

# MILESTONE

*Providing Stepping Stones  
Along the Path to Success*



A WOMAN-OWNED  
SMALL BUSINESS

STRATEGIC  
VISIONARIES

Organizations today operate in an environment defined by rapid technological shifts, evolving customer expectations, and constant competitive pressure. In this landscape, strategic visionaries play a critical role. They do more than manage projects or balance portfolios – they illuminate the path toward future value. Their work is not simply about choosing the right initiatives; it’s about shaping the conditions for long-term relevance, resilience, and growth. They help organizations stay oriented amid uncertainty, ensuring that decisions made today strengthen tomorrow’s possibilities.

### ***From Portfolio Management to Portfolio Leadership***

Traditional portfolio management focuses on alignment, prioritization, and resource allocation. Strategic visionaries elevate this work by adding a forward-looking lens. They ask not only “Does this initiative support our strategy?” but “Will this initiative still matter in the future we’re moving toward?” This shift transforms portfolio oversight into portfolio leadership – an active, intentional practice of guiding investments toward emerging opportunities rather than merely sustaining the status quo. It reframes the portfolio as a living system that must evolve alongside the environment it serves.

### ***Sensing Signals and Anticipating Change***

Visionaries excel at detecting early signals – technological disruptions, demographic shifts, regulatory changes, and cultural trends. They translate these signals into strategic insights that shape portfolio decisions. Instead of reacting to change, they prepare the organization to meet it with confidence. Their ability to anticipate rather than respond allows them to position the portfolio for value creation that compounds over time, strengthening the organization’s capacity to adapt with purpose rather than urgency.

### ***Balancing Innovation and Stability***

Future-oriented portfolios require a thoughtful balance between exploratory initiatives and core operational investments. Strategic visionaries understand that innovation without stability is chaos, while stability without innovation is stagnation. They cultivate a portfolio mix that protects essential capabilities while creating space for experimentation, learning, and breakthrough ideas. This balance ensures that organizations remain both grounded and adaptable, capable of delivering today while preparing for what’s next.

### ***Creating the Conditions for Value to Grow***

Visionaries know that value creation is not an outcome; it’s a system. They foster cross-functional collaboration, encourage transparent decision-making, and build governance structures that support agility rather than constrain it. They champion psychological safety so teams can challenge assumptions and propose bold ideas. Through these practices, they create an environment where strategic intent becomes shared action and where innovation can take root and scale.

Strategic visionaries guide portfolios not by predicting the future, but by preparing organizations to thrive within it. Their leadership helps teams navigate uncertainty, invest wisely, and pursue opportunities that generate meaningful, sustainable value. In a world where change is constant, their ability to see what’s emerging (and act on it) becomes one of the most powerful drivers of organizational success.

## **UPCOMING FREE WEBINAR**

### **STRATEGIC VISIONARIES: GUIDING PORTFOLIOS TOWARD FUTURE VALUE CREATION**

**MONDAY, APRIL 6**

**10:00 - 11:00 AM CST**

**1 PDU**

**TO REGISTER, GO TO**

**[www.themathisgroup.com/webinars](http://www.themathisgroup.com/webinars)**



**SATISFIED CLIENT  
OF THIS COURSE**

**AMEREN**

# PROJECT RESOURCE MANAGEMENT - 1 DAY

*PDU*s - 6.5

## PMI's Talent Triangle Breakdown

Ways of Working - 3.25

Power Skills - 3.25



virtual  
instructor-led

**Course Description:** In this one-day course, participants will focus on the area of resources in a project. This area includes the processes that organize, manage, and lead the project team. This course will follow one or more of Project Management Institute's knowledge areas of the *PMBOK® Guide*.

## Course Objectives:

### **Objective 1: Define the processes of Project Resource Management**

Examine the process of Plan Resource Management  
Examine the process of Estimate Activity Resources  
Examine the process of Acquire Resources  
Examine the process of Develop Team  
Examine the process of Manage Team  
Examine the process of Control Resources

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

Identify inputs and outputs

Detail tools and techniques used in this process: expert judgment, data representation, organizational theory, and meetings

### **Objective 3: Examine the process group of Estimate Activity Resources**

Identify inputs and outputs

Detail tools and techniques used in this process: expert judgment, bottom-up estimating, analogous estimating, parametric estimating, data analysis, project management information system, meetings

### **Objective 4: Examine the process group of Acquire Resources**

Identify inputs and outputs

Detail tools and techniques used in this process: decision-making, interpersonal and team skills, preassignment, and virtual teams

### **Objective 5: Examine the process group of Develop Team**

Identify inputs and outputs

Detail tools and techniques used in this process: collocation, virtual teams, communication technology, interpersonal and team skills, recognition and rewards, training, individual and team assessments, and meetings

### **Objective 6: Examine the process group of Manage Team**

Identify inputs and outputs

Detail tools and techniques used in this process: interpersonal and team skills and project management information system

### **Objective 7: Examine the process group of Control Resources**

Identify inputs and outputs

Detail tools and techniques used in this process: data analysis, problem-solving, interpersonal and team skills, project management information system

### **Objective 8: Identify and examine motivation theories**

### **Objective 9: Identify and examine phases of performance management**



A WOMAN-OWNED SMALL BUSINESS (WOSB)



Providing quality, customized training and consulting services that inspire, educate, and equip organizations to be better tomorrow than they are today.

DR. KEITH MATHIS, PMP, PMI-ACP, CSP-SM, CSP-PO
WANDA MATHIS, M.ED. PMI-ACP

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

www.themathisgroup.com

keith@themathisgroup.com
wanda@themathisgroup.com

DUNS Number: 007722098
CAGE: 3C1N9
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# 2026 WEBINARS

## APRIL 6 - STRATEGIC VISIONARIES:

Guiding Portfolios Toward Future Value Creation

## MAY 22 - AI AS YOUR PROJECT LEADERSHIP ASSISTANT:

Quick Drafts, Rapid Brainstorming, and Efficient Content Creation

## JUNE 16 - MAKING IT STICK:

Ensuring Lessons Learned Become Lessons Applied

## JULY 17 - INVENTING TOMORROW'S METRICS:

Shaping the Future of Project Management

## AUGUST 7 - BUILDING RESILIENT PROJECTS:

Thriving in Times of Disruption

## SEPTEMBER 11 - CYBERSECURITY IN PROJECTS:

Protecting Your Data, Teams, and Reputation

## OCTOBER 16 - BEYOND MILLENNIALS:

Leading Multi-Generational Project Teams for Impact

## NOVEMBER 13 - LEADING HYBRID TEAMS:

Aligning, Adapting, and Delivering Results

## DECEMBER 4 - LEADING STRATEGIC RISK:

Preparing Today for Tomorrow's Disruptions

We know that it can be hard to schedule continuing education for your team. We offer free monthly webinars that can be watched as an individual or a group. This 1-hour of training can be used to hone skills that your team needs. We include a Webinar + Notes with discussion questions to guide your group to learn from each other. If you can't make it to the live session, a replay link will be sent out.

Register for our 2026 webinars today at [www.themathisgroup.com/webinars](http://www.themathisgroup.com/webinars)

# 2026 PMP® EXAM PREP BOOT CAMPS

APRIL 20-23

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