reports that impact the organization in a positive way

## **Objective 4: Discuss methods for making recommendations which encourage rather than disrespect**

- Evaluate recording techniques for making recommendations
- Discuss recovery assessment processes
- Examine recovery indicators
- Examine a project recovery plan



# Project Performance Management - 2 Day

## *PDU's - 13*

### *PMI's Talent Triangle Breakdown*

Technical - 12.50

Strategic - 0.50

### *PMI's Certification Breakdown*

PMP/PgMP - 13.00

PMI-ACP - 0.50

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** This two-day course will focus on developing strategies for tracking performance in project teams. Participants will examine issues such as benchmarking performance and establishing a gap between desired project performance and preferred performance. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Discuss advantages of performance management**

- Identify performance needs
- Identify performance to project directives
- Analyze ways to communicate performance expectations in every project

#### **Objective 2: Define ways of discovering the performance gap**

- Classify benchmarking techniques of present performance
- Discuss training and the performance gap

#### **Objective 3: Examine questions to ask in determining project performance**

- Discuss how to break down project performance into understandable steps
- Define how to map the performance map
- Review monitoring of project performance indicators

#### **Objective 4: Show how to link operational goals to project performance**

- Analyze mentoring roles in advancing project performance
- Examine the impact of incorporating best practices in project performance
- Evaluate how to create a project performance results matrix
- Develop a project performance development plan to transition team members toward peak performance

# Project Procurement Management - 1 Day

## *PDU's - 6.5*

### *PMI's Talent Triangle Breakdown*

Technical - 6.00

Leadership - 0.50

### *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 0.50

PMI-SP - 0.50

PMI-RMP - 0.50

PfMP - 0.50

PMI-PBA - 0.50

**Course Description:** This one-day course is structured to lay the proper foundation for procurement principles and processes. The emphasis of this program is to help teams or individuals learn how to function in the procurement world in day-to-day operations. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Examine the contracting process**

- Compare the different buying decisions
- Compare the different buying roles
- Discuss the methods of contracting
- Evaluate the benefits of competition
- Analyze failure with competition

#### **Objective 2: Examine non-competitive contracting**

- Define sealed bids
- Discuss simplified agreements
- Compare contracting types
- Discuss time, material, hours
- Examine value-based pricing
- Examine fixed-based pricing
- Explain purchase orders
- Describe evaluating and awarding contracts

#### **Objective 3: Construct a SOW**

- Create specifics for a proposal
- Examine managing proposals
- Discuss how to conduct a search for contract source

#### **Objective 4: Create a selection matrix**

- Label selection ratings
- Develop scoring criteria
- Explain rating risk analysis of the proposal

#### **Objective 5: Examine negotiation**

- Discuss the principles of negotiation
- Evaluate systems for successful negotiation

*(Continued on next page)*

## **Objective 6: List price and budgeting requirements**

- Examine interpreting changes
- Analyze the termination of contracts
- Discover how to handle appeals and disagreements in contracts
- Examine contract closeout planning

## **Objective 7: Define the processes of project procurement management**

- Detail the process of Plan Procurement Management
- Detail the process of Conduct Procurements
- Detail the process of Control Procurements

# Project Quality Assurance, Monitoring and Auditing - 2 Day

*PDU*s - 13

*PMI's Certification Breakdown*  
PMP/PgMP - 13.00

*PMI's Talent Triangle Breakdown*  
Technical - 13.00

**Course Description:** In this two-day course, participants will focus on issues such as how to maintain quality by using audits and evaluations for monitoring purposes. Quality theories taught by Drs. Deming and Juran will be included as foundations for implementing new quality initiatives. In addition, several types of project audits will be explored as a means of controlling the project with more efficiency. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Methods:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Examine continuous process improvement for project processes**

- Discuss five key checkpoints for quality management
- Analyze the mainline quality and monitoring processes
- Analyze the specific actions to improve quality
- Discuss quantitative measurements
- Examine the six general types of cost

### **Objective 2: Analyze the tools for quality control**

- Evaluate Deming's 14 points to maintaining quality
- Identify Juran's 10 symptoms to quality problems
- Define the three major processes of project quality management
- Examine the process of quality assurance
- List the nine C's of quality

- Evaluate the four steps to Force Field Analysis
- Discuss seven keys to problem solving implementation

### **Objective 3: Examine benefits of project auditing**

- Analyze project performance audit
- Examine customer acceptance audit
- Discuss methods for making recommendations
- Compare recording techniques for making recommendations
- Develop project audit performance points

### **Objective 4: Discuss recovery assessment process and model**

- Examine recovery indicators
- Examine a project recovery plan
- Discuss recovery lessons learned

# Project Quality Management - 1 Day

*PDU*s - 6.5

*PMI's Certification Breakdown*

PMP/PgMP - 6.50

*PMI's Talent Triangle Breakdown*

Technical - 6.50

**Course Description:** In this one-day course, participants will focus on how to deliver the level of quality that is required by the customer and how to keep continuous improvement throughout the project. In addition, this course will also expose participants to various project quality tools and teach them how to use those tools in a project setting. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Compare old and new philosophies in project management**

- Define quality for today's projects
- Identify a prevention mentality rather than a reactive one
- Set up guidelines for executing continuous quality through the project
- Discuss symptoms of quality concerns in past and future projects

**Objective 2: Predict characteristics to the cost of quality in projects**

- Choose techniques for involving co-workers
- Evaluate Deming's seven deadly diseases
- Identify Juran's six-step approach to quality

**Objective 3: Define project quality management**

- Define the processes of project quality management

- Examine the process of Plan Quality Management
- Examine the process of Manage Quality
- Examine the process of Control Quality

**Objective 4: Examine creative solutions in solving project plans**

- Evaluate the four steps to Force Field Analysis
- Discuss the benefits of Force Field Analysis
- Define contingency planning and examine the crisis correctly
- Evaluate the strength of project audits

**Objective 5: Define recovery plan**

- Examine the range of project recovery
- Discuss the nine C's of quality

# Project Quality Management - 2 Day

***PDU's - 13***

**PMI's Talent Triangle Breakdown**

Technical - 12.75

Leadership - 0.25

**PMI's Certification Breakdown**

PMP/PgMP - 13.00

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 0.25

PfMP - 0.25

PMI-PBA - 0.25

***Course Description:*** In this two-day course, participants will focus on additional planning of the project while examining issues such as how to keep continuous improvement, symptoms of quality concerns, and how to maintain quality throughout the project. In addition, participants will study techniques and theories taught by Drs. Deming and Juran as foundations for implementing new quality plans. Specifically, this course will focus on conducting risk analysis, problem solving, handling conflict, and maintaining quality throughout the entire project. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

***Course Objectives:***

**Objective 1: Compare old and new philosophies in project management**

- Define quality for today's projects
- Identify a prevention mentality rather than a reactive one
- Evaluate data that must be analyzed
- Set up guidelines for executing continuous quality through the project
- Examine continuous process improvement for project processes
- List rules for continuous improvement
- Analyze where continuous improvement can help
- Discuss symptoms of quality concerns in past and future projects

- Design a continuous improvement for the project team's concern
- Judge ways to reduce resistance from the organizational culture
- Compare roadblocks to continuous improvement and quality initiative

**Objective 2: Predict characteristics to the cost of quality in projects**

- Choose techniques for involving co-workers
- Evaluate Deming's seven deadly diseases
- Identify Juran's six-step approach to quality

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## **Objective 3: List steps for creating a quality action plan in projects**

- Discuss implementation of the quality action plan
- Examine ways of monitoring the quality action plan
- Identify the strengths and weaknesses of Gantt charting
- Discuss the strengths and weaknesses of CPM charting

## **Objective 4: Define project quality management**

- Define the processes of project quality management
- Examine the process of Plan Quality Management
- Examine the process of Manage Quality
- Examine the process of Control Quality

## ***Problem Solving Module***

## **Objective 5: Classify who should be on the problem-solving team**

- Evaluate why participation helps solve the problem faster
- Discuss benefits of problem-solving analysis in projects
- Review what influences the problem solving experience in projects
- Define the problem solving processes for successful projects
- Assess the resources needed to fulfill the problem-solving plan

## **Objective 6: Examine creative solutions in solving project plans**

- Compare what to do if you inherit a goofy solution
- Perform a SWOT Analysis
- Evaluate the four steps to Force Field Analysis
- Discuss the benefits of Force Field Analysis
- Define contingency planning and examine the crisis correctly

## **Objective 7: Evaluate how to implement the solution**

- Discuss seven keys to problem-solving implementation
- Identify the seven reasons for implementation failure

# Project Resource Management - 1 Day

## ***PDU's - 6.5***

### **PMI's Talent Triangle Breakdown**

Technical - 3.25

Leadership - 3.25

### **PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-ACP - 3.25

PMI-SP - 3.25

PMI-RMP - 3.25

PfMP - 3.25

PMI-PBA - 3.25

**Course Description:** In this one-day course, participants will focus on the area of resources in a project. This area includes the processes that organize, manage, and lead the project team. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Identify and define the project resource management processes**

- Plan Resource Management
- Estimate Activity Resources
- Acquire Resources
- Develop Team
- Manage Team
- Control Resources

#### **Objective 2: Examine the process group of Plan Resource Management**

- Identify inputs and outputs
- Detail tools and techniques used in this process: expert judgment, data representation, organizational theory, and meetings

#### **Objective 3: Examine the process group of Estimate Activity Resources**

- Identify inputs and outputs
- Detail tools and techniques used in this process: expert judgment, bottom-up estimating, analogous estimating, parametric estimating, data analysis, project management information system, meetings

#### **Objective 4: Examine the process group of Acquire Resources**

- Identify inputs and outputs
- Detail tools and techniques used in this process: decision making, interpersonal and team skills, pre-assignment, and virtual teams

*(Continued on next page)*



## **Objective 5: Examine the process group of Develop**

### **Team**

- Identify inputs and outputs
- Detail tools and techniques used in this process: collocation, virtual teams, communication technology, interpersonal and team skills, recognition and rewards, training, individual and team assessments, and meetings

## **Objective 6: Examine the process group of Manage**

### **Team**

- Identify inputs and outputs
- Detail tools and techniques used in this process: interpersonal and team skills and project management information system

## **Objective 7: Examine the process group of Control**

### **Resources**

- Identify inputs and outputs
- Detail tools and techniques used in this process: data analysis, problem solving, interpersonal and team skills, project management information system

## **Objective 8: Identify and examine motivation**

### **theories**

## **Objective 9: Identify and examine phases of**

### **performance management**

# Project Resource Management - 2 Day

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 4.00  
Leadership - 8.50  
Strategic - 0.50

## PMI's Certification Breakdown

PMP/PgMP - 13.00  
PMI-ACP - 9.00  
PMI-SP - 9.00  
PMI-RMP - 9.00  
PfMP - 9.00  
PMI-PBA - 9.00

**Course Description:** This two-day course will focus on planning for resource needs. It is filled with behavioral skills that will help motivate, equip, and keep project team members accountable and on task. This course will also include issues such as conflict. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

## **Course Objectives:**

### **Objective 1: Define the processes of project resource management**

- Detail the process of Plan Resource Management
- Detail the process of Estimate Activity Resources
- Detail the process of Acquire Resources
- Detail the process of Develop Team
- Detail the process of Manage Team
- Detail the process of Control Resources

## **Managing Team Module**

### **Objective 2: Analyze job responsibilities**

- Discuss priority checklist
- Assess modern day accountability myths

### **Objective 3: Evaluate how to coach project team toward success**

- Develop workers with new skills
- Define ways to equip and empower
- Discuss values of successful coaching of project teams
- Analyze common coaching mistakes of project teams

### **Objective 4: Develop a Mission Statement and Vision**

- Develop core values
- Identify vision through leadership
- Examine why visions fail
- Evaluate where you are going
- Explain tough-minded leadership

*(Continued on next page)*

## **Objective 5: Contrast different change strategies**

- Classify why project teams block change
- Choose ways to reduce project team resistance
- Evaluate changes which support goals

## **Objective 6: Discuss strategies for creating trust**

- Describe requirements for being an overcomer on project teams
- Analyze two types of motivation within a project team
- Examine ways to align motivational techniques to workers
- Analyze the disciplining of project team members and ways of changing behavior
- Identify how to track project team members

## ***Conflict Module***

## **Objective 7: Discuss the positive side of conflict**

- Define conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers

## **Objective 8: Examine rules for handling anger**

- Choose words to use that help
- Create action plans for quick resolution
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict
- Compare the seven stages of group conflict
- Compare ways to confront others while helping them save face
- Examine confrontation techniques

## **Objective 9: Review active listening skills**

- Discuss hedge words people use to distort communication
- Analyze techniques people use to avoid issues
- Review assertiveness techniques

## **Objective 10: Create a code of conduct for controlling a resolution meeting**

- Apply facilitation skills for allowing everyone to be heard
- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

# Project Risk Management - 1 Day

## *PDU's - 6.5*

### *PMI's Talent Triangle Breakdown*

Technical - 5.75

Strategic - 0.75

### *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PMI-RMP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** This one-day course will teach participants how to examine and measure objectives within cost, schedule, and cultural issues. Risk for this program is examined as defining the probability of the project. This course will examine risk identification, risk communication, and risk planning. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Define risk**

- Examine sources of risk
- Define risk management
- Analyze signals of risk

#### **Objective 2: Evaluate how to confront attitudes on risk**

- List techniques for confronting risk
- Examine how to conduct a risk analysis
- Examine ranking
- Examine statistical process control
- Describe risk turmoil
- Discuss process risk
- Examine data gathering
- Explain how to evaluate plans
- Develop how to facilitate a brainstorming session
- Examine tornado diagram
- Explain a decision tree analysis
- Discuss the four strategies for negative risks

- Discuss the four strategies for positive risks

#### **Objective 3: Examine how to manage risk plans**

- Discuss transferring risk
- Examine monitoring risk
- Creating risk management plans
- Conduct an expected monetary analysis

#### **Objective 4: Define the major processes of risk management**

- Examine the process of Plan Risk Management
- Examine the process of Identify Risks
- Examine the process of Perform Qualitative Risk Analysis
- Examine the process of Perform Quantitative Risk Analysis
- Examine the process of Plan Risk Responses
- Examine the process of Implement Risk Responses
- Examine the process of Monitor Risks

# Project Risk Management - 2 Day

***PDU's - 13***

**PMI's Talent Triangle Breakdown**

Technical - 12.75

Strategic - 0.25

**PMI's Certification Breakdown**

PMP/PgMP - 13.00

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 13.00

PfMP - 0.25

PMI-PBA - 0.25

***Course Description:*** This two-day course will teach participants how to examine and measure objectives within cost, schedule, and cultural issues. Risk for this program is examined as defining the probability of the project. This course will examine risk identification, risk communication, and risk planning. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

***Course Objectives:***

**Objective 1: Define risk**

- Examine sources of risk
- Define risk management
- Analyze signals of risk
- Describe risk trade-off

- Explain how to evaluate plans
- Review interviewing
- Develop how to facilitate a brainstorming session

**Objective 2: Evaluate how to confront attitudes on risk**

- List techniques for confronting risk
- Examine how to conduct a risk analysis
- Examine ranking
- Discuss scenario
- Examine statistical process control
- Describe risk turmoil
- Discuss performance risk
- Discuss system risk
- Discuss process risk
- Examine data gathering

**Objective 3: Examine how to manage risk plans**

- Discuss transferring risk
- Examine monitoring risk

**Objective 4: Develop risk teams**

- Create a special response team

*(Continued on next page)*

## **Objective 5: Define the major processes of risk management**

- Examine the process of Plan Risk Management
- Examine the process of Identify Risks
- Examine the process of Perform Qualitative Risk Analysis
- Examine the process of Perform Quantitative Risk Analysis
- Examine the process of Plan Risk Responses
- Examine the process of Implement Risk Responses
- Examine the process of Monitor Risks

# Project Risk Management Advanced - 2 Day

*PDU*s - 14

## PMI's Talent Triangle Breakdown

Technical - 14.00

## PMI's Certification Breakdown

PMP/PgMP - 14.00

PMI-RMP - 14.00

**Course Description:** *Project Risk Management Advanced* is a two-day course which will review the basic concepts of project risk and project risk management and then dig deeper into identifying risks and strategizing solutions for those risks. Participants will explore tools and techniques for collecting, analyzing, implementing, and monitoring data and the responses to combat risk. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Review definitions of risk and project risk management**

- Appraise high-risk projects
- Identify classical causes of project risk failure
- Identify success factors for risk management
- Examine the iterative process of risk management
- Examine the risk management planning process
- Identify and detail tools and techniques for the risk management planning process
- Discuss the discovery of project risks

### **Objective 2: Define and detail tools and techniques for identifying risk**

- Describe qualitative risk analysis
- Describe quantitative risk analysis
- Assemble risks by probability and impact
- Categorize risk causes
- Define and detail data gathering tools
- Define and detail risk impact calculations

### **Objective 3: Compare risk response strategies**

- Differentiate between threats and opportunities
- Recognize risk mitigation, acceptance, transference, and acceptance
- Recognize risk opportunity strategies of exploit, share and enhance
- Define and detail tools and techniques for response identification and selection

### **Objective 4: Examine the monitoring and controlling risks process**

- Define and detail tools and techniques for monitoring and controlling risks
- Manage contingency reserves
- Collect trigger conditions, overall risk, and compliance

# Project Schedule Management - 1 Day

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Technical - 6.50

## PMI's Certification Breakdown

PMP/PgMP - 6.50

PMI-SP - 6.50

**Course Description:** This one-day course will take into account ways to plan and schedule time, as well as individual issues that affect productivity. Students will learn how to wisely confront procrastination and explore ways to better manage time issues and constraints. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### **Course Objectives:**

#### **Objective 1: Create a Work Breakdown Structure**

- Define activity attributes
- Review sequence activities
- Examine four types of activity relationships
- Describe precedence diagramming method

#### **Objective 2: Estimate Activity Resources**

- Compare resources and determine size and complexity
- Describe resource calendars
- Organize activities and estimate durations
- Develop and compare fixed driven to effort driven activities
- Evaluate the four types of estimating

#### **Objective 3: Complete a Critical Path Analysis**

- Explain the importance of a critical path
- Identify a forward and backward path for each project
- Create leads and lags
- Define critical change method

#### **Objective 4: Define the schedule management processes**

- Examine the process of Plan Schedule Management
- Examine the process of Define Activities
- Examine the process of Sequence Activities
- Examine the process of Estimate Activity Durations
- Examine the process of Develop Schedule
- Examine the process of Control Schedule



# Project Schedule Management - 2 Day

*PDU's - 13*

## PMI's Talent Triangle Breakdown

Technical - 10.00

Leadership - 3.00

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 3.00

PMI-SP - 13.00

PMI-RMP - 3.00

PfMP - 3.00

PMI-PBA - 3.00

**Course Description:** This two-day course will take into account ways to plan and schedule time, as well as individual issues that affect productivity. Students will learn how to wisely confront procrastination and explore ways to better manage time issues and constraints. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

## **Course Objectives:**

### **Objective 1: Discuss myths and realities of time management**

- Examine excuses for not managing your individual time
- Define roles and responsibilities which demand time
- Examine how to balance your time to create total human wellness in your life
- Review qualities of time management
- Define guidelines of time management

### **Objective 2: Evaluate causes of procrastination**

- Compare ways to stop procrastination
- Describe ways of dealing with deadlines
- Organize to set proper deadlines
- Develop goals to help budget your time
- Evaluate the four D's in managing time more effectively

### **Objective 3: List ways to say "No"**

- Explain how to set and establish priorities
- Identify ways to plan your work and learn how to plan
- Create ways to handle the paperwork

### **Objective 4: Discuss time tips on interruptions and decisiveness**

- Discuss time tips on the telephone in meetings
- Formulate time tips on personal habits
- Evaluate how to organize yourself

*(Continued on next page)*

## **Objective 5: Define schedule management processes**

- Examine the process of Plan Schedule Management
- Examine the process of Define Activities
- Examine the process of Sequence Activities
- Examine the process of Estimate Activity Durations
- Examine the process of Develop Schedule
- Examine the process of Control Schedule

# Project Scheduling - 2 Day

*PDU*s - 14

*PMI's Talent Triangle Breakdown*  
Technical - 14.00

*PMI's Certification Breakdown*

PMP/PgMP - 14.00

PMI-SP - 14.00

**Course Description:** *Project Scheduling* is a two-day course which will review the basic concepts of the project management process with the emphasis content being on the planning and scheduling process. Participants will explore the Schedule Development Process as diagrammed by Project Management Institute. Areas include creating a WBS, defining activities, creating a network diagram, estimating activity durations and resources, developing the schedule, and creating a baseline. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Review the basic management process**

- Construct the project planning and scheduling process
- Discuss reasons for not planning and scheduling
- Construct and detail the schedule development process

### **Objective 2: Define scheduling methods**

- Define scheduling tools
- Define schedule model
- Examine the Work Breakdown Structure (WBS)
- Define and detail activity definition
- Discuss tools and techniques for activity definition
- Define and detail activity sequencing and creating the network diagram
- Compare precedence diagramming and arrow diagramming

### **Objective 3: Define and detail estimating**

- Examine estimating tools and models
- Define and detail developing the schedule
- Discuss critical path, PERT, and GERT

### **Objective 4: Discuss duration compression - crashing and fast tracking**

- Discuss simulation tools for schedule development
- Discuss resource leveling
- Discuss critical chain
- Define the baseline schedule
- Define and detail schedule control

# Project Scope Management - 1 Day

***PDU's - 6.5***

***PMI's Talent Triangle Breakdown***

Technical - 6.25

Leadership - 0.25

***PMI's Certification Breakdown***

PMP/PgMP - 6.50

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 0.25

PfMP - 0.25

PMI-PBA - 0.25

***Course Description:*** In this one-day course, participants will focus on successful ways to control project scope. Organizations struggle with projects due to ineffective scope development and tracking. This course will ensure the ability to detail the scope and deliverables, as well as how to handle changes to the scope. This course will also include project life cycle, project definition, project baselines, and using the work breakdown structure. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

***Course Objectives:***

**Objective 1: Create interview strategies to gather project requirements**

- Create questions which explore the customer's desires and requirements
- Identify ways of asking questions which open up communication
- Analyze the interview data and determine true requirements of the customer
- Brainstorm how to set project objectives that are measurable and realistic

**Objective 2: Create scope requirements for the project**

- Discuss how to interview the client
- Describe how to define the work

**Objective 3: Create a Work Breakdown Structure**

- Examine characteristics of a milestone
- Examine schedule issues
- Discuss schedule for multiple projects
- Discuss schedule for individual projects
- Examine scheduling changes and adjustments
- Discuss controlling the schedule

**Objective 4: Evaluate a real timeline**

- Evaluate why time calculations are wrong

**Objective 5: Analyze strengths and weaknesses of a Gantt chart**

- Define the critical path
- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Discuss effects of a late start

# Project Scope Management - 2 Day

*PDU*s - 13

*PMI's Certification Breakdown*

PMP/PgMP - 13.00

*PMI's Talent Triangle Breakdown*

Technical - 13.00

**Course Description:** In this two-day course, participants will focus on successful ways to control project scope. Organizations struggle with projects due to ineffective scope development and tracking. This course will ensure the ability to detail the scope and deliverables, as well as how to handle changes to the scope. This course also includes project life cycle, project definition, project baselines, and using the work breakdown structure. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Create scope requirements for the project**

- Discuss how to interview the client
- Describe how to define the work

**Objective 2: Create a Work Breakdown Structure**

- Examine characteristics of a milestone
- Examine schedule issues
- Discuss schedule for multiple projects
- Discuss schedule for individual projects
- Examine scheduling changes and adjustments
- Discuss controlling the schedule

**Objective 3: Assemble brainstorming and planning meetings**

- Create a modified code of conduct for running an empowered team

**Objective 4: Examine forms in scheduling a project and possible scheduling issues**

- Discuss how to track multiple projects

**Objective 5: Evaluate a real timeline**

- Evaluate why time calculations are wrong

**Objective 6: Analyze strengths and weaknesses of a Gantt chart**

- Define and develop a critical path
- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Discuss effects of a late start

**Objective 7: Examine steps to create a project budget and develop a master budget control process**

- Discuss implementation of a project plan

# Project Stakeholder Management - 1 Day

*PDU*s - 6.5

**PMI's Talent Triangle Breakdown**

Technical - 5.50

Leadership - 1.00

**PMI's Certification Breakdown**

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-SP - 6.50

PMI-RMP - 6.50

PfMP - 6.50

PMI-PBA - 6.50

**Course Description:** This course will explore project stakeholder management. Participants will identify the stakeholder management processes and explore tools and techniques for the successful implementation of each process. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Identify the project stakeholder management processes**

**Objective 2: Examine the process of Identify Stakeholders**

**Objective 3: Examine the process of Plan Stakeholder Engagement**

**Objective 4: Examine the process of Manage Stakeholder Engagement**

**Objective 5: Examine the process of Monitor Stakeholder Engagement**

**Objective 6: Define and apply analytical tools and techniques in the stakeholder management processes**

**Objective 7: Define and apply communication methods in the stakeholder management processes**

**Objective 8: Examine interpersonal skills and management skills in the stakeholder management processes**

**Objective 9: Define and apply information management systems in the stakeholder management processes**

**Objective 10: Examine tools and techniques for monitoring and evaluating stakeholder engagement**

**Objective 11: Identify traits for stakeholder management success**

# Role & Responsibility of a Business Analyst in an Agile Methodology - 1 Day

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Technical - 6.50

## PMI's Certification Breakdown

PMP/PgMP - 6.50

PMI-ACP - 6.50

PMI-PBA - 6.50

**Course Description:** Agile Project Management officially began in 2001 and has become a popular project management approach. This course will focus on how to interact with the customer in an agile framework to show value. The Business Analyst must use specific skills to actively involve the customer in delivering features and functionality throughout each iteration of the project. This presentation will explore actions which reinforce the ability to respond to a changing project environment while focusing on delivering high customer value in every project.

**Method of teaching:** Students will use discussion, cases, and group activities to facilitate the course.

### **Course Objectives:**

#### **Objective 1: Define Agile Project Management and the Agile manifesto**

- Compare why traditional projects struggle and fail
- Discuss criteria on when to use the Agile methodology
- Identify the success factors of Agile Project Management
- Identify the principles of Agile Project Management
- Compare predictive planning and adaptive planning

#### **Objective 2: Review how to use daily stand up meetings successfully**

- Examine the role of Business Analyst in the Agile Project Environment
- Examine the role and core skills of the project manager in Agile Project Management
- Examine the role of the culture to support the project team in Agile Project Management

# Successful Negotiation in a Project Management Environment - 1 Day

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Technical - 3.5

Leadership - 2.75

Strategic - 0.25

## PMI's Certification Breakdown

PMP/PgMP - 6.5

PMI-ACP - 3.00

PMI-SP - 3.00

PMI-RMP - 3.00

PfMP - 3.00

PMI-PBA - 3.00

**Course Description:** This one-day course will examine the strategies of successful negotiation throughout the project's lifecycle. Participants will learn the value of successful negotiation, the negotiation process, and different negotiation models. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

## **Course Objectives:**

### **Objective 1: Define negotiation**

- Identify the benefits of negotiations
- Detail types of negotiation in organizations
- Define and detail negotiations in projects including interpersonal negotiations and contract negotiations

### **Objective 3: Examine the negotiation process**

- Define preparing for a negotiation
- Examine how to create a proposal
- Define types of bargaining
- Examine closing a negotiation

### **Objective 2: Examine personality traits of negotiators**

- List core skills for successful negotiation
- Examine negotiating mistakes
- Examine negotiating strategies
- Recognize common ploys used in negotiation
- Identify deceptive behaviors used in negotiation



# Successful Negotiation in a Project Management Environment - 2 Day

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 6.75  
Leadership - 6.00  
Strategic - 0.25

## PMI's Certification Breakdown

PMP/PgMP - 13.00  
PMI-ACP - 6.25  
PMI-SP - 6.25  
PMI-RMP - 6.25  
PfMP - 6.25  
PMI-PBA - 6.25

**Course Description:** This highly interactive two-day course will examine the strategies of successful negotiation throughout the project's life cycle. Participants will learn the value of successful negotiation, the negotiation process, and different negotiation models. This course will include examples in negotiation over scope, deadlines, change, and getting the best price from your vendor. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

### **Course Objectives:**

#### **Objective 1: Define negotiation**

- Identify the benefits of negotiations
- Define and detail negotiating skills for project managers
- Define and detail negotiations in projects including interpersonal negotiations and contract negotiations

#### **Objective 2: Examine the negotiation process**

- List and examine negotiation strategies
- Examine preparation techniques for negotiation
- Discuss how to lead the negotiation process

#### **Objective 3: Recognize how to deal with the other party's negative tactics**

- Examine how to align the support of others before, during and after the negotiation
- Identify communication skills needed for successful negotiation
- Analyze win-win negotiations
- Create strategies for controlling conflict in negotiation
- Apply negotiation to resolve conflict

#### **Objective 4: Develop how to negotiate with your project team**

- Discover negotiation skills for purchasing
- Examine how to use BAFO to your advantage

# Use Case Modeling - 2 Day

*PDU*s – 13

*PMI's Certification Breakdown*

PMP/PgMP - 13.00

*PMI's Talent Triangle Breakdown*

Technical - 13.00

**Course Description:** This hands-on, interactive two-day course will help participants examine the fundamentals of Use Case Modeling and its application for gathering requirements in the project life cycle. This course will present extensive, iterative Use Case Modeling methodology, including identification, development, and implementation. Students will participate in Use Case processes, examine the importance/impact of Use Cases, and gain the skills necessary to utilize Use Case Modeling effectively as a requirements gathering tool.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Discuss the importance of gathering requirements in project management**

- Define what constitutes a quality requirement and what purpose it serves
- Examine guiding principles for gathering quality requirements
- Examine the challenges of effective requirements gathering
- Examine classic mistakes made in gathering requirements
- Examine the difference between functional and non-functional requirements
- Discuss the “black box” mentality of users and its implications on requirements gathering
- Compare/Contrast software development project life cycle models
- Examine the “4+1” view of software architecture
- Compare/Contrast traditional requirements gathering techniques with Use Case Modeling

**Objective 2: Examine the history and evolution of Use Case Modeling**

- Examine the benefits of Use Case Modeling
- Define who benefits from Use Case Modeling
- List the goals of Use Cases
- Define Use Case Diagrams and their purpose
- Compare/Contrast Use Cases, Use Case Diagrams, and scenarios
- Define scenarios and paths as they relate to Use Cases and Use Case Diagrams

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**Objective 3: Examine important components needed in gathering requirements including the mission, vision, values, SOW, risk analysis, prototypes, use cases, glossary, constraints, and business rules catalog**

- Examine the Use Case Template and its components
- Define Use Case components including users, basic path, alternative path, exception path, extension points, triggers, assumptions, preconditions, post-conditions, and author

**Objective 4: Examine how to use a Use Case Modeling Workshop in Use Case development**

- Define the use of iterative and incremental approaches to Use Case Modeling
- Examine three types of iterations in Use Case Modeling (Façade, Filled, & Focused)
- Discuss the objective, steps, tools, and deliverables of the Façade Iteration
- Discuss the objective, steps, tools, and deliverables of the Filled Iteration
- Discuss the objective, steps, tools, and deliverables of the Focused Iteration
- Discuss the purpose of stereotypes (extend and include) in specializing Use Cases
- Define supporting artifacts to Use Cases such as packages, components, and class models
- Examine the benefits to requirements traceability using Use Case Modeling
- Compare/Contrast Use Cases and Test Cases
- Discuss how to manage Use Case influenced projects by requirements rather than tasks
- Examine the application of Use Cases to non-requirement gathering activities

# Vendor Management - 1 Day

***PDU***s – 7.0

**PMI's Talent Triangle Breakdown**

Technical - 4.00  
Leadership - 1.00  
Strategic - 2.00

**PMI's Certification Breakdown**

PMP/PgMP - 7.00  
PMI-ACP - 5.00  
PMI-SP - 3.00  
PMI-RMP - 3.00  
PfMP - 3.00  
PMI-PBA - 3.00

**Course Description:** This one-day course will give foundational skills to workers who are overseeing contractors. Participants will learn ways to hold contractors accountable to the terms and conditions of the contract. Students will improve knowledge and competencies of staff in vendor management, increase tools in dealing with low performance vendors and remedy the lack of performance, and understand the need to document specific events when a vendor does not comply with contract. Participants will also discover why and how building relationships with a vendor can payoff throughout the management of the contract.

**Method of teaching:** *Lecture, cases, and team discussions.*

**Course Objectives:**

**Objective 1: Discuss vendor challenges**

- Examine the future of vendor relationships
- Compare purchaser and vendor motivations
- Compare the pros and cons of outsourcing a project to a vendor
- Discuss reasons for vendor relationships
- Examine the real world of culture and language
- Evaluate how vendor management can benefit organizations

**Objective 2: Award Contract**

- Vendor orientation
- Vendor management plan
- Vendor measurements or scorecard
- Vendor performance
- Negotiation strategies used by vendors
- Strengths and weaknesses of contract types

**Objective 3: Contract management**

- Work plan to fulfill statement of work
- Benchmarks
- Communication
- Status and performance meetings
- Types of audits
- Auditing process
- Difference between internal, external, and third party auditing
- Areas for the auditing examination
- Best practice guide sheet for auditing
- Process designs for auditing the vendor
- Auditing Plan
- Ethical standards and procurement integrity

*(Continued on next page)*

- Internal and vendor project manager relationships
- Vendor conflicts and how to resolve them
- Contract modifications
- Contract disputes
- Contract termination for convenience
- Procedures for termination for convenience
- Contract termination for default
- Procedures for termination for default

## **Objective 4: Contract closure**

- Knowledge transfer
- Vendor/customer handoff
- Contract closeout
- Steps in contract closeout

# Vendor Management - 3 Day

## *Managing, Monitoring and Controlling*

### *Vendor Relationships*

***PDU's – 19.5***

**PMI's Talent Triangle Breakdown**

Technical - 15.75  
Leadership - 1.25  
Strategic - 2.50

**PMI's Certification Breakdown**

PMP/PgMP - 19.50  
PMI-ACP - 3.75  
PMI-SP - 3.75  
PMI-RMP - 4.50  
PfMP - 3.75  
PMI-PBA - 3.75

***Course Description:*** This three-day course will provide detailed instruction in areas such as pre-solicitation, solicitation, and award of a contract. Each participant will develop tools for working with vendors, a clear understanding of vendor motivation, and techniques for making it a win-win relationship. This course will focus on ways to select, monitor, and control vendors, as well as how to make vendors a partner or an extension as stakeholders who deliver the right performance throughout the length of the project. In addition, this course will focus on all aspects of vendor management, such as developing vendor management plans, identifying performance measurements and discussing various contract types and their strengths and weaknesses.

***Method of teaching: Lecture, cases, and team discussions.***

***Course Objectives:***

**Objective 1: Discuss vendor challenges**

- Examine the future of vendor relationships
- Compare purchaser and vendor motivations
- Compare the pros and cons of outsourcing a project to a vendor
- Discuss reasons for vendor relationships
- Examine the real world of culture and language
- Evaluate how vendor management can benefit organizations

**Objective 2: Examine phases in the acquisition process**

- Explain the duties of the contract officer
- Identify best practices of vendor management

- Discuss reasons and roles for a Vendor Management Office
- Compare the procurement cycle to project management
- Compare organizational and government procurement processes

**Objective 3: Examine 5 phase process of vendor management**

- **Phase one: Pre-Award Stage**
  - Forecasting future requirements
  - Acquisition planning

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- Project scope statements
  - Make or buy discussion
  - Baseline estimated cost
  - Successful steps for creating an effective RFP
  - Examine what impacts the RFP process
  - Basic parts of the RFP
  - Designing a statement of work
  - Key elements of a performance work statement
  - Methods of contract surveillance
- **Phase two: Source selection**
- Techniques on setting expectations with vendor
  - Vendor risk
  - Conducting a risk analysis of each vendor
  - Risk sharing
  - Criteria for evaluating the vendors
  - Vendor evaluation process
  - Sealed bidding process
  - Success criteria for evaluating vendors
  - Qualifications for vendor selection
- **Phase three: Award Contract**
- Vendor orientation
  - Vendor management plan
  - Vendor measurements or scorecard
  - Vendor performance
  - Negotiation strategies used by vendors
  - Strengths and weaknesses of contract types
- **Phase four: Contract management**
- Work plan to fulfill statement of work
  - Benchmarks
  - Communication
  - Status and performance meetings
  - Types of audits
  - Auditing plan
  - Internal and vendor project manager relationships
  - Auditing process
  - Difference between internal, external and third party auditing
  - Areas for the auditing examination
  - Vendor conflicts and how to resolve them
  - Best practice guide sheet for auditing
  - Process designs for auditing the vendor
  - Monitoring contractor requests for payment
  - Contract modifications
  - Contract termination for convenience
  - Procedures for termination for convenience
  - Contract termination for default
  - Procedures for termination for default
  - Contract disputes
  - Ethical standards and procurement integrity
- **Phase five: Contract closure**
- Knowledge transfer
  - Vendor/customer handoff
  - Contract closeout
  - Steps in contract closeout

# Project Management 90 Hour Intensive Overview

## Overview

**Course Description:** This intensive 90-hour course will focus on ways employees can run projects faster and more effectively. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path, as well as how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts.

*The 90-hour intensive is broken down into the following three courses. Each course is designed to be taught in four and a half days. Below, each of the three courses will be broken down, showing an overview, description of each course, and detailed objectives to demonstrate what will be taught.*



# Project Management I - 4 1/2 Day

## *Initiating, Planning, Integration and Staffing*

***PDU's - 30***

### **PMI's Talent Triangle Breakdown**

Technical - 19.50  
Leadership - 4.00  
Strategic - 6.50

### **PMI's Certification Breakdown**

PMP/PgMP - 30.00  
PMI-ACP - 10.50  
PMI-SP - 10.50  
PMI-RMP - 10.50  
PfMP - 10.50  
PMI-PBA - 10.50

***Course Description:*** Participants will begin their journey into project management concepts, theories, and foundational processes. The focus in this course will be on scheduling, creating a work breakdown structure, and planning for human resource needs. In planning for human resource needs, participants will study behavioral skills that will help motivate, equip, and keep project team members accountable and on task. This is the foundational course specifically designed to align with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content, as well as best practices which will be taught from the Best Practice Manual.

***Methods:*** Students will use discussion, cases, and group activities to facilitate the course.

### ***Course Objectives:***

#### ***Initiating and Planning***

##### **Objective 1: Define the six-step project management process**

- Examine the project's life cycle
- Recognize five ways to give proper leadership within culture
- Design an agenda for the first project team meeting
- Identify the triple constraints of every project
- Define the project drivers
- Demonstrate interviewing techniques that will assist in determining project specifics
- Review constraint red flags to watch
- Show how to set, control, and monitor project scope
- Summarize major areas to brainstorm

##### **Objective 2: Classify who to place on your project team**

- Label role descriptions and project responsibilities when you have no position power
- Create a modified code of conduct for running an empowered team

##### **Objective 3: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a WBS, work breakdown structure
- Discuss how to track multiple projects
- Evaluate a real time line

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- Evaluate why time calculations are wrong
- Examine characteristics of a milestone
- Analyze strengths and weaknesses of a Gantt chart

## **Objective 4: Define the critical path**

- Evaluate the strengths and weaknesses of a critical path
- Examine how to handle delays
- Discuss effects of a late start
- Examine steps in creating a project budget and developing a master budget control process
- Discuss implementation of project plan

## ***Communication Module***

### **Objective 5: Analyze the value of project interviews**

- Identify perception
- Examine what impacts project perception
- Discuss how to gain understanding
- Demonstrate what to do when you mess up

### **Objective 6: Analyze communication styles**

- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult

### **Objective 7: Identify questions to ask if miscommunication is common**

- Predict obstacles of listening during projects

### **Objective 8: Define project management's role in project meetings**

- Describe ingredients of effective project meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback
- Compare techniques for disagreeing
- Discuss caution signs that a disagreement is turning into a conflict
- Describe ways to reduce intergroup conflict in project meetings

### **Objective 9: Examine communication requirements**

- Identify communication processes
- Create communication plan for standard project

## ***Project Integration Management***

### **Objective 10: Examine the integration process in project management**

- Examine integration skills needed by the project manager

### **Objective 11: Define the processes in Project Integration Management**

- Examine the process of Develop Project Charter
- Examine the process of Develop Project Management Plan
- Examine the process of Direct & Manage Project Work
- Examine the process of Manage Project Knowledge

*(Continued on next page)*

- Examine the process of Monitor & Control Project Work
- Examine the process of Perform Integrated Change Control
- Examine the process of Close Project or Phase

- Examine professional ways to handle the negative participant
- Analyze assertiveness techniques to be used by facilitators
- Formulate a standard preparation plan for starting facilitation
- Examine best ways to be prepared for facilitation sessions
- Discuss best practices for ending a facilitation session

## ***Project Facilitation Module***

### **Objective 12: Discuss the definition of project facilitation**

- Evaluate benefits of facilitation and how it will help your organization
- Discuss facilitation mess-ups during projects
- Examine the creation and usage of a code of conduct for the session
- Assess core duties which facilitators must do before, during and after a facilitation session
- Discuss best practices for setting meeting objectives and goals

### **Objective 13: Analyze body language and tone of voice which individuals use to communicate**

- Examine ways to clarify body language of others
- Discuss five useful ways for brainstorming during projects
- Analyze the proper usage of questions to engage the audience
- Formulate paraphrasing techniques for clarifying the meaning and message of others
- Compare different ways to use probing, bridging and redirecting skills
- Discuss the positives of having a devil's advocate in project teams

### **Objective 14: Describe the role and functions of a recorder in project teams**

- Discuss best practices for the recorder and creating minutes for determined actions
- Design rules for when using a buddy system during a facilitation session

### **Objective 15: Analyze tactics for handling resistance in project meetings**

- Evaluate the impact of conflict to the participants

## ***Project Schedule Management Module***

### **Objective 16: Discuss myths and realities of time management**

- Examine excuses for not managing your individual time
- Define roles and responsibilities which demand time
- Examine how to balance your time to create total human wellness in your life

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## **Objective 17: Review qualities of time management**

- Define guidelines of time management

## **Objective 18: Describe ways of dealing with deadlines**

- Organize to set proper deadlines
- Create goals to help budget your time
- Evaluate the four D's in managing time more effectively
- List ways to say "No"
- Explain how to set and establish priorities
- Identify ways to plan your work and learn how to plan
- Discuss time tips on interruptions and decisiveness
- Discuss time tips on the telephone and in meetings

### ***Managing Team Module***

## **Objective 19: Analyze job responsibilities**

- Discuss a priority checklist
- Assess modern day accountability myths

## **Objective 20: Evaluate how to coach the project team toward success**

- Develop workers with new skills
- Identify vision through leadership
- Examine strategies for creating trust
- Define ways to equip and empower
- Discuss values of successful coaching of project teams
- Analyze common coaching mistakes of project teams

## **Objective 21: Contrast different change strategies**

- Classify why project teams block change
- Choose ways to reduce project team resistance
- Evaluate changes which support goals
- Develop core values

## **Objective 22: Describe requirements for being an overcomer on project teams**

- Analyze two types of motivation within a project team
- Examine ways to align motivational techniques to workers
- Analyze the disciplining of project team members and ways for changing behavior
- Identify how to track project team members

## ***Project Management I Best Practices***

### **PROJECT MANAGEMENT OVERVIEW INTRODUCTION**

- Project Management Methodology Concept
- What is a Project?
- Roles and Responsibilities
- Planning Process

### **PROJECT INITIATING AND CONCEPT DEVELOPMENT**

- What is Project Management Methodology?
- Project Management is an Iterative Process
- Applicability of the Methodology
- Tailoring of the Methodology to Specific Project and Specific Organizations
- Continual Improvements

*(Continued on next page)*

## WHAT IS A PROJECT?

- What is a Project?
- Temporary Process
- Well-Defined Goals
- Project Constraints
- What is Project Management?

## ROLES AND RESPONSIBILITIES

- Roles and Responsibilities
- Who is Part of the Project Team?
- Importance of Stakeholders
- Project Manager
- Project Sponsor
- Steering Committee
- Development Team
- Change Management
- Quality Assurance
- Customer
- Project Review Team Management
- Division of Purchases

## PLANNING PROCESS

- The Evolving Plan
- The Planning Process
- Planning in the Initiating Phase
- Planning in the Planning Stage
- Planning in the Project Start-up Stage
- Planning in the Project Execution Stage
- Planning in the Project Close-Out Stage

## PROJECT INITIATING AND DEFINITION INTRODUCTION

- The Initiating Phase
- Elements of the Initiating Phase
- Project Management Phases
- Business Case/Project Statement
- Enterprise Projects or Programs
- Business Analysis
- Concept Review
- The Concept Atmosphere
- Problems during the Initiating Phase

## BUSINESS CASE

- Elements of the Business Case/Project Statement
- Who Does What
- How Should the Business Case/Project Statement be Developed
- A Plan for Planning
- Time frame for Completion
- Business Case Form
- Alternate Approaches to the Preparation of a Business Case
- Level of Detail
- Recommended Formats for Three Levels of Business Case
  - A. Business Case for a Mini Project
  - B. Business Case for a Medium Sized Project
  - C. Business Case for a Very Large Project

# Project Management II - 4 1/2 Day

## *Budgeting, Quality, Change, Risk and Start-up*

***PDU***s- 30

### **PMI's Talent Triangle Breakdown**

Technical - 18.00  
Leadership - 2.50  
Strategic - 9.50

### **PMI's Certification Breakdown**

PMP/PgMP - 30.00  
PMI-ACP - 15.00  
PMI-SP - 12.00  
PMI-RMP - 17.00  
PfMP - 12.00  
PMI-PBA - 12.00

**Course Description:** Participants will focus on additional planning of the project while examining issues such as risk, budgeting, and how to maintain quality throughout the project. Specifically, this course will focus on conducting risk analysis, problem solving, handling conflict, and maintaining quality throughout the entire project. In Phase II, when planning the budget, quality and risk are aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content, as well as best practices which will be taught from the Best Practice Manual.

**Methods:** Students will use discussion, cases, and group activities.

### ***Course Objectives:***

#### ***Budgeting, Quality, Change, Risk and Start-up***

#### **Objective 1: Identify quality processes which maintain high quality**

- Review the Deming ideas on quality
- Evaluate ways to calculate cost
- Create a risk identification matrix
- Describe ways reduce risk
- Analyze ideas on maintaining high quality
- Identify change processes and procedures
- Examine change control systems

#### ***Quality Module***

#### **Objective 2: Compare old and new philosophies in project management**

- Define quality for today's projects
- Identify a prevention mentality rather than a reactive one
- Evaluate data that must be analyzed

#### **Objective 3: Set guidelines for executing continuous quality through the project**

- Examine continuous process improvement for project processes
- Develop rules for continuous improvement
- Analyze where continuous improvement can help
- Discuss symptoms of quality concerns in past and future projects
- Design a continuous improvement project team's concern
- Judge ways to reduce resistance from organizational culture
- Compare roadblocks to continuous improvement and quality initiative

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## **Objective 4: Predict characteristics to the cost of quality in projects**

- Choose techniques for involving co-workers
- Evaluate Deming's seven deadly diseases
- Identify Juran's six-step approach to quality
- List steps for creating a quality action plan in projects
- Discuss implementation of the quality action plan
- Examine ways of monitoring the quality action plan
- Identify the strengths and weaknesses of Gantt charting
- Discuss the strengths and weaknesses of CPM charting

### ***Project Cost Management***

#### **Objective 5: Examine budgeting basics**

- Review estimating techniques
- Discuss the pre-estimating process
- Evaluate constraint estimating
- Discuss Expert estimating
- Analyze cost projections
- Detail the problem
- Examine estimating the initial cost
- Discover how to figure ROI on your project
- Define the processes of Plan Cost Management
- Examine the process of Estimate Costs
- Examine the process of Determine Budget
- Examine the process of Control Costs

### ***Project Risk Management***

#### **Objective 6: Define risk**

- Examine sources of risk
- Define risk management
- Examine how to conduct risk analysis

- List techniques to confronting risk
- Examine ranking

#### **Objective 7: Discuss performance risk**

- Discuss system risk
- Discuss process risk
- Discuss transferring risk
- Define risk management

#### **Objective 8: Define the processes of Project Risk Management**

- Examine the process of Plan Risk Management
- Examine the process of Identify Risks
- Examine the process of Perform Qualitative Risk Analysis
- Examine the process of Perform Quantitative Risk Analysis
- Examine the process of Plan Risk Responses
- Examine the process of Implement Risk Responses
- Examine the process of Control Risks

### ***Problem Solving Module***

#### **Objective 9: Classify who should be on the problem solving team**

- Evaluate why participation helps solve the problem faster
- Discuss benefits of problem solving analysis in projects
- Review what influences the problem solving experience in projects
- Define the problem solving processes for successful projects
- Assess the resources needed to fulfill the problem solving plan

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## **Objective 10: Examine creative solutions in solving project plans**

- Compare what to do if you inherit a goofy solution
- Perform a SWOT Analysis
- Evaluate the four steps to Force Field Analysis
- Discuss the benefits of Force Field Analysis

## **Objective 11: Define contingency planning and examine the crisis correctly**

- Evaluate how to implement the solution
- Discuss 7 keys to problem solving implementation
- Identify the 7 reasons for implementation failure

### *Change Module*

## **Objective 12: Discuss the definition of change**

- Analyze why people resist change
- Evaluate four types of change
- Examine five roles of change agents
- Explain the drivers of change
- Assess five new focuses from change
- Examine six ways fear hinders change
- Evaluate seven qualities of a paralyzed state
- Evaluate when to create change quickly or gradually
- Formulate a checklist to help determine resistance
- Identify how to deal with setbacks

## **Objective 13: Create a strategy for change**

- Analyze a force field analysis
- Create an action plan

## **Objective 14: Compare change control to change management**

- Discuss what is included in integrated change control
- Explain tools for integrated change control
- Discuss the benefits for written change requests
- Examine schedule changes

## **Objective 15: Examine scope change control**

- Examine cost change control
- Create change management processes
- Create change due to corrective actions
- Create change due to preventative actions

## **Objective 16: Discuss how to monitor and verify changes have been completed**

- Discuss change authorization policies
- Analyze the impact of change
- Define change control board
- Discuss best practices for change control board

## ***Project Management II Best Practices***

### **PROJECT MANAGEMENT PLANNING**

- Responsibilities
- Terminology

### **PLANNING PROCESS AND PROJECT PLAN**

- What is Project Planning
- The Planning Process
- Importance of the Project Plan
- Steps in the Planning Process
- Overview of Project Scheduling

*(Continued on next page)*



## **ACTIVITY DEFINITION AND SEQUENCING**

- Develop Project Tasks
- Define Task Relationships
- Defining Deliverables
- Development of a Project Schedule
- Define Precise and Measurable Milestones
- Steps to Creating a Project Schedule
- Estimate Task Duration
- Define Priorities
- Define Critical Path
- Document Task Relationship
- Document Assumptions
- Review the Results

## **BUDGETING**

- Overview of Project Budgeting
- Identify Cost Factors
- Project Estimate Summary Worksheet
- Instructions for the Project Estimate Summary Worksheet
- Document Assumptions
- Review the Cost Estimates
- Estimated Cost at Completion Report

## **CHANGE MANAGEMENT**

- Change Management
- Change Management Organization
- Change Management Plan
- Tasks During the Planning Phase
- Relationship to Quality Management
- Authority and Responsibility
- Control Items
- Change Management Procedures
- Storage of Control Items

## **QUALITY PLANNING**

- Quality Process
- Creating the Quality Plan
- Responsibility for Quality
- Independence of the Quality Assurance Team
- Checklist
- References

## **REQUIREMENTS DEFINITION**

- Importance of Project Requirements
- When are Requirements Defined?
- Requirements Specifications
- Who Defines Requirements?
- Approvals
- Managing Requirements Changes

## **RESOURCE PLANNING**

- Overview of Resource Planning
- Determining the Size of the Team
- Determining Required Skills
- Identifying Required Non-Labor Assets
- Define Resource Profiles
- Forming the Team
- Support Functions
- Define Assumptions

## **RISK MANAGEMENT PLAN**

- Identify Risks
- Risk Management Process
- Responsibility for Risk Identification
- Risk Management Worksheet Instructions
- Contingency Planning
- Risk Management Worksheet Sample
- Suggested Preventive and Contingency Measures
- Risk Identification Summary (Top Five Risk)

*(Continued on next page)*

## PROJECT PLAN FORMAT

- The Project Plan Template
- Plan Approval
- Project Summary
- Project Charter
- Project Trade Off Matrix and Status Summary
- Project Organization
- Activity List / Work Breakdown Structure
- Work Product Identification
- Project Schedule
- Estimated Cost at Completion
- Resource Loading Profiles
- Requirements
- Risk Management Plan
- Change Management Plan
- Quality Plan
- Top Five Issues
- Issue Item Status
- Action Item Status

# Project Management III - 4 1/2 Day

## *Execution, Monitoring, and Close Down*

***PDU's - 30***

***PMI's Talent Triangle Breakdown***

Technical - 9.25  
Leadership - 5.75  
Strategic - 15.00

***PMI's Certification Breakdown***

PMP/PgMP - 30.00  
PMI-ACP - 20.75  
PMI-SP - 20.75  
PMI-RMP - 20.75  
PfMP - 20.75  
PMI-PBA - 20.75

***Course Description:*** Participants will focus on monitoring and executing the project while moving into the close down phase of the project. Additional focus will be on delivering quality customer service and value, regardless of if the customer is internal or external. Participants will discuss and participate in analysis of measuring the individual performance of team members. This section also focuses on how to properly hand the project off to the customer for effective transition. Phase III is aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content, as well as best practices which will be taught from the Best Practice Manual.

***Methods:*** Students will use discussion, cases, and group activities.

***Course Objectives:***

**Objective 1: Describe ways to execute and monitor the project process**

- Classify how to manage the project and negotiate various agreements
- Summarize execution dangers to consider
- Design performance methods for tracking and monitoring
- Examine high conflict considerations
- Assess how to procure vendors for a project
- Apply close down checklists and handoff procedures
- Perform a postmortem and lessons learned

***Execution Module***

**Objective 2: Discuss the benefits of execution**

- Analyze a project execution methodology
- Identify the seven executing processes
- Assess the influences of managing in execution
- Review the hindrances to project execution
- Analyze escalation processes and policies

***Negotiation Module***

**Objective 3: Analyze the benefits of negotiations**

- Examine killer mistakes in negotiations
- Evaluate three ways of bargaining
- Discuss the three views of preparation
- Identify techniques for personal preparation
- Assess preparation techniques to counter your opponent

*(Continued on next page)*

## **Objective 4: Design and arrange the first session**

- Review how and why to set parameters in project negotiations
- Classify techniques for handling emotionally charged issues
- Identify standard negotiation funneling practices
- Design questions that benefit your position while working on projects
- Discuss words to use in the questions for greater impact

## **Objective 5: Analyze barriers to overcome during negotiations**

- Identify guidelines for examining the opponent's position
- Evaluate research techniques for checking out the opponent

## **Objective 6: Examine ways to overcome price objections in project resources**

- Discuss the benefits of reinforcing price before negotiations
- Analyze standard negotiation strategies
- Identify techniques to use to follow up after the deal is made

### *Customer Service Module*

## **Objective 7: Compare customer expectations to customer deliverables**

- Define customer service for both internal and external customers in projects
- Evaluate customer expectations for projects
- Examine top customer complaints

## **Objective 8: Identify how to build credibility with customers**

- Assess how to bond with customers
- Choose distinct connections every customer must receive

## **Objective 9: Analyze unspoken signals which distort communication**

- Recognize how to put active listening to work

## **Objective 10: Choose ways for handling problem customers**

- Review methods for calming down irate customers
- Discuss feedback systems that work in projects
- Analyze warning signals that customer service is dying
- Identify five ways to improve your customer service in every project

### *Performance Module*

## **Objective 11: Discuss advantages of performance management**

- Identify performance needs
- Identify performance to project directives

## **Objective 12: Classify benchmarking techniques of present performance**

- Discuss training and the performance gap
- Examine questions to ask in determining project performance
- Discuss how to break down project performance into understandable steps

*(Continued on next page)*

**Objective 13: Review monitoring of project performance indicators**

- Show how to link operational goals to project performance
- Analyze mentoring roles in advancing project performance
- Examine the impact of incorporating best practices in project performance
- Evaluate how to create a project performance results matrix
- Develop a project performance development plan to transition team members toward peak performance

**Conflict Module**

**Objective 14: Discuss the positive side of conflict**

- Define conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers
- Develop rules for handling anger
- Create action plans for quick resolution

**Objective 15: Analyze hostility and how it surfaces**

- Examine how to handle personal and professional hostility
- Compare levels of group conflict

**Objective 16: Discuss hedge words people use to distort communication**

- Analyze techniques people use to avoid issues

**Objective 17: Create a code of conduct for controlling a resolution meeting**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques

**Procurement Module**

**Objective 18: Examine contracting process**

- Discuss methods of contracting

**Objective 19: Compare contracting types**

- Describe evaluating and awarding contracts
- Discuss how to conduct a search for contract source

**Objective 20: List price and budgeting requirements**

- Examine interpreting changes
- Analyze the termination of contracts
- Discover how to handle appeals, disagreements in a contract
- Examine contract closeout planning

**Project Management III Best Practices**

**INTRODUCTION TO EXECUTION**

- What Happens During Project Execution?
- Project Control Process
- Preventing Problems is Better than Fixing Them

**APPROVAL PROCESS**

- What is the Approval Process?
- Contractor Payments

**CONFIGURATION MANAGEMENT CHANGE, VERSION AND ISSUE**

**MANAGEMENT**

- What Happens During Project Execution?
- You Can't Manage What You Don't Control
- The Change Control Form
- Phase 1 - Requester Information
- Phase 2 - Initial Review of the Change Request

*(Continued on next page)*

Phase 3 - Initial Impact Analysis  
Phase 4 - Final Review Results and Change  
Priority

- What is Issue Management
- The Issue Resolution Form

Phase 1 - Requester Information

Phase 2 - Initial Review of the Issues

Phase 3: Tracking

Phase 4: Final Review Results and Change  
Priority

- Why Tracking and Monitoring?
- How and What is to be Tracked
- When Should Tracking be Done?
- Activity and Schedule Tracking
- Monitoring
- Planned Versus Actual Costs
- Cost
- Update the Cost Model
- Document Assumptions
- Tracking and Monitoring Costs
- Estimate at Completion (EAC) Summary Report
- Financial Metrics
- Resource Loading Updates
- Steering Committee
- Continued on next page
- Independent Reviews
- Periodic Updates
- Managing External Project Managers

## **CORRECTIVE ACTIONS**

- The Best of Plans Can Go Wrong
- Where Problems Come From
- Fix the Problem with a Recovery Plan

## **PROJECT REVIEWING**

- Review Process
- Informal Review Process
- The Status Review
- Team Meetings
- Executive Meeting
- Link to Change, Issue and Quality Management

## **RISK MONITORING AND MITIGATION**

- Preventing Problems
- What is After Risk Assessment?
- The Evolution of Risk Control
- Risk Monitoring is an Iterative Process
- Risk Manager
- Risk Meetings
- Ongoing Risk Identification
- Focus on Key Risk
- Risk Resolution
- Historical Record

## **TRACKING AND MONITORING**

### **PROJECT PERFORMANCE**

- Introduction to Project Tracking and Monitoring
- The Project Plan as the Road Map
- The Project Plan as the Baseline

## **PROJECT CLOSE-OUT**

### **INTRODUCTION**

- Overview

## **POST-IMPLEMENTATION**

### **EVALUATION REPORT AND**

### **ARCHIVING**

- What is a Post Implementation Evaluation Report?
- Identifying and Addressing Success
- Who Prepares the Report?
- Collecting Project Data
- Where is the Archive Maintained
- How is the Archived Material Used?

## **RECOGNITION AND CELEBRATION OF**

### **SUCCESS**

- Recognition of Success
- What is Success?
- Conduct a Lessons Learned Session
- Document Lessons Learned

# Project Management 120 Hour Intensive Overview

## Overview

**Course Description:** This intensive 120-hour course will focus on ways employees can run projects faster and more effectively. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path, as well as how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts.

*The 120-hour intensive is broken down into the following four courses. Each course is designed to be taught in four and half days. Below, each of the four courses is broken down, showing an overview, description of each course, and detailed objectives to demonstrate what will be taught.*

# Project Management I - 4 1/2 Day

## *Initiating and Planning*

***PDU's - 30***

### **PMI's Talent Triangle Breakdown**

Technical - 13.50  
Leadership - 12.00  
Strategic - 4.50

### **PMI's Certification Breakdown**

PMP/PgMP - 30.00  
PMI-ACP - 16.50  
PMI-SP - 17.25  
PMI-RMP - 16.50  
PfMP - 16.50  
PMI-PBA - 16.50

***Course Description:*** Participants will begin their journey into project management concepts, theories, and foundational processes. This is the first of four courses specifically designed to align with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content as well as best practices which will be taught from the best practices.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

### ***Course Objectives:***

#### ***Initiating and Planning Module***

##### **Objective 1: Define the six step project management process**

- Examine the project's life cycle
- Recognize five ways to give proper leadership within culture
- Design an agenda for the first project team meeting
- Identify the triple constraints of every project
- Define the project drivers
- Demonstrate interviewing techniques that will assist in determining project specifics
- Review constraint red flags to watch
- Show how to set, control, and monitor project scope
- Summarize major areas to brainstorm

##### **Objective 2: Classify who to place on your project team**

- Label role descriptions and project responsibilities when you have no position power

#### ***Communication Module***

##### **Objective 3: Analyze the value of project interviews**

- Evaluate how to approach people
- Identify perception
- Examine what impacts project perception
- Compare reducing perception differences
- Discuss how to gain understanding
- Demonstrate what to do when you mess up

*(Continued on next page)*



## **Objective 4: Analyze communication styles**

- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult

## **Objective 5: Identify questions to ask if miscommunication is common**

- Evaluate verbal softeners
- Detail characteristics of a poor listener
- Predict obstacles of listening during projects

## **Objective 6: Define project management's role in project meetings**

- Describe ingredients of effective project meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback
- Compare techniques for disagreeing
- Discuss caution signs that a disagreement is turning into a conflict
- Formulate seven stages of intergroup conflict in project teams
- Describe ways to reduce intergroup conflict in project meetings

## **Project Facilitation Module**

### **Objective 7: Discuss the definition of project facilitation**

- Evaluate benefits of facilitation and how it will help your organization
- Discuss facilitation mess-ups during projects
- Examine the creation and usage of a code of conduct for the session
- Assess core duties which facilitators must do before, during and after a facilitation session
- Discuss best practices for setting meeting objectives and goals

### **Objective 8: Analyze body language and tone of voice which individuals use to communicate**

- Examine ways to clarify body language of others
- Discuss five useful ways for brainstorming during projects
- Analyze the proper usage of questions to engage the audience
- Formulate paraphrasing techniques for clarifying the meaning and message of others
- Compare different ways to use probing, bridging and redirecting skills
- Discuss the positives of having a devils advocate in project teams
- Examine professional ways to handle the negative participant

*(Continued on next page)*

- Analyze assertiveness techniques to be used by facilitators
- Formulate a standard preparation plan for starting a facilitation
- Examine best ways to be prepared for facilitation sessions
- Discuss best practices for ending a facilitation session

### **Objective 9: Describe the role and functions of a recorder in project teams**

- Discuss best practices for the recorder and creating minutes for determined actions
- Design rules for when using a buddy system during a facilitation session

### **Objective 10: Analyze tactics for handling resistance in project meetings**

- Evaluate the impact of conflict to the participants

### ***Project Team Time Management Module***

### **Objective 11: Discuss myths and realities of time management**

- Examine excuses for not managing your individual time
- Define roles and responsibilities which demand time
- Examine how to balance your time to create total human wellness in your life

### **Objective 12: Review qualities of time management**

- Define guidelines of time management

### **Objective 13: Evaluate causes of procrastination**

- Compare ways to stop procrastination
- Describe ways of dealing with deadlines
- Organize to set proper deadlines
- Create goals to help budget your time
- Evaluate the four D's in managing time more effectively
- List ways to say "No"
- Explain how to set and establish priorities
- Identify ways to plan your work and learn how to plan
- Create ways to handle the paper work
- Discuss time tips on interruptions and decisiveness
- Discuss time tips on the telephone and in meetings
- Formulate time tips on personal habits
- Evaluate how to organize yourself

## ***Project Management I Best Practices***

### **PROJECT MANAGEMENT OVERVIEW**

#### **INTRODUCTION**

- Project Management Methodology Concept
- What is a Project?
- Roles and Responsibilities
- Planning Process

*(Continued on next page)*

## **PROJECT INITIATING AND CONCEPT DEVELOPMENT**

- What is Project Management Methodology?
- Project Management is an Iterative Process
- The Relationship of Project Management to the System Development Life Cycle (SDLC)
- Applicability of the Methodology
- Tailoring of the Methodology to Specific Project and Specific Organizations
- Continual Improvements

## **WHAT IS A PROJECT?**

- What is a Project?
- Temporary Process
- Well-Defined Goals
- Project Constraints
- What is Project Management?

## **ROLES AND RESPONSIBILITIES**

- Roles and Responsibilities
- Who is Part of the Project Team?
- Importance of Stakeholders
- Project Manager
- Project Sponsor
- Steering Committee
- Development Team
- Configuration Management
- Quality Assurance
- End User
- Project Review Team Management
- Division of Purchases

## **PLANNING PROCESS**

- The Evolving Plan
- The Planning Process
- Planning in the Initiating Phase
- Planning in the Planning Stage
- Planning in the Project Start-up Stage
- Planning in the Project Execution Stage
- Planning in the Project Close-Out Stage

# Project Management II - 4 1/2 Day

## *Planning, Staffing, and Project Start Up*

***PDU's - 30***

***PMI's Talent Triangle Breakdown***

Technical - 14.00  
Leadership - 12.00  
Strategic - 4.00

***PMI's Certification Breakdown***

PMP/PgMP - 30.00  
PMI-ACP - 16.00  
PMI-SP - 17.50  
PMI-RMP - 16.00  
PfMP - 16.00  
PMI-PBA - 16.00

***Course Description:*** Participants will focus on how to conduct the initiating and planning phase of the project. This course will focus on scheduling, creating a work breakdown structure, and planning for human resource needs. In planning for human resource needs, participants will study behavioral skills that will help motivate, equip, and keep project team members accountable and on task. This section is aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content as well as best practices.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

***Course Objectives:***

***Planning, Staffing, Project Start Up Module***

**Objective 1: Manage brainstorming and planning meetings**

- Create a modified code of conduct for running an empowered team

**Objective 2: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a Work Breakdown Structure
- Discover how to track multiple projects
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Examine characteristics of a milestone

- Analyze strengths and weaknesses of a Gantt chart
- Define the critical path
- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Discuss effects of a late start

**Objective 3: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of project plan

*(Continued on next page)*

## *Managing Team Module*

### **Objective 4: Analyze job responsibilities**

- Discuss a priority checklist
- Assess modern day accountability myths

### **Objective 5: Evaluate how to coach the project team toward success**

- Develop workers with new skills
- Discuss values of successful coaching of project teams
- Analyze common coaching mistakes of project teams
- Develop a Mission Statement and Vision
- Identify vision through leadership
- Examine why visions fail
- Evaluate where you are going
- Explain tough-minded leadership
- Examine strategies for creating trust
- Define ways to equip and empower

### **Objective 6: Contrast different change strategies**

- Classify why project teams block change
- Choose ways to reduce project team resistance
- Evaluate changes which support goals
- Develop core values

### **Objective 7: Describe requirements for being an overcomer on project teams**

- Analyze two types of motivation within a project team
- Examine ways to align motivational techniques to workers
- Analyze the disciplining of project team members and ways for changing behavior
- Identify how to track project team members

## *Change Module*

### **Objective 8: Discuss the definition of change**

- Identify proactive and reactive characteristics
- Analyze why people resist change
- Evaluate four types of change
- Examine five roles of change agents
- Explain the drivers of change
- Classify the roadblocks to change
- Predict three areas that impact change on people
- Assess five new focuses from change
- Examine six ways fear hinders change
- Evaluate seven qualities of a paralyzed state
- Identify eight factors that determine a person's viewpoint
- Compare four ways people respond to change
- Evaluate when to create change quickly or gradually
- Formulate a checklist to help determine resistance
- Identify how to deal with setbacks

*(Continued on next page)*

## **Objective 9: Create a strategy for change**

- Perform a force field analysis
- Create an action plan

## ***Conflict Module***

## **Objective 10: Discuss the positive side of conflict**

- Define conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers

## **Objective 11: Examine rules for handling anger**

- Choose words to use that help
- Create action plans for quick resolution
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict

## **Objective 12: Review active listening skills**

- Discuss hedge words people use to distort communication
- Analyze techniques people use to avoid issues
- Review seven stages of group conflict

## **Objective 13: Create a code of conduct for controlling a resolution meeting**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard

- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

## ***Project Management II Best Practices***

### **PROJECT INITIATING AND DEFINITION INTRODUCTION**

- The Initiating Phase
- Elements of the Initiating Phase
- Project Management Phases
- Business Case/Project Statement
- Enterprise Projects or Programs
- Business Analysis
- Concept Review
- The Concept Atmosphere
- Problems during the Initiating Phase

### **BUSINESS CASE**

- Elements of the Business Case/Project Statement
- Who Does What
- How Should the Business Case/Project Statement be Developed
- A Plan for Planning
- Time frame for Completion
- Business Case Form
- Alternate Approaches to the Preparation of a Business Case
- Level of Detail
- Recommended Formats for Three Levels of Business Case
  - A. Business Case for a Mini Project
  - B. Business Case for a Medium Sized Project
  - C. Business Case for a Very Large Project

# Project Management III - 4 1/2 Day

## *Budgeting, Quality, and Risk*

***PDU's - 30***

### **PMI's Talent Triangle Breakdown**

Technical - 19.00  
Leadership - 6.00  
Strategic - 5.00

### **PMI's Certification Breakdown**

PMP/PgMP - 30.00  
PMI-ACP - 11.00  
PMI-SP - 11.00  
PMI-RMP - 18.75  
PfMP - 11.00  
PMI-PBA - 11.00

***Course Description:*** Participants will focus on additional planning of the project while examining issues such as risk, budgeting, and how to maintain quality throughout the project. Specifically, this course will focus on conducting risk analysis, problem solving, handling conflict, and maintaining quality throughout the entire project. In Phase III, when planning the budget, quality and risk are aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content as well as best practices.

***Method of teaching:*** Students will use discussion, cases, and group activities to facilitate the course.

### ***Course Objectives:***

#### ***Budgeting, Quality, and Risk***

**Objective 1: Identify seven things which must be communicated in every project**

- Review who should be communicated to
- Evaluate the results of poor communication
- Identify a checklist for team meetings
- Analyze signs of poor updates
- Describe ways to communicate bad news

#### ***Quality Module***

**Objective 2: Compare old and new philosophies in project management**

- Define quality for today's projects
- Identify a prevention mentality rather than a reactive one
- Evaluate data that must be analyzed

**Objective 3: Set guidelines for executing continuous quality through the project**

- Examine continuous process improvement for project processes
- Develop rules for continuous improvement
- Analyze where continuous improvement can help
- Discuss symptoms of quality concerns in past and future projects
- Design a continuous improvement project team's concern
- Judge ways to reduce resistance from organizational culture
- Compare roadblocks to continuous improvement and quality initiative

*(Continued on next page)*

## **Objective 4: Predict characteristics to the cost of quality in projects**

- Choose techniques for involving co-workers
- Evaluate Deming's seven deadly diseases
- Identify Juran's six-step approach to quality
- List steps for creating a quality action plan in projects
- Discuss implementation of the quality action plan
- Examine ways of monitoring the quality action plan
- Identify the strengths and weaknesses of Gantt charts
- Discuss the strengths and weaknesses of CPM charts

### ***Problem Solving Module***

## **Objective 5: Classify who should be on the problem solving team**

- Evaluate why participation helps solve the problem faster
- Discuss benefits of problem solving analysis in projects
- Review what influences the problem solving experience in projects
- Define the problem solving processes for successful projects
- Assess the resources needed to fulfill the problem solving plan

## **Objective 6: Examine creative solutions in solving project plans**

- Compare what to do if you inherit a goofy solution
- Perform a SWOT Analysis
- Evaluate the four steps to Force Field Analysis
- Discuss the benefits of Force Field Analysis

## **Objective 7: Define contingency planning and examine the crisis correctly**

- Evaluate how to implement the solution
- Discuss seven keys to problem solving implementation
- Identify the seven reasons for implementation failure

### ***Negotiation Module***

## **Objective 8: Analyze the benefits of negotiations**

- Examine killer mistakes in negotiations
- Evaluate three ways of bargaining
- Discuss the three views of preparation
- Identify techniques for personal preparation
- Assess preparation techniques to counter your opponent

## **Objective 9: Design and arrange the first session**

- Review how and why to set parameters in project negotiations
- Classify techniques for handling emotionally charged issues

*(Continued on next page)*



- Identify standard negotiation funneling practices
- Design questions that benefit your position while working on projects
- Discuss words to use in the questions for greater impact

## **Objective 10: Analyze barriers to overcome during negotiations**

- Identify guidelines for examining the opponent's position
- Evaluate research techniques for checking out the opponent

## **Objective 11: Examine ways to overcome price objections in project resources**

- Discuss the benefits of reinforcing price before negotiations
- Analyze standard negotiation strategies
- Identify techniques to use to follow up after the deal is made

## ***Project Management III Best Practices***

### **PROJECT MANAGEMENT PLANNING**

- Planning is the Seed for Success
- Responsibilities
- Terminology

### **PLANNING PROCESS AND PROJECT**

#### **PLAN**

- What is Project Planning
- The Planning Process
- Importance of the Project Plan
- Steps in the Planning Process
- Overview of Project Scheduling

### **ACTIVITY DEFINITION AND SEQUENCING**

- Develop Project Tasks
- Define Task Relationships
- Defining Deliverables
- Development of a Project Schedule
- Define Precise and Measurable Milestones
- Steps to Creating a Project Schedule
- Estimate Task Duration
- Define Priorities
- Define Critical Path
- Document Task Relationship
- Document Assumptions
- Review the Results

### **BUDGETING**

- Overview of Project Budgeting
- Identify Cost Factors
- Project Estimate Summary Worksheet
- Instructions for the Project Estimate Summary Worksheet
- Document Assumptions
- Review the Cost Estimates
- Estimated Cost at Completion Report

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## **CONFIGURATION MANAGEMENT**

- Configuration Management
- Configuration Management Organization
- Configuration Management Plan
- Tasks During the Planning Phase
- Relationship to Quality Management
- Authority and Responsibility
- Control Items
- Configuration Management Procedures
- Storage of Control Items
- Configuration Management Goes Beyond Development

## **QUALITY PLANNING**

- Quality Process
- Creating the Quality Plan
- Responsibility for Quality
- Independence of the Quality Assurance Team
- Checklist
- References

## **REQUIREMENTS DEFINITION**

- Importance of Project Requirements
- When are Requirements Defined?
- Requirements Specifications
- Who Defines Requirements?
- Requirements Traceability
- Approvals
- Managing Requirements Changes
- References

## **RESOURCE PLANNING**

- Overview of Resource Planning
- Determining the Size of the Team
- Determining Required Skills
- Identifying Required Non-Labor Assets
- Define Resource Profiles
- Forming the Team
- Support Functions
- Define Assumptions

## **RISK MANAGEMENT PLAN**

- Identify Risks
- Risk Management Process
- Responsibility for Risk Identification
- Risk Management Worksheet Instructions
- Contingency Planning
- Risk Management Worksheet Sample
- Suggested Preventive and Contingency Measures
- Risk Identification Summary (Top Five Risk)

## **PROJECT PLAN FORMAT**

- The Project Plan Template
- Plan Approval
- Project Summary
- Project Charter
- Project Trade Off Matrix and Status Summary
- Project Organization
- Activity List / Work Breakdown Structure
- Work Product Identification
- Project Schedule
- Estimated Cost at Completion
- Resource Loading Profiles
- Requirements
- Risk Management Plan
- Configuration Management Plan
- Quality Plan
- Top Five Issues
- Issue Item Status
- Action Item Status

# Project Management IV - 4 1/2 Day

## *Project Execution, Monitoring, and Close Down*

***PDU's - 30***

**PMI's Talent Triangle Breakdown**

Technical - 13.50  
Leadership - 12.50  
Strategic - 4.00

**PMI's Certification Breakdown**

PMP/PgMP - 30.00  
PMI-ACP - 16.50  
PMI-SP - 16.50  
PMI-RMP - 18.50  
PfMP - 16.50  
PMI-PBA - 16.50

**Course Description:** Participants will focus on monitoring and executing the project while moving into the close down phase of the project. Additional focus will be on problem solving and delivering quality customer service and value, regardless of if the customer is internal or external. Participants will discuss and participate in analysis of measuring the individual performance of team members. This section also focuses on how to properly hand the project off to the customer for an effective transition. Phase IV is aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content as well as best practices.

**Method of teaching:** *Students will use discussion, cases, and group activities to facilitate the course.*

**Course Objectives:**

**Objective 1: Describe ways to communicate bad news**

- Classify how to manage the project through influence rather than power

**Objective 2: Summarize danger signals to watch**

- Assess how to crash a project
- Apply close down checklists and handoff procedures
- Identify phase out of the project
- Perform a postmortem
- Review current hindrances facing organizations

**Customer Service Module**

**Objective 3: Analyze why every project should be concerned about customer service**

- Compare customer expectations to customer deliverables
- Define customer service for both internal and external customers in projects
- Evaluate customer expectations for projects
- Examine top customer complaints

*(Continued on next page)*

## **Objective 4: Identify how to build credibility with customers**

- Assess how to bond with customers
- Identify ways of persuading customers to provide more information
- Choose distinct connections every customer must receive

## **Objective 5: Rate human factors which mislead communication**

- Analyze unspoken signals which distort communication
- Recognize how to put active listening to work
- Evaluate ways for handling problem customers
- Review methods for calming down irate customers
- Identify special care to the elderly or chronically ill
- Discuss feedback systems that work in projects
- Label warning signals that customer service is dying
- Identify five ways to improve your customer service in every project

### ***Performance Module***

## **Objective 6: Discuss advantages of performance management**

- Identify performance needs
- Identify performance to project directives
- Analyze ways to communicate performance expectations in every project

## **Objective 7: Define ways of discovering the performance gap**

- Classify benchmarking techniques of present performance
- Discuss training and the performance gap
- Examine questions to ask in determining project performance
- Discuss how to break down project performance into understandable steps
- Define how to map the performance map

## **Objective 8: Review monitoring of project performance indicators**

- Show how to link operational goals to project performance
- Analyze mentoring roles in advancing project performance
- Examine the impact of incorporating best practices in project performance
- Evaluate how to create a project performance results matrix
- Develop a project performance development plan to transition team members toward peak performance

### ***Procurement Module***

## **Objective 9: Examine contracting process**

- Discuss methods of contracting

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**Objective 10: Compare contracting types**

- Describe evaluating and awarding contracts
- Discuss how to conduct a search for contract source

**Objective 11: List price and budgeting requirements**

- Examine interpreting changes
- Analyze termination of contracts
- Discover how to handling appeals, disagreements in contract
- Examine contract closeout planning

***Project Management IV Best Practices***

**INTRODUCTION TO EXECUTION**

- What Happens During Project Execution?
- Project Control Process
- Preventing Problems is Better than Fixing Them

**APPROVAL PROCESS**

- What is the Approval Process?
- Contractor Payments

**CONFIGURATION MANAGEMENT**

**CHANGE, VERSION AND ISSUE**

**MANAGEMENT**

- What Happens During Project Execution?
- You Can't Manage What You Don't Control
- The Change Control Form
  - Phase 1 - Requester Information
  - Phase 2 - Initial Review of the Change Request
  - Phase 3: Initial Impact Analysis
  - Phase 4: Final Review Results and Change Priority
- What is Issue Management
- The Issue Resolution Form
  - Phase 1 - Requester Information
  - Phase 2 - Initial Review of the Issues
  - Phase 3: Tracking
  - Phase 4: Final Review Results and Change Priority

**CORRECTIVE ACTIONS**

- The Best of Plans Can Go Wrong
- Where Problems Come From
- Fix the Problem with a Recovery Plan

**PROJECT REVIEWING**

- Review Process
- Informal Review Process
- The Status Review
- Team Meetings
- Executive Meeting
- Link to Change, Issue, and Quality Management

*(Continued on next page)*

## **RISK MONITORING AND MITIGATION**

- Preventing Problems
- What is After Risk Assessment?
- The Evolution of Risk Control
- Risk Monitoring is an Iterative Process
- Risk Manager
- Risk Meetings
- Ongoing Risk Identification
- Focus on Key Risk
- Risk Resolution
- Historical Record

## **TRACKING AND MONITORING**

### **PROJECT PERFORMANCE**

- Introduction to Project Tracking and Monitoring
- The Project Plan as the Road Map
- The Project Plan as the Baseline
- Why Tracking and Monitoring?
- How and What is to be Tracked
- When Should Tracking be Done?
- Activity and Schedule Tracking
- Monitoring
- Planned Versus Actual Costs
- Cost Determination
- Update the Cost Model
- Document Assumptions
- Tracking and Monitoring Costs
- Estimate at Completion (EAC) Summary Report
- Financial Metrics
- Resource Loading Updates
- Steering Committee
- Independent Reviews
- Periodic Updates
- Managing External Project Managers

## **PROJECT CLOSE-OUT**

### **INTRODUCTION**

- Overview

## **POST IMPLEMENTATION**

### **EVALUATION REPORT AND ARCHIVING**

- What is a Post Implementation Evaluation Report?
- Identifying and Addressing Success
- Who Prepares the Report?
- Collecting Project Data
- Where is the Archive Maintained
- How is the Archived Material Used?

## **RECOGNITION AND CELEBRATION OF SUCCESS**

- Recognition of Success
- What is Success?
- Conduct a Lessons Learned Session
- Document Lessons Learned

# Online Course Descriptions

## PMP® Exam Prep Boot Camp

**PDU's - 35**

### PMI's Talent Triangle Breakdown

Technical - 30.25  
Leadership - 3.75  
Strategic - 1.00

### PMI's Certification Breakdown

PMP/PgMP - 35.00  
PMI-ACP - 4.75  
PMI-SP - 4.75  
PMI-RMP - 6.75  
PfMP - 5.00  
PMI-PBA - 4.75

**Course Description:** This Boot Camp prepares each participant with all the core competencies to pass the PMP® the first time. We teach you the terms, processes and skills to pass the course with minimal post course study. Also, learn methodologies for taking national tests. This course will follow Project Management Institute's knowledge areas of *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 90 days.

**The Mathis Group PMP® Exam Guarantee:** In the unlikely event you do not pass the PMP® exam the first time, you will be able to review the course for 30 days and retake the exam. If you do not pass the PMP® the second time, you will have an additional 30 days to review the course and take the exam. If you do not pass the exam after the third attempt, The Mathis Group will refund the \$499 cost of the course.

### **Conditions:**

1. The student must complete all course activities, tests, and activities provided.
2. If additional attempts are necessary, the student is responsible for contacting The Mathis Group to be reactivated in the course.
3. All three attempts must be within 120 days of the initial PMP® Exam Prep Boot Camp purchase date.
4. If the three attempts go beyond the original 120 days, there will be a \$100.00 reactivation fee to reopen the course.

**PMP® Exam Prep Course Content:** The course content focuses on *PMBOK® Guide - 6<sup>th</sup> Edition*.

### **Examine the process groups:**

Initiating      Planning  
Executing      Monitoring and Controlling  
Closing

### **Examine the knowledge areas:**

- Project Integration Management
- Project Scope Management
- Project Schedule Management
- Project Cost Management
- Project Quality Management
- Project Resource Management
- Project Communications Management
- Project Risk Management
- Project Procurement Management
- Project Stakeholder Management

- Professional and Social Responsibility
- Test-taking strategies and techniques
- Project Management definitions, process charts, and formulas
- Practice exams, scenarios, and activities

### **What You Receive Online**

- The Mathis Group's course workbook
- Videos of content presentations
- Relevant activities
- Process charts
- Vocabulary tests
- 60+ Free online simulation tests

### **Recommended Material**

- *PMBOK® Guide - 6<sup>th</sup> Edition*
- *PMP® Study Guide 9<sup>th</sup> Edition* by Kim Heldman

# PMI-ACP® Exam Prep Boot Camp

## *PDU's - 21*

### *PMI's Talent Triangle Breakdown*

Technical - 15.75

Leadership - 5.25

### *PMI's Certification Breakdown*

PMP/PgMP - 21.00

PMI-ACP - 21.00

PMI-SP - 6.00

PMI-RMP - 6.25

PfMP - 5.50

PMI-PBA - 5.25

**Course Description:** This boot camp prepares each participant with all the core competencies to pass the PMI-ACP® the first time. We teach you the terms, processes and skills to pass the course with minimal post course study. In addition, this course is based upon the PMI®-recommended reference materials on Agile, Scrum, XP, Lean, and other Agile approaches.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 90 days.

**The Mathis Group PMP® Exam Guarantee:** In the unlikely event you do not pass the PMI-ACP® exam the first time, you will be able to review the course for 30 days and retake the exam. If you do not pass the PMI-ACP® the second time, you will have an additional 30 days to review the course and take the exam. If you do not pass the exam after the third attempt, The Mathis Group will refund the \$399 cost of the course.

### **Conditions:**

1. The student must complete all course activities, tests, and activities provided.
2. If additional attempts are necessary, the student is responsible for contacting The Mathis Group to be reactivated in the course.
3. All three attempts must be within 120 days of the initial PMI-ACP® Exam Prep Boot Camp purchase date.
4. If the three attempts go beyond the original 120 days, there will be a \$100.00 reactivation fee to reopen the course.

**PMI-ACP® Exam Prep Course Content:** The course content focuses on *PMI-ACP® Exam Prep 2<sup>nd</sup> Edition* by Mike Griffiths

### **Examine Agile Tools, Skills and Domains:**

- The Tools and Techniques and Knowledge and Skills areas to pass the exam
- The Tasks of Agile Principles and Mindset
- The Tasks of Value-driven Delivery
- The Tasks of Stakeholder Engagement
- The Tasks of Team Performance
- The Tasks of Adaptive Planning
- The Tasks of Problem Detection and Resolution
- The Tasks of Continuous Improvement

### **What You Receive Online**

- The Mathis Group's course workbook
- Videos of content presentations
- Relevant activities
- Memory Charts
- Vocabulary tests
- Hundreds of practice test questions

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## **Examine Agile Methodologies and Processes:**

- The foundation of Agile, the Agile Manifesto and Principles
- Scrum roles, meetings, tools, techniques and artifacts
- XP (eXtreme Programming) roles and practices
- Comparing Scrum and XP roles and practices
- Lean development practices in Agile Project Management
- Agile estimation techniques
- Agile team dynamics, soft skills, negotiation, and coaching
- How Epics and User Stories are created
- Communications techniques: daily stand-ups, information radiators, team spaces and osmotic communications
- Agile metrics, including velocity, escaped defects
- Comparing adaptive planning and traditional project management
- Value-driven delivery
- Product backlog grooming
- Problem detection and resolution
- Retrospectives
- Value Stream analysis

# Agile Project Management

## *Succeeding in a Project Filled With Uncertainty and Change*

**PDU's - 13**

### PMI's Talent Triangle Breakdown

Technical - 12.50

Leadership - 0.50

### PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 13.00

PMI-SP - 2.00

PMI-RMP - 1.75

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** Agile Project Management officially began in 2001 and has become a popular project management approach. This course will examine the focus of energizing, empowering, and enabling project teams to provide customer value in a strong Agile framework. Participants will examine the value and process to actively involve the customer in delivering features and functionality throughout the duration of the project. This course will explore actions which reinforce the ability to respond to a changing project environment while focusing on delivering high customer value in every project.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

### **Course Objectives:**

#### **Objective 1: Define Agile Project Management and the Agile manifesto**

- Compare why traditional projects struggle and fail
- Discuss criteria on when to use the Agile methodology
- Discuss when and how to use the hybrid approach to utilize traditional Project Management and Agile Project Management
- Identify the success factors of Agile Project Management
- Identify the principles of Agile Project Management

- Compare predictive planning and adaptive planning
- Discuss the rights and roles of the Agile business case

#### **Objective 2: Define user stories, story mapping, Kanban boards, and burn down charts**

- Examine the usage of product vision box and product backlog
- Discuss the characteristics of a time box

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## **Objective 3: Review how to use daily stand up meetings successfully**

- Examine the role and core skills of the project manager in Agile Project Management
- Examine the role of the culture to support the project team in Agile Project Management
- Examine the engaging role of the customer in Agile Project Management
- Discuss customer value in Agile Project Management

## **Objective 4: Examine strategies of Agile Project Management**

- Examine Agile modeling
- Discuss the characteristics of the cone of uncertainty
- Describe value stream in Agile Project Management

## **Objective 5: Discuss the positives of co-location, information radiators and team space**

- Analyze the planning processes of initiating, iteration, control, and closeout
- Analyze estimating in Agile Project Management such as size, iteration, and releases
- Analyze scheduling in Agile Project Management
- Analyze tracking and communication in Agile Project Management
- Analyze risk and changes in Agile Project Management
- Examine types of contracts that work best with the Agile framework

# Business Analysis Fundamentals

*PDU*s - 14

## PMI's Talent Triangle Breakdown

Technical - 14.00

## PMI's Certification Breakdown

PMP/PgMP - 14.00

PMI-PBA - 14.00

**Course Description:** *Business Analysis Fundamentals* is a course which will provide foundational skills in business analysis. Students will learn the basic roles of stakeholders and how to gather real requirements from each stakeholder; allow requirements gathering to influence the business case; and use communication techniques to strengthen stakeholder relationships throughout the entire project process. The course content was developed using *A Guide to Business Analysis Body of Knowledge (BABOK®)*, 3rd edition (IIBA), *Business Analysis for Practitioners (PMI)*, and other top Business Analysis resources.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

### **Course Objectives:**

#### **Objective 1: Review an overview of business analysis**

- Discuss the history of business analysis
- Show the Business Analysis Overview Process
- List *BABOK®*'s knowledge areas
- Define key terms used in business analysis
- Examine the Business Analysis approach
- Define the business analyst role
- Define business analyst competencies
- Examine the Business Analysis tiers

#### **Objective 2: Create a Business Analysis Plan**

- Examine the Business Analysis Planning Process

#### **Objective 3: Identify stakeholders and their roles**

- List requirements interview questions
- Define active listening

#### **Objective 4: Analyze the Requirements**

- Examine requirements elicitation
- Explain the Feasibility Study
- Examine product and project scope

#### **Objective 5: Uncover and Analyze Needs**

- Compare Needs and Requirements
- Design a Root Cause Analysis
- Create the Business Case
- Manage and Enforce the Scope
- Define the Scope

#### **Objective 6: Define and Manage Requirements**

- Compare Functional and Supplemental requirements
- Examine types of requirements

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- Define and detail requirements management
- Review guidelines for writing requirements

## **Objective 7: Examine Project Life Cycle Models**

- Define and model approaches including waterfall, vee, agile, rad, legacy, prototype, evolutionary, and spiral

## **Objective 8: Create Tools to Use**

- Examine the Zachman Framework for Understanding Organizations
- Summarize Business Drivers

## **Objective 9: Choose the Right Analysis Techniques**

- Analyze models for requirement analysis
- Discuss estimation techniques

## **Objective 10: Validate and Verify Solutions**

- Define and detail solution assessment and validation
- Discuss validation techniques
- Discover techniques for managing requirements traceability

## **Objective 11: Moving from Planning to Implementation**

- Prepare requirements package
- Examine transitioning

## **Objective 12: Examine Communication in Business Analysis**

- Discover the Business Analyst's role
- Examine Business Analysis in an Agile methodology

# Creating a Successful Project Business Case

*PDU*s – 13

## PMI's Talent Triangle Breakdown

Technical - 12.75

Strategic - 0.25

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 0.25

PfMP - 0.25

PMI-PBA - 0.25

**Course Description:** This online course will focus on the business case. Students will learn what a business case is, what it includes, why it is necessary for successful project management, and how to develop one for every project. Students will also learn how to conduct a business case review to ensure the project's success. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Define business case**

- Identify purpose of a business case
- Define and detail project charter
- Examine the relationship between organizational strategy and the business case
- Define content areas of a business case
- Examine strategies for converting data to monetary values
- Detail five steps to converting data to monetary values
- Define and detail return on investment (ROI)
- Define and detail benefit/cost ratio, payback period, net present value, internal rate of return

### **Objective 2: Discuss areas of document objectives, reasons, benefits and benefits realization**

- Discuss areas of timescale, costs and investment appraisal
- Define and detail sensitivity analysis
- Define estimating concepts and detail four models of estimating
- Define and detail project data collection
- Examine hard and soft data

### **Objective 3: Examine the building/creation of a business case**

- Examine methods of developing a business case
- Examine different formats for a business case
- Examine business case templates

*(Continued on next page)*

## **Objective 4: Define business case review**

- Examine questions to ask during a business case review
- Define inputs and outputs from a business case review
- Examine options after a business case review

## **Objective 5: Identify levels of responsibility with a business case**

- Analyze a business case example

# Dealing with Conflict and Negativity in a Project Management Environment

*PDU's - 14*

## PMI's Talent Triangle Breakdown

Leadership - 14.00

## PMI's Certification Breakdown

PMP/PgMP - 14.00

PMI-ACP - 14.00

PMI-SP - 14.00

PMI-RMP - 14.00

PfMP - 14.00

PMI-PBA - 14.00

**Course Description:** This course will focus on ways to reduce professional or personal conflict and negativity. Students will gain insight into ways to acquire control of volatile situations and prevent anger from escalating. They will learn how to turn negative situations around in the workplace. They will receive clear steps of action for getting to the root of the conflict. Students will examine why negative situations ripple into every area of the organization. They will discover ways to facilitate bad situations, techniques for gaining consensus, and simple confrontation techniques that reduce stress will all be examined. They will create approaches which will turn a negative situation into an optimistic workforce.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Define conflict**

- Discuss the positive side of conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers

### **Objective 2: Examine rules for handling anger**

- Choose words to use that help
- Create action plans for quick resolution
- Analyze hostility and how it surfaces
- Examine how to handle personal and professional hostility
- Compare levels of group conflict
- Examine seven stages of group conflict

### **Objective 3: Review active listening skills**

- Discuss hedge words people use to distort communication
- Analyze techniques people use to avoid issues

### **Objective 4: Create a code of conduct for controlling a resolution meeting**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques
- Review assertiveness techniques
- Apply facilitation skills for allowing everyone to be heard

*(Continued on next page)*



- Discuss the facilitator's responsibilities
- Create questions to guide others through the process
- Analyze ways to prevent arguing
- Discuss times to make amends

## **Objective 6: Evaluate the inner/personal dialog**

- Identify the family influence
- Assess ways for rebuilding trust
- Create an action plan

## **Objective 5: Examine definition of negativity**

- Analyze the cost of negativity in U.S. organizations
- Evaluate the challenges of the modern workplace
- Formulate a five step approach in examining negativity
- Review the CIA way negativity grows
- Discuss situational, habitual, and chronic negativity
- Discuss the effect of someone else's negativity on you
- Create stair steps toward negativity
- Assess results of negativity
- Compare ways in dealing with the negaholics
- Develop rules for confronting negativity
- Analyze how to break the victim complex
- Define ways to impact negative culture
- Discuss how to fight personal negativity

# Project Communications Management

***PDU*s - 13**

## **PMI's Talent Triangle Breakdown**

Technical - 11.00

Leadership - 2.00

## **PMI's Certification Breakdown**

PMP/PgMP - 13.00

PMI-ACP - 2.00

PMI-SP - 2.00

PMI-RMP - 2.00

PfMP - 2.00

PMI-PBA - 2.00

**Course Description:** This course will focus on ways to use project communication and communication theories as a way to influence others within and outside of the project team. Participants will learn how to focus on framing the data and information in a correct manner as well as proper usage of words and language for influencing project stakeholders. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Analyze the value of project interviews**

- Evaluate how to approach people
- Identify perception
- Examine what impacts project perception
- Compare reducing perception differences

### **Objective 2: Discuss how to gain understanding**

- Demonstrate what to do when you mess up
- Analyze communication styles
- Develop ways to increase understanding
- Compare kinds of project communication
- Describe what communication should be communicated upline
- Examine reasons why communicating upline is extremely difficult
- Identify questions to ask if miscommunication is common
- Evaluate verbal softeners
- Detail characteristics of a poor listener
- Predict obstacles of listening during projects

### **Objective 3: Define project management's role in project meetings**

- Describe ingredients of effective project meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback

### **Objective 4: Examine techniques for disagreeing**

- Discuss caution signs that a disagreement is turning into a conflict

### **Objective 5: Define the processes in project communication management**

- Detail the process of Plan Communications Management
- Detail the process of Manage Communications
- Detail the process of Monitor Communications

# Project Cost Management

**PDU's – 6.5**

**PMI's Certification Breakdown**

PMP/PgMP - 6.50

**PMI's Talent Triangle Breakdown**

Technical - 6.50

**Course Description:** This course will focus on basic cost management theories and techniques. Students will learn how to give value to the customer beyond cost. There will also be a discussion of ways to get the project back on track and how to adjust budgeting issues during over expenditures. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Examine budgeting basics**

- Review estimating techniques
  - Past history
  - Effort
  - Hours
  - Resources
  - Contingency
  - Rework
  - Labor
  - Technology
  - Pilot program
  - Training
  - Roll out
  - Building/facility
  - Maintenance
  - Follow-up
- Discuss the pre-estimating process
- Evaluate constraint estimating
- Examine team design
- Discuss expert estimating
- Analyze cost projections
- Assess creative steps to estimating
- Detail the problem

### **Objective 2: Examine estimating the initial cost**

- List constraints which impact cost
- Compare cost control systems

- Discuss cost estimate basics
- Review types of estimates
- Discover how to figure the ROI on your project
- Discover how to allocate costs

### **Objective 3: Discuss how to handle emergencies**

- Evaluate unplanned work
- Examine scope creep
- Examine scope change
- Identify what to do when the estimate is too high
- Examine how to get the project back on budget

### **Objective 4: Define the processes of project cost management**

- Examine the process of Plan Cost Management
- Examine the process of Estimate Costs
- Examine the process of Determine Budget
- Examine the process of Control Costs

# Project Management Fundamentals

## *PDU*s - 6.5

### *PMI's Talent Triangle Breakdown*

Technical - 5.50

Leadership - 1.00

### *PMI's Certification Breakdown*

PMP/PgMP - 6.50

PMI-ACP - 1.00

PMI-SP - 1.00

PMI-RMP - 1.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This course will focus on ways employees can run projects faster and more effectively. This course will recommend a six-phase process, as well as numerous preventative actions to efficiently speed up a project. Participants will learn how to successfully create, monitor, and guide the project's scope and critical path, as well as how to manage multiple projects. Participants will diagnose and prevent problems such as scope creep, time slippage, and team conflicts. This course will follow the Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

### *Course Objectives:*

#### **Objective 1: Define the six step project management process**

- Examine the project's life cycle
- Identify the triple constraints of every project
- Define the project drivers

#### **Objective 2: Discuss five ways to give proper leadership within culture**

- Design an agenda for the first project team meeting
- Summarize major areas to brainstorm
- Manage brainstorming and planning meetings

#### **Objective 3: Demonstrate interviewing techniques that will assist in determining project specifics**

- Review constraint red flags to watch
- Show how to set, control and monitor project scope

#### **Objective 4: Classify who to place on your project team**

- Create a modified code of conduct for running an empowered team
- Label role descriptions and project responsibilities when you have no position power

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## **Objective 5: Examine forms in scheduling a project and possible scheduling issues**

- Formulate a Work Breakdown Structure
- Discover how to track multiple projects
- Evaluate a real time line
- Evaluate why time calculations are wrong
- Examine characteristics of a milestone
- Analyze strengths and weaknesses of a Gantt chart

## **Objective 6: Define the critical path**

- Evaluate the strengths and weaknesses of a critical path
- Discuss how to handle delays
- Assess how to crash a project

## **Objective 7: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of project plan

## **Objective 8: Identify seven things which must be communicated in every project**

- Apply close down checklists and handoff procedures

# Project Monitoring, Evaluation, and Oversight

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 12.00

Leadership - 0.75

Strategic - 0.25

## PMI's Certification Breakdown

PMP/PgMP - 13.00

PMI-ACP - 1.00

PMI-SP - 1.00

PMI-RMP - 1.00

PfMP - 1.00

PMI-PBA - 1.00

**Course Description:** This course will examine how to establish processes and evaluation techniques for auditing project solutions. Students will learn data collection techniques and how to convert soft data to monetary values which can be measured and evaluated. Students will discover various audits and how to measure project components such as performance, resources, planning, customer relationships, and vendor-contractor relationships. This course will also focus on establishing process improvements in the maintaining of oversight procedures. Students will be able to apply widely accepted standards and preferred evaluation and oversight principles, as well as provide means to compile, analyze, and optimize project performance. We will explore ways to deliver feedback and make recommendations to the appropriate individuals in the organization. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Define project oversight and why it is needed in organizations**

- Develop evaluation processes and procedures
- Compare the difference between research and evaluation
- Evaluate current hindrances facing organizations when conducting oversight
- Analyze various ways of setting standards and measurements for projects
- Examine project metrics and requirements
- Define internal stakeholders for oversight and evaluation
- Discuss benchmarking techniques
- Define the what, why and how of evaluation

- Develop methods to evaluate projects you did not create
- Discuss models of successful evaluation
- Classify key success factors

### **Objective 2: Examine data collection methods, formats and data analysis**

- Evaluate ways to measure skills and knowledge
- Analyze how to calculate and interpret ROI
- Identify application and implementation costs
- Discuss forecasting methods
- Design evaluation templates and tools to conduct audits

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## **Objective 3: Examine project planning audit**

- Examine project performance audit
- Examine project resource audit
- Compare technology audits
- Examine customer acceptance audit
- Discuss vendor-contractor audits
- Create evaluation reports that impact the organization in a positive way

## **Objective 4: Discuss methods for making recommendations which encourage rather than disrespect**

- Evaluate recording techniques for making recommendations
- Discuss recovery assessment processes
- Examine recovery indicators
- Examine a project recovery plan

# Project Planning and Program Control Processes - Part 1

*PDU*s - 25

## PMI's Talent Triangle Breakdown

Technical - 19.00

Leadership - 6.00

## PMI's Certification Breakdown

PMP/PgMP - 25.00

PMI-ACP - 6.00

PMI-SP - 9.00

PMI-RMP - 6.00

PfMP - 6.00

PMI-PBA - 6.00

**Course Description:** This course will present the fundamentals of the technologies to manage projects. New and innovative principles of project planning and program control will be taught using practical application scenarios. This course will begin at an introductory level and work up through the disciplines and processes used to build proper project models. The Mathis Group is excited to enter into a partnering relationship for this course with Dennis Busch, founder of Project Management Technologies, Inc.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Introduction**

- List workshop objectives
- Define managing processes
- Discover where the value of planning is
- Explain Return on Investment (ROI)
- Evaluate the project management legacy

### **Objective 2: The Skills of a Project Manager**

- Define the two essential skills of a project manager
- Analyze interpersonal skills
- Analyze mechanical skills

### **Objective 3: To Plan or Not to Plan**

- Review the important aspects of why planning is essential in the successful management of projects
- Identify the characteristics of problems
- Compare proactive versus reactive management
- Recognize the problem resolution methodology and its relationship to PM

### **Objective 4: What is a Project?**

- Explain characteristics of a project and how it differs from other forms of endeavors
- Identify the three dimensions of project objectives

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- Discover the “Key Drivers” of a project
- Define the “4 Project Management Steps”
- Compare top-down versus bottom-up planning philosophy
- Classify the right combination of factors
- Examine why the typical parameters used to measure a project are not the right parameters to manage it

## **Objective 5: Defining Project Purpose**

- Construct the project’s technical, cost, and schedule objectives in the beginning
- Identify the Project Management Mechanisms
- Develop the project charter
- Compare sources of objectives
- Assemble needs assessment
- Show how to measure/validate accomplishments
- Define constraints, exclusions, and assumptions
- Summarize deliverables to objectives
- Discover milestones

## **Objective 6: Defining Project Workscope**

- Define Workscope
- Identify and define detail work effort
- Discuss principles of ‘Work Decomposition’
- Analyze the Work Breakdown Structure
- Classify the organizational structures (OBS) and the importance of integrating the work and organizational structures

## **Objective 7: Detail Planning**

- Define Bottom-up planning
- Examine how to properly define project activities
- Assess how to properly define and the use of project events/milestones

## **Objective 8: Interaction Analysis**

- Compare methodologies of interaction analysis
- Discuss Timelining
- Discuss what is project modeling: how does it work, when should it be used, what are its limitations
- Identify model elements
- Develop activities, relationships, and events
- Summarize project models: series of paths, right-to-left and left-to-right planning, relativistic tool, appropriate level of detail to base model

## **Objective 9: Time Analysis or CPM**

- Define project calendars
- Review CPM
- Define the backward pass process
- Analyze total float
- Examine events and milestones

# Project Planning and Program Control Processes - Part 2

*PDU*s - 25

**PMI's Talent Triangle Breakdown**

Technical - 25.00

**PMI's Certification Breakdown**

PMP/PgMP - 25.00

PMI-RMP - 3.00

**Course Description:** This course will build on the fundamental principles taught in *Project Planning & Program Control Processes Part 1*. It will include new and innovative principles of project planning and program control taught using practical application problems. It will cover essential areas of resource planning, schedule reconciliation, and how to status and manage a project through program control methodology. The Mathis Group is excited to enter into a partnering relationship for this course with Dennis Busch, founder of Project Management Technologies, Inc.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

**Course Objectives:**

**Objective 1: Resource Planning**

- Define what resources are
- Examine the Total Resource Management Problem
- Identify the resource acquisition cycle and its impact
- Compare the Project Level Management Problem and the Resource Modeling process
- Recognize resource pools and their effective availability
- Define resource requirements for each activity
- Develop activity schedule, aggregate resource requirements, availability versus cumulative requirement analysis, and problem identification and quantification

- Discover problem resolution strategies
- Analyze the role of the computer in resource planning, along with its myths and misconceptions
- Describe the budget excuse and why it is invalid
- Summarize an integrated resource system

**Objective 2: Establish Project Baselines**

- Recall the three baselines: technical, schedule, and cost
- Identify the Schedule Reconciliation process
- Design effective schedule and budget options
- Examine the Principals of Path Dynamics
- Appraise consequences of any action

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- Discuss modeling tools
- Evaluate how to determine, establish, and manage the baselines

### **Objective 3: Performance Measurements and Management**

- Analyze Workscope Change Management
- Examine technical, cost, and schedule performance measurements
- Create actual and projected dates
- Compare activity status, event/milestone status, and model status
- Compose impact analysis through schedule rippling, resource impacts, & effects to total float
- Contrast potential versus real impacts
- Identify path dynamics and management strategies/actions
- Review the impediments of large databases
- Discover the practical level of project modeling
- Discuss the tiers of management and the distribution of management responsibilities
- Show the need for supportive working level detail planning and management, as well as executive support and involvement

### **Objective 4: Reports**

- Examine Management Information – the right product for each specific purpose
- Contrast graphic versus tabular reporting
- Evaluate software utilities (filtering and sorting)
- Discuss coding to exploit data capabilities
- Describe the purpose of various products
- Identify how to use Project Model Diagrams for problem analysis
- List how to report schedule and resource problems

### **Objective 5: Risk & Opportunity Management**

- Define Risk Management
- Compare qualitative and quantitative analysis
- Examine the basics of CPM, ‘What-if’ analysis, PERT process, and the value of 3-time estimates, and Monte Carlo Simulations
- Label risk resolution and opportunity instigation strategies

### **Objective 6: Summary/Conclusions**

- Identify project modeling fallacies
- Discuss the planning ‘Cop-outs’
- Examine the proper expectation of Project Management software
- Review planning and scheduling terminology, essential processes and practical methodology

# Project Quality Assurance, Monitoring and Auditing

*PDU*s - 13

*PMI's Certification Breakdown*  
PMP/PgMP - 13.00

*PMI's Talent Triangle Breakdown*  
Technical - 13.00

**Course Description:** In this course, participants will focus on issues such as how to maintain quality by using audits and evaluations for monitoring purposes. Quality theories taught by Drs. Deming and Juran will be included as foundations for implementing new quality initiatives. In addition, several types of project audits will be explored as a means of controlling the project with more efficiency. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Examine continuous process improvement for project processes**

- Discuss five key checkpoints for quality management
- Analyze the mainline quality and monitoring processes
- Analyze the specific actions to improve quality
- Discuss quantitative measurements
- Examine the six general types of cost

### **Objective 2: Analyze the tools for quality control**

- Evaluate Deming's 14 points to maintaining quality
- Identify Juran's 10 symptoms to quality problems
- Define the three major processes of project quality management
- Examine the process of quality assurance

- List the nine C's of quality
- Evaluate the four steps to Force Field Analysis
- Discuss seven keys to problem solving implementation

### **Objective 3: Examine benefits of project auditing**

- Analyze project performance audit
- Examine customer acceptance audit
- Discuss methods for making recommendations
- Compare recording techniques for making recommendations
- Develop project audit performance points

### **Objective 4: Discuss recovery assessment process and model**

- Examine recovery indicators
- Examine a project recovery plan
- Discuss recovery lessons learned

# Project Risk Management

***PDU's - 13***

**PMI's Talent Triangle Breakdown**

Technical - 12.75

Strategic - 0.25

**PMI's Certification Breakdown**

PMP/PgMP - 13.00

PMI-ACP - 0.25

PMI-SP - 0.25

PMI-RMP - 13.00

PfMP - 0.25

PMI-PBA - 0.25

***Course Description:*** This course will teach participants how to examine and measure objectives within cost, schedule, and cultural issues. Risk for this program is examined as defining the probability of the project. This course will examine risk identification, risk communication, and risk planning. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

***Method of teaching:*** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

***Course Objectives:***

**Objective 1: Define risk**

- Examine sources of risk
- Define risk management
- Analyze signals of risk
- Describe risk trade-off
- Examine data gathering
- Explain how to evaluate plans
- Review interviewing
- Develop how to facilitate a brainstorming session

**Objective 2: Evaluate how to confront attitudes on risk**

- List techniques for confronting risk
- Examine how to conduct risk analysis
- Examine ranking
- Discuss scenario
- Examine statistical process control
- Describe risk turmoil
- Discuss performance risk
- Discuss system risk
- Discuss process risk

**Objective 3: Examine how to managing risk plans**

- Discuss transferring risk
- Examine monitoring risk

**Objective 4: Develop risk teams**

- Create a special response team

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## **Objective 5: Define the processes of risk management**

- Examine the process of Plan Risk Management
- Examine the process of Identify Risks
- Examine the process of Perform Qualitative Risk Analysis
- Examine the process of Perform Quantitative Risk Analysis
- Examine the process of Plan Risk Responses
- Examine the process of Implement Risk Responses
- Examine the process of Monitor Risks

# Successful Negotiation in a Project Management Environment

*PDU*s - 13

## PMI's Talent Triangle Breakdown

Technical - 6.75  
Leadership - 6.00  
Strategic - 0.25

## PMI's Certification Breakdown

PMP/PgMP - 13.00  
PMI-ACP - 6.25  
PMI-SP - 6.25  
PMI-RMP - 6.25  
PfMP - 6.25  
PMI-PBA - 6.25

**Course Description:** This course will examine the strategies of successful negotiation throughout the project's life cycle. Participants will learn the value of successful negotiation, the negotiation process, and different negotiation models. This course will include examples in negotiation over scope, deadlines, change, and getting the best price from your vendor. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

**Method of teaching:** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

## **Course Objectives:**

### **Objective 1: Define negotiation**

- Identify the benefits of negotiations
- Define and detail negotiating skills for project managers
- Define and detail negotiations in projects including interpersonal negotiations and contract negotiations

### **Objective 2: Examine the negotiation process**

- List and examine negotiation strategies
- Examine preparation techniques for negotiation
- Discuss how to lead the negotiation process

### **Objective 3: Recognize how to deal with the other party's negative tactics**

- Examine how to align the support of others before, during and after the negotiation
- Identify communication skills needed for successful negotiation
- Analyze win-win negotiations
- Create strategies for controlling conflict in negotiation
- Apply negotiating to resolve conflict

### **Objective 4: Develop how to negotiate with your project team**

- Discover negotiation skills for purchasing
- Examine how to use BAFO to your advantage

# Vendor Management

## *Managing, Monitoring and Controlling*

### *Vendor Relationships*

#### ***PDU's - 19.5***

#### **PMI's Talent Triangle Breakdown**

Technical - 15.75  
Leadership - 1.25  
Strategic - 2.50

#### **PMI's Certification Breakdown**

PMP/PgMP - 19.50  
PMI-ACP - 3.75  
PMI-SP - 3.75  
PMI-RMP - 4.50  
PfMP - 3.75  
PMI-PBA - 3.75

***Course Description:*** This course will provide detailed instruction in areas such as pre-solicitation, solicitation, and award of a contract. Each participant will develop tools for working with vendors, a clear understanding of vendor motivation, and techniques for making it a win-win relationship. This course will focus on ways to select, monitor, and control vendors, as well as how to make vendors a partner or an extension as stakeholders who deliver the right performance throughout the length of the project. In addition, this course will focus on all aspects of vendor management, such as developing vendor management plans, identifying performance measurements and discussing various contract types and their strengths and weaknesses.

***Method of teaching:*** Students will learn tips, techniques and processes through webinars, which can be accessed 24/7 and completed at their own pace. Remember, though, that you must complete the course within 60 days.

#### ***Course Objectives:***

##### **Objective 1: Discuss vendor challenges**

- Examine the future of vendor relationships
- Compare purchaser and vendor motivations
- Compare the pros and cons of outsourcing a project to a vendor
- Discuss reasons for vendor relationships
- Examine the real world of culture and language
- Evaluate how vendor management can benefit organizations

##### **Objective 2: Examine phases in the acquisition process**

- Explain the duties of the contract officer
- Identify best practices of vendor management
- Discuss reasons and roles for a Vendor Management Office
- Compare the procurement cycle to project management
- Compare organizational and government procurement processes

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## Objective 3: Examine the 5 phase process of vendor management

### - Phase one: Pre-Award Stage

- Forecasting future requirements
- Acquisition planning
- Project scope statements
- Make or buy discussion
- Baseline estimated cost
- Successful steps for creating an effective RFP
- Examine what impacts the RFP process
- Basic parts of the RFP
- Designing a statement of work
- Key elements of a performance work statement
- Methods of contract surveillance

### - Phase two: Source selection

- Techniques on setting expectations
- Vendor risk
- Conducting a risk analysis of each vendor
- Risk sharing
- Criteria for evaluating the vendors
- Vendor evaluation process
- Sealed bidding process
- Success criteria for evaluating vendors
- Qualifications for vendor selection

### - Phase three: Award Contract

- Vendor orientation
- Vendor management plan
- Vendor measurements or scorecard
- Vendor performance
- Negotiation strategies used by vendors
- Strengths and weaknesses of contract types

### - Phase four: Contract management

- Work plan to fulfill statement of work
- Benchmarks
- Communication
- Status and performance meetings
- Types of audits
- Auditing plan
- Internal and vendor project manager relationships
- Auditing process
- Difference between internal, external and third party auditing
- Areas for the auditing examination
- Vendor conflicts and how to resolve them
- Best practice guide sheet for auditing
- Process designs for auditing the vendor
- Monitoring contractor requests for payment
- Contract modifications
- Contract termination for convenience
- Procedures for termination for convenience
- Contract termination for default
- Procedures for termination for default
- Contract disputes
- Ethical standards and procurement integrity

### - Phase five: Contract closure

- Knowledge transfer
- Vendor/customer handoff
- Contract closeout
- Steps in contract closeout

# *Seminars, Keynotes And Topics*

## **Management**

Management A-Z  
Successfully Managing People In A Technical Setting  
How To Handle Difficult People  
Coping With Change  
12 Steps To Better Decision Making  
How To Build Trust And Respect  
Mastering Project Management  
Project Management Intensive  
Empowering Employees For Success  
How To Discipline Employees  
Empower Or Perish  
Coaching And Counseling Employees  
Managing Multiple Projects And Tasks

## **Leadership**

Developing And Mentoring Your Workforce  
How To Delegate And Hold Them Accountable  
Values Based Leadership: Our Only Hope  
Executive Coaching  
Strategic Planning  
Motivating And Empowering Your Workforce  
The Lost Art Of Leadership  
Tough Minded Leadership  
Vision Driven Leadership  
Foundations Of 21st Century Planning  
Becoming A Confident Decision Maker  
Creating Strategic Change  
Successfully Handling Turbulent Change  
Handling Personal And Professional Change

## **Attitude/Negativity**

Creating An Optimistic Workplace  
Mountain Moving Motivation  
Battling Burnout  
Becoming An Overcomer  
The Impact Of Humor In The Workplace  
Turning Turkeys Into Eagles

## **Communication**

Proactive Communication  
Communicating For Results  
You Said, We Said, They Said  
Facilitation Fundamentals  
Communication: What You Heard Is Not What I Said  
Secrets Of Presenting Like A Pro  
Increase Communication And Get Your Point Across

## **Consulting**

Consulting Skills For A New Day  
How To Build Your Consulting Business  
Solving Problems As A Consultant  
Consulting Fundamentals

## **Human Resource**

Successfully Recruiting Tomorrow's Worker  
Market Yourself For Your Next Employer  
Performance Appraisals That Work

## **Conflict**

Dealing With Difficult And Obnoxious People  
How To Talk About The Tough Issues  
Handling Conflict And Confrontation

## **Customer Service**

Customer Relationship Management (CRM)  
Customership: Building Unbelievable Service  
21st Century Customer Service  
Customer Retention - Our Future Success

## **Sales/Marketing**

Controlling The Seven Mile Border  
Marketingology: The Art Of Attracting New Customers  
Secrets Of Closing More Sales  
Selling 101 Fundamentals  
Advanced Sales Skills For A New Millennium  
Creating Customer Driven Value  
Selling With Values And Integrity  
Marketing Your Company For Results  
Foundations Of Organizational Marketing  
Fundamentals Of Sales In The 21st Century  
Sales Management Intensive  
Negotiate Like A Pro  
Sales Force Management  
Consultive Selling Made Simple

## **Teams**

Organizing Highly Effective Teams  
Building Cross Functional Teams  
Building Team That Work  
Conquering Team Conflict  
Creating Self Directed Teams

## **Writing Skills**

Effective Business Writing Skills  
Grammar And Punctuation Skills