

# THE MATHIS GROUP, INC.

## PROJECT MANAGEMENT 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



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DUNS Number: 007722098  
EIN: 43-1948379  
GSA Contractor Number:  
GS02F-0010V

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



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



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

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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 Statements*

**Since 1993, The Mathis Group has been helping organizations change worker productivity and behavior.**

***The Mathis Group Mission:*** The Mathis Group provides quality, customized training and consulting services that inspire, educate, and equip organizations to be better tomorrow than they are today.

***Company Mandate:*** The Mathis Group provides training and consulting that will impact the organization and individual while maintaining an outstanding reputation for success and integrity.

***Values Statement:*** Every person has worth and should be treated with respect.

## ***Area of Expertise:***

- PMP® and PMI-ACP® Exam Prep
- Curriculum Design
- Project Management
- Agile Project Management
- Organizational Behavior and Development
- Management
- Balanced Scorecard
- Strategic Planning
- Executive Coaching
- Performance
- Team Building
- Leadership
- Customer Service
- Creating Customer Value
- Marketing
- Sales
- Supervisory Leadership
- Six Sigma
- Coaching and Counseling

## *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.

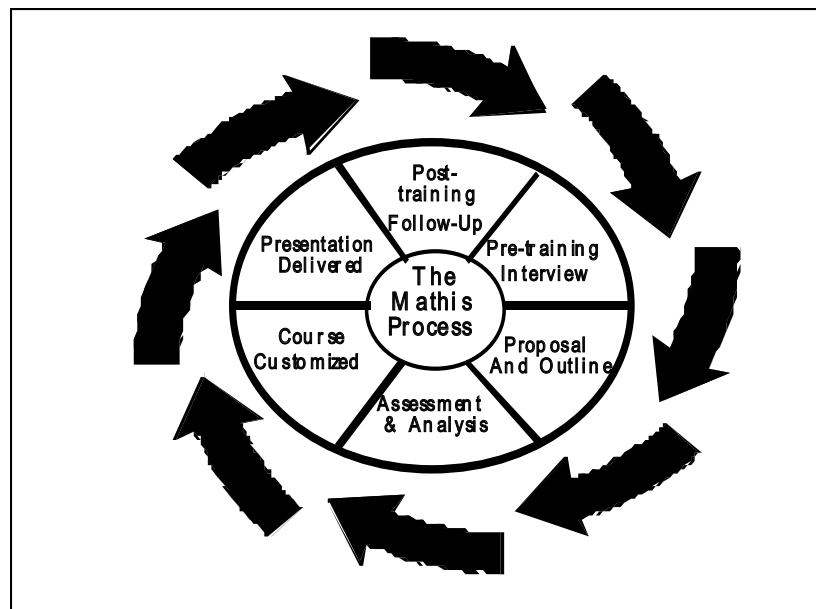


Figure 1

### **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.



# 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

### Characteristics

#### Mental

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.

## **The Mathis Group 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).

## **The Mathis Group is an IACET Provider Offering CEUs**

Since 2012, The Mathis Group is an authorized provider with IACET offering Continuing Education Units (CEUs). We strive to help all members of professional certifications to maintain their good standing. We have agreed to abide by IACET's established operational and educational criteria, and are subject to random audits for quality assurance purposes. We have over 90 courses to offer for CEUs.

## Partial Government Client Listing

- City Government of Atlantic City
- Consumer Product Safety Commission
- 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
- 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

# 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**

**CEUs - 3.5**

### PMI's Talent Triangle Breakdown

Technical - 30.25

Leadership - 3.75

Strategic - 1.00

### PMI's Certification Breakdown

PMP - 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) - 5<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 Time Management  
Project Cost Management  
Project Quality Management  
Project Human 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) - 5<sup>th</sup> Edition*
  - *PMP® Study Guide 8<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

*(Continued on next page)*

## 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

CEUs - 2.1

### PMI's Talent Triangle Breakdown

Technical - 15.75

Leadership - 5.25

### PMI's Certification Breakdown

PMP - 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  
*CEU*s – 2.0

## PMI's Talent Triangle Breakdown

Technical - 19.50

## PMI's Certification Breakdown

PMP - 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**  
***CEU*s - 0.40**

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

Technical - 3.00  
Leadership - 0.50

## **PMI's Certification Breakdown**

PMP - 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  
*CEU*s - 0.70

*PMI's Certification Breakdown*  
PMP - 6.50

*PMI's Talent Triangle Breakdown*  
Technical - 6.50

**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 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

*(Continued on next page)*

## **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

# Comprehensive Project Management - 2 Day

*PDU*s - 13  
*CEU*s - 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 12.00  
Leadership - 1.00

## *PMI's Certification Breakdown*

PMP - 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

*(Continued on next page)*

## **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**  
***CEU*s - 2.0**

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

Technical - 18.75  
Leadership - 0.75

## **PMI's Certification Breakdown**

PMP - 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  
*CEU*s - 1.5

## *PMI's Talent Triangle Breakdown*

Technical - 8.00  
Leadership - 7.00

## *PMI's Certification Breakdown*

PMP - 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

*(Continued on next page)*



- Choose 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
- 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
- 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 to confronting risk
- Examine ranking
- Discuss performance, system, and process risks
- Examine data gathering
- Explain how to evaluating 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

### 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

# Agile Project Management - 2 Day

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

***PDU's - 13***

***CEUs - 1.3***

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

Technical - 12.50

Leadership - 0.50

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

PMP - 13.00

PMI-ACP - 12.50

PMI-SP - 1.50

PMI-RMP - 1.25

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

*(Continued on next page)*

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

*PDU*s - 14  
*CEU*s - 1.4

## *PMI's Certification Breakdown*

PMP - 14.00  
PMI-PBA - 14.00

## *PMI's Talent Triangle Breakdown*

Technical - 14.00

**Course Description:** *Business Analysis: The BABOK<sup>®</sup> 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  
*CEU*s - 1.4

*PMI's Certification Breakdown*  
PMP - 14.00  
PMI-PBA - 14.00

*PMI's Talent Triangle Breakdown*

Technical - 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

*(Continued on next page)*

## **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
- Examining 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**  
***CEU*s - 0.70**

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

Leadership - 6.50

## **PMI's Certification Breakdown**

PMP - 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  
*CEU*s - 0.70

*PMI's Certification Breakdown*  
PMP - 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

*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 12.75

Strategic - 0.25

## PMI's Certification Breakdown

PMP - 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  
*CEU*s - 0.70

## *PMI's Talent Triangle Breakdown*

Leadership - 6.50

## *PMI's Certification Breakdown*

PMP - 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 difference 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*

*CEUs - 0.70*

## *PMI's Talent Triangle Breakdown*

Leadership - 6.50

## *PMI's Certification Breakdown*

PMP - 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  
***CEU***s – 0.70

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

Technical - 6.50

## **PMI's Certification Breakdown**

PMP - 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 time table 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 estimate

### **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

*(Continued on next page)*

## **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  
*CEU*s - 0.70

*PMI's Talent Triangle Breakdown*  
Leadership - 7.00

*PMI's Certification Breakdown*

PMP - 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  
*CEU*s - 1.4

*PMI's Talent Triangle Breakdown*  
Leadership - 14.00

*PMI's Certification Breakdown*  
PMP - 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

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- 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**  
***CEU*s - 2.0**

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

Technical - 6.50  
Leadership - 6.50  
Strategic - 6.50

## **PMI's Certification Breakdown**

PMP - 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  
*CEU*s - 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 10.75  
Leadership - 0.25  
Strategic - 2.00

## *PMI's Certification Breakdown*

PMP - 13.00  
PMI-ACP - 13.00  
PMI-SP - 2.25  
PMI-RMP - 2.25  
PfMP - 2.25  
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 measureable 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 *Microsoft Project 2003 Professional* to work through example modules and create their own project plan.

## **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

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## **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 to 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 2010 Basics - 1 Day

***PDU***s - 6.5  
***CEU***s - 0.70

***PMI's Certification Breakdown***  
PMP - 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 2010*. 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 2010 Professional* to work through example modules and create their own project plan.

## ***Course Objectives:***

### **Objective 1: Examine the Microsoft Project Environment**

- Review new features with *MS Project 2010 Professional*
- Examine the Backstage view
- Examine the Fluent (Ribbon) interface and Quick Access toolbar
- Tour the MS Project workspace environment
- Examine MS Project templates

### **Objective 2: Create a Project Plan and Tasks**

- Create and Assign a Project Calendar
- Setting Nonworking days in a Project Plan
- Examine how to add Tasks to the Project Plan file
- 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 the Project Plan File
- Examine documenting tasks with Notes and Hyperlinks
- Examine how to set a Task Deadline

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## **Objective 3: Examine how to input Project**

### **Resources**

- Create a Resource Calendar
- Discuss Resource naming
- Examine how to enter Resources in the Project Plan
- Examine how to enter Resource Capacity
- Examine how to enter Resource Pay Rates
- Examine how to Adjust Working Time for Individual Resources
- Examine how to Setup Cost Resources
- Examine how to document Resources using Notes

## **Objective 4: 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

## **Objective 5: Examine how to Track Progress on**

### **Tasks**

- 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 6: 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 2010 Intermediate - 1 Day

***PDU***s - 6.5  
***CEU***s - 0.70

**PMI's Certification Breakdown**  
PMP - 6.50

**PMI's Talent Triangle Breakdown**  
Technical - 6.50

***Course Description:*** This course will build upon the skills learned in the *Microsoft Project 2010 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 2010 Professional* to work through example modules and create their own project plan.

## ***Course Objectives:***

### **Objective 1: Examine how to Fine-Tune Task**

#### **Details**

- Examine how to Adjust Task Relationships
- Examine how to Set Task Restraints
- Examine how to enter Interrupted Work on a Task
- Examine how to Adjust Working Time for Individual Tasks
- Examine how to Change Task Types
- Discuss Assignment Units and Peak Units
- 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
- Examine how to Inactivate a Task

### **Objective 2: Examine how to Fine-Tune Resource**

#### **Details**

- Examine how to Setup Resource Availability to Apply at Different Times
- Examine how to Enter Multiple Rates for a Resource
- Examine how to Setup Pay Rates to Apply at Different Times
- Examine how to Setup Material Resources

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

#### **Assignment Details**

- Examine how to Delay the Start of Assignments
- Examine how to Apply Contours to Assignments
- Examine how to Apply Different Cost Rates to Assignments
- Examine how to Assign Material Resources to Tasks

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- Discuss Variable Consumption Rates for Material Resources
- Examine how to View Resource Capacity
- Examine how to Adjust Assignments in the Team Planner View

Values for Tasks and Assignments

- Examine how to Track Timephased Actual Work for Tasks and Assignments
- Discuss Collecting Actuals from Resources
- Examine how to Reschedule Incomplete Work

## **Objective 4: 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

## **Objective 5: 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 Customize Tables
- Discuss Custom Fields
- Examine how to Customize Views

## **Objective 6: 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

## **Objective 7: 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 8: Examine how to Get 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 2010 Advanced - 1 Day

***PDU***s - 6.5  
***CEU***s - 0.70

## **PMI's Certification Breakdown**

PMP - 6.50  
PMI-RMP - 6.50

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

Technical - 6.50

***Course Description:*** This course will build upon the skills learned in the *Microsoft Project 2010 Intermediate* course. After completing this focused course, students will be prepared to customize the project working environment, project information, and reporting in the project. Additionally, students will have the confidence to handle resources across large or multiple projects.

***Method of teaching:*** *Students will use Microsoft Project 2010 Professional to work through example modules and create their own project plan.*

## ***Course Objectives:***

### **Objective 1: Examine how to Apply Advanced Formatting and Printing**

- Examine how to Format a Gantt Chart View
- Examine how to Format a Timeline View
- Examine how to Format a Network Diagram View
- Examine how to Format a Calendar View
- Examine Advanced Options for Printing Views
- Examine Advanced Options for Printing Reports

### **Objective 2: Examine how to Customize Microsoft Project**

- Examine how to Share Custom Elements Between Project Plans
- Examine how to Record Macros
- Examine how to Edit Macros
- Examine how to Customize the Ribbon and Quick Access Toolbar

### **Objective 3: Examine how Share Project Information with Other Programs**

- Examine how to Copy Project Data to Other Programs
- Examine how to Open Other File Formats in Project
- Examine how to Save Other File Formats in Project
- Examine how to Generate Visual Reports Using Excel and Visio
- Discuss Synchronizing Task List Between Project and SharePoint

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## **Objective 4: Examine how to Consolidate Projects**

### **and Resources**

- Create a 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 All Plans' Working Times in Resource Pool
- Examine how to Link New Project Plans to a Resource Pool
- Examine how to Open a Sharer Plan and Update a Resource Pool
- Examine how to Consolidate Project Plans
- Examine how to Create Dependencies Between Projects

# Performance Improvement - 2 Day

## *Impacting the Quality of Your Organization*

***PDU's - 13***

***CEUs - 1.3***

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

Technical - 8.00

Leadership - 3.50

Strategic - 1.50

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

PMP - 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

- Discuss symptoms of quality concerns
- Identify a continuous improvement team's concern
- Discuss ways to reduce resistance from organizations
- 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

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## **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

## **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***  
***CEUs - 0.70***

***PMI's Certification Breakdown***  
PMP - 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

#### **Objective 4: Examine the planning process group**

- Discuss the Develop Project Management Plan process
- Discuss the Plan Scope Management process
- Discuss the Define Scope process
- Discuss the Create WBS process
- Discuss the Sequence Activities process
- Discuss the Estimate Activity Durations process
- Discuss the Develop Schedule process

- Discuss the Estimate Costs process
- Discuss the Determine Budget process
- Discuss the Plan Quality Management process
- Discuss the Plan Communications Management process
- Discuss the Plan Risk Management process
- Discuss the Identify Risks process
- Discuss the Plan Procurement Management process

#### **Objective 5: Examine the executing process group**

- Discuss the Direct & Manage Project Work process
- Discuss the Perform Quality Assurance process
- Discuss the Acquire Project Team process
- Discuss the Develop Project Team process

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## **Objective 6: Examine the monitoring & controlling process group**

- Discuss the Validate Scope process
- Discuss the Control Scope process
- Discuss the Control Schedule process
- Discuss the Control Costs process
- Discuss the Control Risk process

## **Objective 7: Examine the closing process group**

- Discuss the Close Project or Phase process
- Discuss the Close Procurements process

# Proactive Communication and Interview Skills for Gathering Business Requirements - 1 Day

*PDU*s - 6.5  
*CEU*s - 0.70

## PMI's Talent Triangle Breakdown

Technical - 3.25  
Leadership - 3.25

## PMI's Certification Breakdown

PMP - 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 to 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  
*CEU*s - 1.3

*PMI's Certification Breakdown*  
PMP - 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 - 2 Day

## *How to Implement, Track, and Control Project Changes*

***PDU's - 13***  
***CEUs - 1.3***

***PMI's Certification Breakdown***  
***PMP - 13.00***

***PMI's Talent Triangle Breakdown***  
***Technical - 13.00***

***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

- Compare four ways people respond to change
- Discuss when to create change quickly or gradually
- 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

#### **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 for 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
- Analyze the roles and responsibilities of change control board
- 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
- 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***

***CEUs - 2.0***

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

Technical - 17.50

Strategic - 2.00

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

PMP - 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

- Discuss when to create change quickly or gradually
- 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

#### **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 for written change requests

*(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
- Analyze the roles and responsibilities of change control board
- List the benefits of documentation
- Analyze the impact of change

## **Objective 8: Define change control board (CCB)**

- Compare positive and negative CCBs
- 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 Communication Management – 1 Day

*PDU*s – 6.5  
*CEU*s – 0.70

## *PMI's Talent Triangle Breakdown*

Technical - 3.25  
Leadership - 3.25

## *PMI's Certification Breakdown*

PMP - 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

- 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 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

### **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 Communication Management - 2 Day

*PDU*s - 13  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 11.00  
Leadership - 2.00

## PMI's Certification Breakdown

PMP - 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 project meetings
- Evaluate receiving feedback on performance
- Design responses to negative project feedback

*(Continued on next page)*



## **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

## **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 Control Communications

# Project Cost Management - 1 Day

***PDU*s - 6.5**  
***CEU*s - 0.70**

**PMI's Certification Breakdown**  
PMP - 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 on 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

*(Continued on next page)*

## **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 Human Resource Management - 1 Day

***PDU*** - 6.5  
***CEU*** - 0.70

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

Technical - 3.25  
Leadership - 3.25

## **PMI's Certification Breakdown**

PMP - 6.50  
PMI-ACP - 6.50  
PMI-SP - 6.50  
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 human 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 four project human resource management processes:**

- Plan Human Resource Management
- Acquire Project Team
- Develop Project Team
- Manage Project Team

**Objective 2: Examine the process group of Plan Human Resource Management**

- Identify inputs and outputs
- Detail tools and techniques used in this process: organizational charts and position descriptions, networking, organizational theory, expert judgment, and meetings

**Objective 3: Examine the process group of Acquire Project Team**

- Identify inputs and outputs
- Detail tools and techniques used in this process: pre-assignment, negotiation, acquisition, virtual teams, and multi-criteria decision analysis

**Objective 4: Examine the process group of Develop Project Team**

- Identify inputs and outputs
- Detail tools and techniques used in this process: interpersonal skills, training, team building activities, ground rules, collocation, recognition and rewards, and personnel assessment tools

*(Continued on next page)*

## **Objective 5: Examine the process group of Manage**

### **Project Team**

- Identify inputs and outputs
- Detail tools and techniques used in this process: observation/conversation, project performance appraisals, conflict management, and interpersonal skills

## **Objective 6: Identify and examine motivation**

### **theories**

## **Objective 7: Identify and examine phases of**

### **performance management**

# Project Human Resources Management - 2 Day

*PDU*s - 13  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 4.00  
Leadership - 8.50  
Strategic - 0.50

## PMI's Certification Breakdown

PMP - 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 human 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 four major processes of project human resources**

- Detail the process of Plan Human Resource Management
- Detail the process of Acquire Project Team
- Detail the process of Develop Project Team
- Detail the process of Manage Project Team

## **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

### **Objective 5: Contrast different change strategies**

- Classify why project teams block change
- Choose ways to reduce project team resistance
- Evaluate changes which support goals

*(Continued on next page)*

## **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 for 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 Integration Management – 1 Day

*PDU*s – 6.5  
*CEU*s – 0.70

## *PMI's Talent Triangle Breakdown*

Technical - 5.50  
Leadership - 1.00

## *PMI's Certification Breakdown*

PMP - 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

*(Continued on next page)*



## **Objective 5: Examine steps in creating a project budget and developing a master budget control process**

- Discuss implementation of 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 three 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  
***CEU***s - 2.0

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

Technical - 15.50  
Leadership - 3.00  
Strategic - 1.00

## **PMI's Certification Breakdown**

PMP - 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 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 three 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  
***CEU***s - 0.70

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

Technical - 6.00  
Leadership - 0.50

## **PMI's Certification Breakdown**

PMP - 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

*(Continued on next page)*

## **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**

***CEU*s - 1.4**

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

Technical - 13.00

Leadership - 0.50

## **PMI's Certification Breakdown**

PMP - 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

*(Continued on next page)*

## **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  
*CEU*s – 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 12.00  
Leadership - 1.00

## *PMI's Certification Breakdown*

PMP - 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 all together. 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 2: Examine the mistake of top-down planning**

**Objective 3: Examine the mistake of vague roles and responsibilities definition**

**Objective 4: Examine the mistake of little accountability when productivity is low**

**Objective 5: Examine the mistake of an unrealistic timeline**

**Objective 6: Examine the mistake of a limited risk analysis**

**Objective 7: Examine the mistake of a poor communication plan**

**Objective 8: Examine the mistake of no project audits**

**Objective 9: Examine the mistake of turf battles**

**Objective 10: Examine the mistake of not monitoring the critical path**

**Objective 11: Examine the mistake of conflict with culture and project command**

**Objective 12: Examine the mistake of overcommitting team members**

**Objective 13: Examine the mistake of not confronting the status quo**

**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  
*CEU*s – 2.0

## *PMI's Talent Triangle Breakdown*

Technical - 18.00  
Leadership - 1.50

## *PMI's Certification Breakdown*

PMP - 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 all together. 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**

*(Continued on next page)*

**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***

***CEUs - 2.0***

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

Technical - 17.00

Leadership - 1.50

Strategic - 1.00

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

PMP - 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  
*CEU*s - 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 12.00  
Leadership - 0.75  
Strategic - 0.25

## *PMI's Certification Breakdown*

PMP - 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  
*CEU*s - 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 12.50  
Strategic - 0.50

## *PMI's Certification Breakdown*

PMP - 13.00  
PMI-ACP - 0.50  
PMI-SP - 1.50  
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 in 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  
***CEU***s - 0.70

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

Technical - 6.00  
Leadership - 0.50

## **PMI's Certification Breakdown**

PMP - 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

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## **Objective 6: List price and budgeting requirements**

- Examine interpreting changes
- Analyze the termination of contracts
- Discover how to handling appeals and disagreements in contract
- 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
- Detail the process of Close Procurements

# Project Quality Assurance, Monitoring and Auditing - 2 Day

*PDU*s - 13  
*CEU*s - 1.3

*PMI's Certification Breakdown*  
PMP - 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  
***CEU***s - 0.70

***PMI's Certification Breakdown***  
PMP - 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 Perform Quality Assurance
- 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  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 12.75  
Leadership - 0.25

## PMI's Certification Breakdown

PMP - 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*<sup>®</sup> *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 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 Perform Quality Assurance
- 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 Risk Management - 1 Day

***PDU*s - 6.5**  
***CEU*s - 0.70**

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

Technical - 5.75  
Strategic - 0.75

## **PMI's Certification Breakdown**

PMP - 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 to confronting risk
- Examine how to conduct 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 managing 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 Control Risks

# Project Risk Management - 2 Day

***PDU's - 13***  
***CEUs - 1.3***

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

Technical - 12.75  
Strategic - 0.25

## **PMI's Certification Breakdown**

PMP - 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 to 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
- Examine data gathering

### **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 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 Control Risks



# Project Risk Management Advanced - 2 Day

*PDU*s - 14

*CEU*s - 1.4

## *PMI's Talent Triangle Breakdown*

Technical - 14.00

## *PMI's Certification Breakdown*

PMP - 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 with 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 Scheduling - 2 Day

*PDU*s - 14  
*CEU*s - 1.4

## PMI's Certification Breakdown

PMP - 14.00  
PMI-SP - 14.00

## PMI's Talent Triangle Breakdown

Technical - 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**  
***CEU*s - 0.70**

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

Technical - 6.25  
Leadership - 0.25

## **PMI's Certification Breakdown**

PMP - 6.50  
PMI-ACP - 0.25  
PMI-SP - 1.50  
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 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
- Develop a critical path
- Examine scheduling changes and adjustments
- Discuss controlling the schedule

### **Objective 4: Evaluate a real time line**

- 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  
*CEU*s - 1.3

*PMI's Certification Breakdown*  
PMP - 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*<sup>®</sup> *Guide*.

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

## **Course Objectives:**

### **Objective 1: Create scope requirements for 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 time line**

- Evaluate why time calculations are wrong

### **Objective 6: Analyze strengths and weaknesses of a Gantt chart**

- Develop a critical path
- 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 7: Examine steps to create a project budget and develop a master budget control process**

- Discuss implementation of project plan

# Project Stakeholder Management - 1 Day

*PDU*s - 6.5  
*CEU*s - 0.70

## *PMI's Talent Triangle Breakdown*

Technical - 5.50  
Leadership - 1.00

## *PMI's Certification Breakdown*

PMP - 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 four project stakeholder management processes**

**Objective 2: Examine the process of Identify Stakeholders**

**Objective 3: Examine the process of Plan Stakeholder Management**

**Objective 4: Examine the process of Manage Stakeholder Engagement**

**Objective 5: Examine the process of Control 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**

# Project Time Management - 1 Day

***PDU*s - 6.5**  
***CEU*s - 0.70**

## **PMI's Certification Breakdown**

PMP - 6.50  
PMI-SP - 6.50

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

Technical - 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 time 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 Resources
- Examine the process of Estimate Activity Duration
- Examine the process of Develop Schedule
- Examine the process of Control Schedule

# Project Time Management - 2 Day

*PDU*s - 13  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 10.00  
Leadership - 3.00

## PMI's Certification Breakdown

PMP - 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 and in meetings
- Formulate time tips on personal habits
- Evaluate how to organize yourself

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## Objective 5: Define time 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 Resources
- Examine the process of Estimate Activity Duration
- Examine the process of Develop Schedule
- Examine the process of Control Schedule



# Role & Responsibility of a Business Analyst in an Agile Methodology - 1 Day

*PDU*s - 6.5  
*CEU*s - 0.70

*PMI's Talent Triangle Breakdown*  
Technical - 6.50

*PMI's Certification Breakdown*

PMP - 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 - 2 Day

*PDU*s - 13

*CEU*s - 1.3

## *PMI's Talent Triangle Breakdown*

Technical - 6.75

Leadership - 6.00

Strategic - 0.25

## *PMI's Certification Breakdown*

PMP - 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 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

# Use Case Modeling - 2 Day

*PDU*s – 13  
*CEU*s - 1.3

*PMI's Certification Breakdown*  
PMP - 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

*(Continued on next page)*

**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  
***CEU***s – 0.70

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

Technical - 4.00  
Leadership - 1.00  
Strategic - 2.00

## **PMI's Certification Breakdown**

PMP - 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

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- 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***  
***CEUs - 2.0***

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

Technical - 15.75  
Leadership - 1.25  
Strategic - 2.50

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

PMP - 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***

***CEUs - 3.0***

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

Technical - 19.50

Leadership - 4.00

Strategic - 6.50

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

PMP - 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

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## **Objective 11: Define the processes in project integration**

- 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 Monitor & Control Project Work
- Examine the process of Perform Integrated Change Control
- Examine the process of Close Project or Phase

### ***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 devils advocate in project teams
- 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

## **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

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## ***Project Time 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

### **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

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## ***Project 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

### **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**  
**CEUs - 3.0**

### PMI's Talent Triangle Breakdown

Technical - 18.00  
Leadership - 2.50  
Strategic - 9.50

### PMI's Certification Breakdown

PMP - 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 of 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 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 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 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

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## 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***

***CEUs - 3.0***

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

Technical - 9.25

Leadership - 5.75

Strategic - 15.00

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

PMP - 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 handling appeals, disagreements in contract
- Examine contract closeout planning

## ***Project 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**

*(Continued on next page)*

## 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

## 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
- 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

*(Continued on next page)*

## **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***

***CEUs - 3.0***

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

Technical - 13.50

Leadership - 12.00

Strategic - 4.50

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

PMP - 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***

##### **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 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**

***CEU*s - 3.0**

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

Technical - 14.00

Leadership - 12.00

Strategic - 4.00

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

PMP - 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***

#### **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

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## *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 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**

***CEU*s - 3.0**

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

Technical - 19.00

Leadership - 6.00

Strategic - 5.00

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

PMP - 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 charting
- Discuss the strengths and weaknesses of CPM charting

### *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 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

### **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

*(Continued on next page)*

## 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?
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- Requirements Traceability
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- Overview of Resource Planning
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- Define Assumptions

## RISK MANAGEMENT PLAN

- Identify Risks
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- Risk Management Worksheet Instructions
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- 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***

***CEUs - 3.0***

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

Technical - 13.50

Leadership - 12.50

Strategic - 4.00

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

PMP - 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 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

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## **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 in 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 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

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## **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**  
**CEUs - 3.5**

### PMI's Talent Triangle Breakdown

Technical - 30.25  
Leadership - 3.75  
Strategic - 1.00

### PMI's Certification Breakdown

PMP - 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. 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 - 5<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 Time Management
- Project Cost Management
- Project Quality Management
- Project Human 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 - 5<sup>th</sup> Edition*
- *PMP® Study Guide 8<sup>th</sup> Edition* by Kim Heldman

# PMI-ACP® Exam Prep Boot Camp

*PDU*s - 21  
*CEU*s - 2.1

## PMI's Talent Triangle Breakdown

Technical - 15.75  
Leadership - 5.25

## PMI's Certification Breakdown

PMP - 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

# Creating a Successful Project Business Case

*PDU*s – 13

*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 12.75

Strategic - 0.25

## PMI's Certification Breakdown

PMP - 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

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## **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

*CEU*s - 1.4

## *PMI's Talent Triangle Breakdown*

Leadership - 14.00

## *PMI's Certification Breakdown*

PMP - 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

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- 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

# Microsoft Project 2007 Basics

***PDU***s – 6.5  
***CEU***s - 0.70

***PMI's Certification Breakdown***  
PMP - 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 2007. 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 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: Create a Project Plan File**

- Create and Assign a Project Calendar
- Examine how to add Tasks to the Project Plan File
- Examine how to add a Project Summary Task
- Examine how to add a Recurring Task
- Examine how to enter Task Duration Estimates
- Create a Work Breakdown Structure (WBS)
- Examine how to outline WBS Tasks
- Examine how to link Dependent Tasks
- Identify Deliverables in the Project Plan File
- Examine how to constrain WBS Tasks
- Examine how to set a Task Deadline

### **Objective 2: Examine how to input Project**

#### **Resources and Costs**

- Create a Resource Calendar
- Examine how to assign Resources
- Examine how to assign Additional Resources to a Task
- Examine how to resolve Resource Conflicts

### **Objective 3: Analyze the Critical Path**

- Discuss how to shorten the Project Duration
- Examine how to save a Baseline
- Examine how to display Project Summary Information
- Examine how to finalize the Project Plan



# Microsoft Project 2007 Intermediate

*PDU*s – 6.5  
*CEU*s - 0.70

*PMI's Certification Breakdown*  
PMP - 6.50

*PMI's Talent Triangle Breakdown*  
Technical - 6.50

**Course Description:** This course will build upon the basic skills students learned in the Microsoft Project 2007 Basics course. This course will go beyond simply preparing a Project Plan and actually look at the skills needed to use Microsoft Project during the Project Implementation phase. By the end of this course, students will be able to exchange project plan data with other software applications, update current and past project plans, produce custom reports in a variety of Medias, and reuse project plan information in other current or future projects.

**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 how to Import/Export**

#### **Project Plan Data with other Software Programs**

- Examine how to Import a Task List from an Excel File into a New Project Plan
- Create a Custom Import Map
- Examine how to Export Project Plan Cost Data into Excel
- Examine how to copy a Picture into a Word Document

### **Objective 2: Examine how to enter Task Progress**

#### **Information**

- Examine how to view Task Progress
- Examine how to Split a Task
- Examine how to Reschedule a Task
- Examine how to Filter a Task in a Project Plan
- Examine how to Save an Interim Project Plan

### **Objective 3: Create a Custom Table**

- Examine how to Add Custom Columns to a Table
- Examine how to Hyperlink Document to Tasks

### **Objective 4: Create a Custom Report**

- Examine how to Modify a Custom Report's Header and Footer
- Examine how to Add a Picture to a Report
- Examine how to Modify a Custom Report's Margins
- Examine how to Print a Custom Report

### **Objective 5: Create a Project Plan Template**

- Create a Custom Combination View
- Examine how to Make Custom Views Available to Other Project Plans
- Examine how to Share Resources
- Create a Master Project Plan

# Project Communication Management

***PDU*s - 13**  
***CEU*s - 1.3**

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

Technical - 11.00  
Leadership - 2.00

## **PMI's Certification Breakdown**

PMP - 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 Control Communications

# Project Cost Management

***PDU***s – 6.5  
***CEU***s - 0.70

***PMI's Certification Breakdown***  
PMP - 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 on 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

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## **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  
*CEU*s - 0.70

*PMI's Certification Breakdown*  
PMP - 6.50

*PMI's Talent Triangle Breakdown*  
Technical - 6.50

**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

### **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

*(Continued on next page)*

## **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  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 12.00  
Leadership - 0.75  
Strategic - 0.25

## PMI's Certification Breakdown

PMP - 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  
*CEU*s - 2.5

## *PMI's Talent Triangle Breakdown*

Technical - 19.00  
Leadership - 6.00

## *PMI's Certification Breakdown*

PMP - 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

*(Continued on next page)*

- 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 Workslope**

- Define Workslope
- 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  
*CEU*s - 2.5

## *PMI's Certification Breakdown*

PMP - 25.00  
PMI-RMP - 3.00

## *PMI's Talent Triangle Breakdown*

Technical - 25.00

**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

*(Continued on next page)*

- 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  
*CEU*s - 1.3

*PMI's Certification Breakdown*  
PMP - 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  
*CEU*s - 1.3

## PMI's Talent Triangle Breakdown

Technical - 12.75  
Strategic - 0.25

## PMI's Certification Breakdown

PMP - 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
- Discuss system risk
- Discuss process risk
- 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 to confronting risk
- Examine how to conduct risk analysis
- Examine ranking
- Discuss scenario
- Examine statistical process control
- Describe risk turmoil
- Discuss performance 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

*(Continued on next page)*

## **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 Control Risks

# Vendor Management

## *Managing, Monitoring and Controlling*

### *Vendor Relationships*

***PDU*s - 19.5**  
***CEU*s - 2.0**

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

Technical - 15.75  
Leadership - 1.25  
Strategic - 2.50

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

PMP - 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

*(Continued on next page)*



## 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