



## Seminar Workshops (typically 4-15 hours)

### **Action-Oriented Leadership: Leadership Principles**

This course is designed to address common challenges and issues facing group leaders, managers, and supervisors. We will cover how to run efficient and effective meetings and to create an environment that encourages motivation and open communication.

The day is punctuated periodically with challenging interactive sessions in which participants practice the principles that will be used to guide them through difficult management scenarios, including conflict resolution, dealing with emotional behavior, and coaching employees for improved performance. We will dynamically discuss current topics that impact the workplace in profound ways, including the effects of cultural and generational diversity, and how to affect change in a positive way. Topics for the day include: communication, team building, time management, conflict resolution, diversity, leadership, managing change, and ethics.

### **Agile Project Management: Applying Agile Principles in Traditional Project Environments**

Agile. A buzzword? A methodology? A way of thinking? Yes. It's all of these things and more and you may have even heard it enough that you're starting to think it's yesterday's fad. Think again! Agile development simply means operating successfully within a change-driven environment and this mentality is just coming of age and being widely accepted in both the private and public sectors as a valid methodology. Originally developed as a set of software-development methodologies, the project management industry has come to accept the reality that we are all working within a change-driven environment.

Project development lifecycles from the traditional (waterfall) through iterative and to adaptive (agile) have a doctrine for dealing with change. They may vary from resistance to open acceptance but the one constant is change. How we deal with dynamic inputs and moving targets often marks the difference between success and failure.

In this workshop, we will examine various aspects of project management including communications, stakeholder engagement, risk management and more, from the perspective of the project manager who has to deal with constantly changing goals, requirements and other environmental factors. Whether you are an experienced agilist, a purist or a hybrid advocate, or just thinking about "going agile", this workshop will help you apply flexibility to a wide spectrum of project management challenges.

### **Agile Project Management: Two (2) Courses**

Whether you believe Agile is a fad, a trend, a best practice, a buzzword or just plain nonsense, one thing is for certain; if you are a practicing Project Manager or plan to become one then you will need more than a basic understanding of Agile principles. This will be true for at least the next four years because that is the frequency of updates to the Guide to the Project Management Body of Knowledge (PMBOK® Guide), the worldwide standard for the practice of Project Management. The sixth edition, released in 2017, has defined the genesis of an era of integration of Agile and Traditional Project Management techniques, methodologies, and guidelines.

The evolution toward more agility and value-driven project management is highlighted by the inclusion of Agile principles throughout edition six of the PMBOK® Guide as well as the publication of The Agile Practice Guide, a



very useful guide to the principles of Agile which is the result of a first-time collaboration between The Agile Alliance and the Project Management Institute (PMI).

We are pleased to offer two Agile workshops; Agile Basics and Agile Techniques in a Traditional World. Through interactive discussions and practical hands-on activities, you will learn the terminology, various methods, and best practices associated with Agile Project Management. Dig deep into this new era of hybrid development approaches to find ways to optimize your team's performance!

## Agile Basics

In the Agile Basics workshop, we will discuss various methodologies including Scrum, Kanban, and hybrid methods. We will contrast and compare with traditional techniques so that you can decide why, when and how to implement Agile in your project environment. Discussions and exercises will include the following topics:

- What is Agile Project Management?
- A review of Agile methodologies
- Agile Communication Techniques
- Gamifying Your Projects
- Continuous Improvement

As a result of this course, students will: be able to define the Agile mindset and the proper application of Agile principles; understand the application of various common Agile methodologies; and learn several specific techniques that can be applied readily in the workplace.

## Agile Techniques in a Traditional World

We project managers often find ourselves caught between two worlds. The strategic levels of management need us to drive continuously improving results while providing accurate predictions of performance. To meet these challenges, we may select a development lifecycle that supports a change-driven environment while focusing on delivery of business value. We may choose an Agile approach. While managing an Agile team we need to provide traditional data and information, often in a traditional way. In this workshop, we will discuss these issues and learn to identify those areas that can be Agile, and those areas that should be managed in a more traditional manner. Finding new ways to customize and tailor your project management approach will help your teams to reach those goals! Discussions and exercises will include the following topics:

- Value-Driven Delivery
- Stakeholder Engagement & Communications
- Risk Management
- Team Performance
- Tracking and reporting results

As a result of this course, students will: understand basic Agile principles, terminology and common methodologies; be able to identify areas where Agile techniques can and should be applied; and learn to manage with a focus on early and continuous delivery of business value.

## Bottom Line Focus: Improving Efficiency and Effectiveness

In this session, the focus will be on returning positive business value for time invested. The reduction of effort spent on activities that do not return value to the business is essential to improving resource optimization. We will discuss ways to minimize activity that tend to reduce productivity while dynamically prioritizing work so that the important things get done first. Upon completion of this course, attendees will learn: to facilitate effective and productive meetings; to use Value Stream Analysis to improve process efficiency; and Time Management techniques to help them take control of their day.



## **Business Writing and Communication**

Writing is a key method of communication for most people, and it's an area where many people struggle. This workshop will give participants a refresher on basic writing concepts such as spelling, grammar, and punctuation. It will also provide an overview of the most common business documents such as proposals, reports, and agendas. All of this will provide that extra edge in the workplace.

Attendees will also discuss general communication issues and topics. There is a paradox in today's workplace in that our ability to communicate instantly, reliably and with very few geographic limitations seems to have an adverse impact on our ability to effectively transfer information between and among each other. Communication technology progress appears to be inversely proportional to effective communication. While the cause-and-effect aspect is debatable the symptom and results are not. Effective communication is a key to a less stressful and more productive workplace

## **Coaching and Mentoring for Accountability**

Confront without confrontation! Disagree while not being disagreeable! Authority may well be over-rated when it comes to team leadership. In this workshop we will discuss self-accountability and address the 'how' of getting to the core of conflict quickly and effectively. The avoidance of difficult management issues is one of the major causes of failure in the technical environment. Don't fall into that trap. Setting clear goals and managing performance is essential to your success! As a result of attending this workshop, students will be able to: exhibit leadership with or without authority; conduct performance management; handle difficult conversations; understand organizational structure and culture; and set objectives, goals and metrics.

## **Collaborative Communications Strategies**

One of the keys to building and maintaining a high-performance team is to ensure that communications are as effective as possible. Getting the right information to the right people at the right time is fundamental and yet often exceedingly difficult to do. Understanding the ways by which our communications may be misinterpreted helps us to be more concise and less ambiguous which leads to a more streamlined communications environment. According to the Project Management Institute (PMI)<sup>®</sup>, overall productivity gains as great as 30% can be realized by improving operational communications. In this course, attendees will learn: the importance of nuance in interpersonal communications; to apply effective techniques of aggressive listening to improve communications; and to manage difficult conversations and to disagree without being disagreeable.

## **Collaborative Communications Strategies: Negotiation Skills & Engagement Practices**

Improve the ability of the staff to work well with others, colleagues and counterparts alike, through better communication, increased understanding of each other and their needs, and strategies for finding productive common ground that leads to progress. This course will provide project managers with the tools and techniques needed to effectively negotiate resources and other issues when needed and effectively communicate with stakeholders to magnify and enhance their probability of success.

Attendees will come away with up-to-date methodologies that will enable them to navigate office politics through the use of creative communication strategies and an understanding of behaviors extending from various types of personalities. This course will include:

- Communications: office politics, relationships, conflict resolution, accountability, project charter
- Using negotiation successfully in collaborations and understanding basic types of negotiation
- Applying basic negotiation concepts: groundwork, bargaining, strategies for mutual gain
- Understanding how to reach consensus and set terms of agreement
- Dealing with difficult issues



## **Collaborative Communications Strategies: Interpersonal Skills**

In this engaging and interactive workshop, attendees will examine various enlightened approaches to conflict resolution to develop mutual satisfactory outcomes for scenarios that tend to lead to disagreements. In order to avoid costly and time-consuming litigation we need to go to the source of the disagreement and eliminate the cause. Litigation is often preceded by arbitration, which in turn is preceded by mediation and before that there is usually an argument which starts with a basic disagreement. This workshop will help the attendee to identify the source of the disagreement and negotiate a mutually satisfactory solution before it turns into an argument which may eventually result in a lawsuit. To do this it is necessary to distinguish between the rational or logical issues from the often contentious and usually irrational, or emotional, circumstances that lead to unresolvable dilemma. Tools and techniques are introduced through hands-on problem-solving sessions.

## **Communication and Team Development**

Success in the art of leadership requires a consistent and balanced response to various emotional reactions. The manager is not always in a position of delivering good news. Often, we have to challenge people, hold our employees accountable, drive success. Understanding emotional responses and mastering motivational techniques leads to an upwardly positive cycle in which the optimism and success of the team builds on itself to greater and greater success. This is characteristic of a highly performing team and it is the goal of every manager. Learning communications techniques and caring enough about your team members to learn what motivates them, what will help them get their jobs done, will absolutely propel your leadership career!

## **Conflict Resolution and Negotiation**

This class covers communication techniques and a deep dive into the negotiation process including strategies for creating win-win situations and dealing with difficult issues. Attendees will learn to improve their communication skills and facilitate the negotiations process by finding common ground and understanding their own needs and the needs of others.

## **Creatively Navigating Modern Work Issues**

Whether it's finding resources in a matrix management structure or balancing stakeholder expectations as scope creep challenges your planned schedule, the ability to find creative solutions is paramount to success in today's challenging environment! These problems represent very real situations that occur in many organizations and are quite often cited as the top issues facing managers today.

This workshop will help you flex and grow your creative muscles enabling you to face challenges head-on and work toward a more creative and motivational environment. As we are tasked with more responsibility and less resources, the out-of-the-box thinking methods become an essential component of the management toolbox.

## **Creative Problem Solving**

Are happy people productive or are productive people happy? Science has provided the answer to this age-old question. Numerous studies have proven that happiness wins. What can we do, as managers, to provide the opportunity, the motivation, the encouragement and the environment to allow our people to produce better results more quickly? This session will address those questions as we work toward a continuously improving positive environment that rewards free expression of thought while targeting results-oriented execution. After this class, attendees will understand the following:

- A structured approach
- Brainstorming
- Critical thinking
- Solution generation and selection
- Positivity and the importance of happiness in the workplace



## **Creative Problem Solving for Project Managers**

Problems come to Project Managers in many forms and from multiple directions. Are common problems such as scope creep and under-defined goals, or more difficult and complex challenges such as meeting client and stakeholder expectations in a dynamic and fast-moving development environment threatening the success of your project? Utilization of a Creative Problem Solving (CPS) process can lead to ideas and solutions which would have otherwise been overlooked.

This course will help attendees identify situations in which CPS may be beneficial and develop a process for employing CPS that can be applied immediately. In-class exercises will provide hands-on experience and practice. Whether you are currently PMP® certified or simply working in the field with project management responsibilities, you will be honing skills Project Managers need to have at their disposal in order to improve project execution results.

## **Delivering Outstanding Customer Services**

Achieving excellence in execution requires anticipation of customer needs and results-oriented responses. View your business through your customer's eyes. Objectively assess the next steps you need to take in order to provide the highest possible level of quality customer service! Topics will include:

- Your customers' perspective
- Appearance and positive energy
- Complaints, difficult customers, and anger
- Automated response systems: pros and cons
- Ten things you can do to WOW customers!

As a result of this course, students will be able to:

- State what customer service means in relation to all your customers, both internal and external
- Recognize how your attitude affects customer service
- Identify your customers' needs
- Use outstanding customer service to generate return business
- Build good will through in-person customer service
- Provide outstanding customer service over the phone
- Connect with customers through online tools

## **Delegating for Results**

Many of us are in leadership positions before we realize it has happened! Some of us even wanted to get there! Whether by our own design or as a result of circumstance we find ourselves in a position wherein people are looking to us for direction. People need information from us to get their work done! Ready or not here they come! Your followers. You don't need to have authority, power, or a title to be a leader. And while a lucky few folks are born with the innate ability to motivate and derive the best from others, and others may be endowed with enough charisma and charm to persuade people to perform at consistently high levels, it is important to know that most of us have the ability to learn leadership skills and through practice and introspection get better and better at driving outstanding results.

Join Lisa and Dave for a lively discussion about why authority is overrated and discover easy-to-implement, proven strategies that you can implement immediately to improve your execution results, reduce your stress and be ready to get up each morning eager to challenge the day and your team!



## Disciplined Agile Scrum Master (DASM) Certification Training

Begin your agile journey learning multiple agile approaches; understand how to use the Disciplined Agile tool kit and find your way of working (WoW). Comprehensive training introduces leading agile and lean approaches like Scrum, Kanban, SAFe® and more that frees you from any single agile framework and opens your options.

With DASM training and certification, you will:

- Understand the Disciplined Agile mindset and its underlying principles, such as pragmatism, the power of choice and adapting to context.
- Explore multiple leading agile and lean approaches like Scrum, Kanban, SAFe® and more.
- Learn about the fundamentals of agile and lean, and how to use both approaches effectively.
- Understand how to put these strategies into action on your agile team and ensure effective implementation.
- Learn how to apply the Disciplined Agile tool kit to discover the best way of working (WoW) for you and your agile team in your unique situation.
- Be prepared to take the Disciplined Agile Scrum Master (DASM) Certification exam.

## Dynamic Risk Management

While it is true that many of the project slowdowns and speed bumps that we hit shouldn't be there in the first place, it is not true that we have an excuse for anything less than excellence in execution. Experienced project managers understand that there are known unknowns - that not everything will go right or as planned. These unknowns will change throughout the project development lifecycle and therefore we must be equipped and prepared to deal with the constant fluctuation of inputs and challenges.

In this session, attendees will: discover a method of risk management that will allow you to get in front of the curve; provide the ability to deal with uncertainty as it occurs to help you succeed; and demonstrate how to predict and prevent problems before they occur.

## Effective and Engaged Staff

This class will include a review of the Leadership Techniques "Engagement Matrix" which provides a guideline as to the appropriate managerial direction based on the team member's behavior and performance. In discussing motivation and accountability we are advocates of Daniel Pink and Peter Drucker in that we believe that intrinsic motivation is far more valuable than extrinsic, and that people fundamentally want to do a good job. The topics included in this session include:

- Motivation
- Performance management
- The Leadership Techniques Engagement Matrix
- Communication
- Accountability
- Staff assessment and growth path

## Effective Leadership

Effective project management requires the judicious use of a unique combination of hard and soft skills. While the hard skills such as scheduling, budgeting, and risk management are fundamentally important it is the soft skills that often give us the most trouble. At the root of the soft skills is effective leadership. While leadership as a topic is ubiquitous, *effective* leadership can be elusive. Through discussion and interactive exercises this workshop will attack head-on many of the challenges that prevent leaders from being truly effective.



## Effective Leadership in Dynamic Environments

This class will focus on the importance of managing efficiently and effectively in a changing environment. Ethics in leadership and difficult situations as well as accountability will be examined. Attendees will learn the importance of facilitating effective meetings as well as techniques for delegation and motivation to optimize impact on positive results and eliminate wasteful energy and time expenditures.

## Effectively Leading Problem-Solving Sessions

This workshop will help you to flex and grow your creative muscles enabling you to face challenges head-on and work toward a more creative and motivational environment. As we are tasked with more responsibility and less resources, the out-of-the-box thinking methods become an essential component of the Project Management toolbox.

## Emotional Intelligence

It is increasingly important for today's leaders to understand the relationship between employee engagement, satisfaction, performance and happiness. Studies show that an increase in any of these is strongly related to increases in the others. So, for example, the more engaged a person is in their work, the more productive they will be. And vice versa for each combination. Understanding how to perceive and understand emotions and manage our own helps us increase all of these attributes!

## Facilitating Effective Meetings and Managing Time

We all love a good meeting, right? Well...yes! The key is to have a *good* meeting! And what is a good meeting? A meeting that people want to come to! A meeting in which they want to participate! It starts and ends on time and when they leave, they feel that they have accomplished something.

Meetings are a widely used and generally efficient communication tool with high costs in terms of time, efficiency, productivity, quality and employee engagement. Combining the topics of personal time management and meetings in this interactive workshop, we will discuss various techniques to enable attendees to manage their own time, run great meetings, minimize interruptions and help others to succeed through effective time management and meeting facilitation.

## The Happy Project Manager

Project Management Success means more than on-time and on-budget! We also have a responsibility to satisfy stakeholder expectations and an obligation to our team that includes managing stress levels and protecting them from evils such as scope creep and interruptions. Their time is sacrosanct! Join us on an exciting and entertaining journey through enlightened approaches to problem-solving. Learn to avoid costly and time-consuming delays by working toward root cause elimination. Share your ideas with peers and colleagues as positive approaches to conflict resolution are discussed. Discover how to use different approaches such as appreciative inquiry and the principles of emotional intelligence to propitiously influence behaviors related to anger and other emotionally charged behaviors. As a result of this course, attendees will: discuss positive motivational techniques in negotiations; be able to effectively manage behaviors related to anger; and understand how to employ appreciative inquiry to improve desired results

## The Happy Project Manager 2

The ability to effectively manage projects and understand the real-time status in terms of schedule and resources is absolutely critical to the success of businesses in every category today. A poorly executed project leads to organizational strife, employee stress, loss of revenue, personnel turnover, and worst of all; permanent, irreversible damage to your reputation. In this workshop you will learn the basic techniques of project management enabling you to quickly stand up a repeatable project management process that can have an immediate positive impact on your bottom line! Attendees will learn:



- Project planning
- Project schedule and budget estimation
- Stakeholder communications
- Project management software: evaluating your requirements
- Results measurement and reporting

## **The Happy Leader – Senior Leadership**

The happy leader senior leadership is a high-level overview, to include: leadership, management, and getting things done; delegating for results; and bottom line focus – improving efficiency and effectiveness.

## **Impactful Project Management (1 or 2 days)**

Examine the principles of Project Management skills by taking an in-depth look at the essential elements of scheduling, budgeting, and risk analysis. The course is taught by experienced Project Management Professionals (PMP)<sup>®</sup>s who will help you bring Project Management tools and techniques to life. Recommended for students in pursuit of the PMP<sup>®</sup> Certification.

## **Influential Leadership**

This class will explore qualitative and quantitative risk management theory and practice. We will also examine accountability techniques, change management principles and communication methods to address relationships and conflict resolution. Attendees will learn to proactively address challenges associated with conflicting personalities and relationship. Front line leaders will learn tools and techniques that can be applied immediately within their paradigm to affect positive change within their organization.

## **Leading with Style and Grace**

This workshop will give you a chance to hone your leadership skills. While sharing your knowledge and helping others grow in their career is a very fulfilling role for supervisors, remembering to model those behaviors that you want emulated throughout the organization can be challenging. The training will incorporate engaging discussions through activities to help you be better prepared for the day-to-day challenges of managing employees.

## **Leadership, Management, and Getting Things Done**

The difference between leadership and management is sometimes subtle and often an extraneous discussion. Excellence in business operations means optimizing both skill sets. Collaboration and communication are fundamental keys in creating an open and trusting environment that encourages staff to face problems head-on and create solutions! Topics will include:

- Collaborative communications
- Time and stress management
- Negotiations: making win-win-win deals
- Anger management and reinforcing a positive environment
- Effective delegation and results oriented execution

As a result of this course, students will be able to:

- Improve collaborative communications
- Manage their schedule and learn how to handle time and stress management
- Understand the process for negotiations: making win-win-win deals
- Deal with anger management and reinforce a positive environment
- Effectively delegate and implement a results-oriented environment





## **Leadership Training: Interpersonal Communications Session 1**

Leadership and management training that includes the following:

- Active listening: Discern importance of active listening and discuss ways to improve listening skills
- Inter-generation communication: Discuss generational stereotypes and how to overcome them
- Manage a variety of personalities: Examine various types and discuss how to effectively manage them
- Address bias in a positive way: Discuss what bias is, how it impacts the workplace, and how to overcome it
- Communication management planning: Describe a process to provide accurate information to the right people at the right time
- Conflict resolution: Discuss and role-play difficult conversations and mediation sessions

## **Leadership Training: Interpersonal Communications Session 2**

Leadership and management training that includes the following:

- Performance Management: Engage with employees while avoiding micro-management
- Discuss “The Engagement Matrix”, a Leadership Techniques registered tool to help ‘processize’ employee engagement
- Effective time management strategies to reduce stress
- Discuss common complaints from corporate leaders regarding not having enough time and ways to overcome poor time management
- Lead without authority (mentorship); be a servant leader
- Commitment and accountability; commit to organizational goals and objectives and be accountable to all stakeholders
- Balancing workloads and priorities (delegate); learn to effectively delegate clearly and unambiguously
- Respect work/life balance
- Take corrective action Change Management
- Be a change champion (recognize and support change)
- Explain ‘What’s in it for me? (and...what’s not)’
- Lead change management initiatives (conflict resolution)
- Gain support and overcome resistance

## **Management: Principles and Responsibilities**

This class will teach basic management concepts for new supervisors. Essential skills including communication, delegation and interviewing will be covered. The session will also include discussions on risk and stress management. Attendees will learn the basic responsibilities of a supervisory position and effective techniques for interviewing, team building and effectively communicating to all stakeholders.

## **Mastering Politics and Emotions in the Workplace**

Having access to an unprecedented velocity of communications has its pros and cons. The pro side of the equation has some fairly significant things going for it. Our ability to respond to disasters and emergencies around the world has saved millions of lives. Transparency and effective communication have changed the world in countless ways on every continent. For the modern manager, harnessing that vast potential and directing it in a positive and productive way is one of our most enduring challenges.

Many unsuccessful projects fail to meet associated objectives due to poor stakeholder engagement. Simply put, our projects are failing because we are not communicating effectively! We need to be able to communicate the right information at the right time to the right people. And that requires planning. An overabundance of communication gets lost in a quagmire of data and too little information stimulates rumors and can lead to incorrect conclusions.



Knowing what to say and to whom to communicate still isn't quite enough! We need to pay attention to how we say it. The impact of our communications can be enhanced by the way we say it. And the opposite is true as well. Our communications can be rendered completely ineffective if we do not account for the perspective of the receiver and the environment in which we are operating. A basic understanding of our emotions and the ways in which those emotions affect communications will help you become the best communicator you can be and lead your teams to new levels of success and collaboration!

### **Mentoring, Delegating, and Coaching**

Studies show that employee engagement is key to productivity and employee retention and that happy people are more productive than unhappy people. This workshop will facilitate an in-depth understanding of the differences between mentoring, delegating and coaching as well as the reasons for each and the appropriate circumstances for application of the principles. After attending this class, attendees will:

- Learn When, Why and How to Mentor, Delegate, and Coach employees.
- Learn Performance management through employee engagement with The Engagement Matrix®.
- Learn the relationship between happiness and productivity.

### **Microsoft Project: Using Microsoft Project to Ensure Project Success**

Microsoft Project is one of the most widely used scheduling tools available. The feature-rich capabilities and easy-to-use interface make it immediately effective for virtually any project. And therein lies the most commonly discussed complaint about it – the learning curve can be long and at times, steep.

In this hands-on workshop, we will work through a project from initiation through closure, demonstrating how to plan, implement, track and accurately report your project status in terms of both schedule and resources using this extremely powerful tool. (Be sure to bring your laptop loaded with MS Project to the class).

Learn to effectively baseline your project to provide predictable and reliable project reporting. Play what-if games to determine your optimal resource allocation. Manage multiple projects using shared resources and respond to changes quickly. You can even plan and manage Agile projects.

You need to come up to speed quickly and we will help you do just that! By the end of the day you'll be ready to manage your resources and schedule efficiently and effectively saving you time, reducing your stress, and driving your team to even greater success!

### **Microsoft Project: Advanced Techniques**

This training will include a brief overview of setting up a project and scheduling in MS project, work on calendars, milestones, baseline schedules and resource loaded schedules. Cost loaded schedules will also be covered, as well as formatting of budget vs. actual cost. At the completion of the session, attendees will be able to: set up a project and schedule in MS Project; learn how to work with calendars, allow for holidays, schedule durations, etc.; set up milestones and show floats in tasks; set up baseline schedules and enter actual durations; and schedule with resource loading.

### **Negotiation Skills and Engagement Practices**

This course will provide attendees with the tools and techniques needed to effectively negotiate contracts, resources and other issues when needed and effectively communicate with stakeholders to magnify and enhance their probability of success. Attendees will come away with up-to-date methodologies that will enable them to navigate office politics through the use of creative communication strategies and an understanding of behaviors extending from various types of personalities.



## **Office Politics, Relationships, and Interpersonal Communication Skills**

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For the modern manager, harnessing that vast potential and directing it in a positive and productive way is one of our most enduring challenges. Many unsuccessful projects fail to meet associated objectives due to poor stakeholder engagement.

Simply put, our projects are failing because we are not communicating effectively! We need to be able to communicate the right information at the right time to the right people. And that requires planning. An overabundance of communication gets lost in a quagmire of data and too little information stimulates rumors and can lead to incorrect conclusions. In this session we will explore and discuss industry proven communication methodologies to bridge the communications gaps and get things done effectively and efficiently!

## **Organizational Process and Work-Flow Analysis**

Workflow analysis is an often-overlooked area that can be instrumental in determining the outcome of your project. Organizational processes and workflows often have a direct impact on the environmental factors that influence the level of success of project work. Analyzing and understanding the workflow can lead to improved resource optimization and reduce redundancy within the organization which in turn leads to improved efficiency and productivity. In this workshop we will examine organizational process and workflow through the eyes of the project manager to determine how we can best utilize organizational strengths to improve project performance.

## **Practical Project Management**

This course is designed to assist project managers and project team members to quickly develop the practical knowledge and skills needed to plan a project and improve their projects' outcomes. Topics include:

- Defining the project
- Constructing a project plan
- Developing the project schedule
- Developing estimates and budgets
- Monitoring and controlling the project

On completion of this course, participants will be able to:

- Explain the key components of a project
- Describe the essential elements of a project plan
- Utilize a work breakdown structure to plan a project
- Develop a project schedule showing durations and dependencies
- Describe techniques for developing cost estimates, pricing proposals, and project budgets
- Explain techniques for monitoring project progress
- Describe effective approaches for managing deviations from planned outcomes

## **Preparing and Managing Budgets and Schedules**

Learn the principles of project scheduling using Microsoft Project. Students will examine the critical path method, task and milestone structure, resource utilization and Gantt chart analysis. Learn to create, modify and report on project schedules and to use the schedule to drive the project to successful completion.



## **Professional Management Behavior Training**

Acting with professionalism and being a role model requires skill, introspection, and most importantly, the will and drive for continuous improvement. The needs for mutual respect, effective communications, and nurturing interpersonal relationships are tantamount in today's business environment. Numerous studies have shown a positive correlation between effective organizational communications and improved business results. The reality is that the more engaged our teams and stakeholders are, the better our results will be.

In this workshop we will explore the characteristics of a high-performing team and discuss the proven methods and techniques that can be employed immediately to set your team on a course of continuous improvement, higher engagement, happier employees, and skyrocketing results!

## **Project Development Life Cycles**

Project development life cycles can be as varied as the organizations that implement them. The three high-level categories: Predictive, Iterative, and Adaptive, are all customized into hybrid combinations to fit the environment in which they are used. In this workshop we will examine the various life cycles and discuss matching the appropriate life cycle to the type of project being managed. We will also offer an abbreviated process that can be readily implemented in virtually any environment to help project managers hit the ground running.

## **Project Management 101: What It Is and How It Works**

The business world is rapidly evolving into a Project Economy. The rate of technology change and dynamic conditions of marketplace competition demand results that simply cannot be attained by individuals. Teamwork and cross-organizational collaboration are required for success. Job descriptions are changing from lists of skills to behavioral adaptability, personal resilience and creative ability.

Project Management skills and abilities are fundamental requisites for success in today's business world! Join Lisa and Dave for an engaging and up-to-date overview of Project Management. In this one-day workshop you will learn current techniques and effective methods for keeping your projects on track!

## **Project Management 201: Master Class**

The world of Project Management is rapidly evolving from an us-and-them perspective (Agile vs. Waterfall) to a hybrid environment in which we are encouraged to draw techniques from the best of all worlds in order to meet the needs of our project in our environment. Rather than having to decide if we should learn how to manage Agile or how to manage Waterfall, we are learning to understand as many techniques as possible and to apply the right combination to our specific situation. In this two-day workshop, Lisa and Dave will engage you in a journey from project concept through execution to the transition to your next project. Along the way, you'll learn the most current best practices through hands-on activities and exercises.

## **Project Management Essentials**

Learn the principles of project scheduling using Microsoft Project. Students will examine the critical path method, task and milestone structure, resource utilization and Gantt chart analysis. Learn to create, modify and report on project schedules and to use the schedule to drive the project to successful completion.

## **Project Management Essentials (basic tools and techniques) (all technical)**

This workshop will examine the basic toolbox of the successful project manager. There are a variety of excellent tools available to facilitate the work of the project manager. It is important to understand the underlying common principles so that the right tool can be effectively applied to the right problem. While investment in tools may be necessary, there are also many techniques that make effective use of common technology that exists in most workplaces, such as spreadsheets and email apps without additional investment.



## **The Project Management Evolution: Project Management 2021**

Welcome to the ever-changing world of Project Management! Our world. We invite you to join us for an overview of the latest and greatest in Project Management, from Agile to Waterfall, and from Situational to Servant Leadership.

You will get insights into the changes within the industry, including an introduction to the new PMP® certification, the new Disciplined Agile certifications, and additional exciting new trends.

The Project Economy is here! Whether you are on the project management career track yourself, or working in an industry where there are projects, you will benefit from this day!

### **Project Management: Introduction to Project Management**

This is an introductory overview of the Project Management profession. The intended audience has an interest in becoming a project manager or becoming more effective when executing project work, with little to no project management experience. We will cover topics, to include: the unique and exciting world of project management; the art and science; and the value to you and your organization.

### **Project Management: Learning to Drive**

This class will examine one of the most common complaints expressed by project management practitioners - the need to manage in the absence of authority. We will discuss practical skills that enable control and influence as a substitute for hierarchical power. The associated soft skills, including negotiation and communication, will be examined within this context. Project managers need the ability to lead and motivate team members and stakeholders by creating within them a personal desire to accomplish the tasks and attain the results dictated by the project requirements. This class will demonstrate techniques using both soft and hard skills that can be immediately applied to improve the probability of success within a collaborative matrix organizational structure.

### **Project Management Overview**

This class will cover an overview of the *PMBOK® Guide 5th edition*, as well as leadership tips and a review of project fundamentals. The day will be punctuated periodically with challenging interactive sessions in which participants practice the principles that will be used to guide them through various situations. We will discuss current topics that impact the workplace in profound ways and how to affect change in a positive way. This class will provide students with an understanding of managing a project in accordance with the *PMBOK® Guide*, as well as tools for addressing common challenges and issues facing group leaders, managers, and supervisors.

### **Project Management: Planning and Scheduling**

Successful project management requires an ability to manage many areas and priorities simultaneously. Utilizing effective tools for monitoring and analyzing project performance enable fast and accurate measurements against baseline to provide guidance in managing priorities.

This workshop takes a semi-deep dive into the specific techniques of Earned Value analysis and the Critical Path method. The presented material is supported by hands-on activities and a capstone project that organizes the tools into a scale-able and repeatable project management process.

### **PMP Exam Prep 2021 Abstract**

Are you ready for the Project Economy? Do you have the skills you need to turn ideas into reality? Are you able to successfully lead teams under pressure to produce business value? Can you do this and relax enough to sleep at night? The Project Management Professional (PMP)® Certification is recognized throughout the world as validation of your preparedness to lead in this highly competitive and dynamically evolving environment!



The new exam content is half agile and yes, you are still going to need the basics. Traditional project management works when properly applied. An agile mindset can and should be applied to any project environment regardless of the development lifecycle!

The authorized exam preparation content is produced by the Project Management Institute (PMI) and is available through a variety of methods and vendors. The core material is the same from vendor to vendor and is independent of the delivery method. That is why it is imperative that you choose wisely when plotting your course to certification.

We believe there is strong value and a clear return on your investment when you choose a high-quality instructor-led program, especially if you have a busy schedule. A complicated work-life balance can make exam preparation extremely difficult! Having access to an experienced coach that can help you along the way, one that will push you when necessary, may be just what you need to climb that next step. We look forward to leading you on that journey!

## **Project Management Reality**

As Project Managers, we are facing an ever-increasing workload and a plethora of problems being thrown at us at light speed! In this seminar we will discuss what you need right now to get your project moving! What are those things that are impeding your success? We will discuss the very real problems that you are facing at work today. Honesty and trust *are* paramount, but how do you engender those qualities in your team members? We all know to coach in private and praise in public, but do we do it? Is your coaching or praising perceived differently by different people? Does age matter? The platitudes and clichés just keep coming at us.

To be a successful Project Manager requires us to call heavily upon our strengths in many areas. Equally important is an understanding of our weaknesses and reaching out for support and reinforcement in those areas. That's the main idea of this workshop! This is a golden opportunity to share ideas and network with people in similar situations, facing similar challenges. We are going to talk about those things that shouldn't be a problem...but are!

## **Project Management Reality (Unsticking Your Project)**

This session will address common problems that do occur but shouldn't. The challenges that plague project managers are often not addressed by the "book" answers. The advice from the industry experts often seems to not quite apply. The real world doesn't often operate in the serial manner prescribed in the books. We have to understand that we are not going to cleanly move through the project phases. We are unlikely to form our team at the beginning of the project, proceed through team development as we move through the execution phases and then a nice clean adjournment of the team as the project comes to a nice neat and successful conclusion. It is far more likely to feel like this is all happening at the same time and that there is an endless list of problems to solve.

## **Project Management Techniques and Best Practices**

What is project management? A job? A profession? A set of skills, tools and techniques? Yes! It is all of these. Many project managers hold that eponymous title while scores of others labor at the execution of tasks without the benefit of the title or any authority. This is one of the things that makes project management exciting! The typical day for project managers typically...doesn't exist! Project management is both a science and an art. The science constitutes those aspects that generally involved some type of hard numbers; budgets, schedules, etc. The science of project management refers to the hard skills. Those things to which there is a definite answer, a right and wrong. The art refers to the interpersonal skills. The so-called "soft" skills, which are actually quite difficult for many of us to master. This workshop will examine both sides of this equation introducing participants to industry best practices that will facilitate efficient and effective execution against tough project requirements.



## Project Scheduling Using Microsoft Project (1 or 2-day class)

Learn the principles of project scheduling using Microsoft Project. Students will examine the critical path method, task and milestone structure, resource utilization and Gantt chart analysis. Learn to create, modify and report on project schedules and to use the schedule to drive the project to successful completion. Students will: be able to identify the critical path and manage variables that affect it; learn to integrate complex constraints in project scheduling; and gain the ability to develop and manage related budget and resource parameters.

## Reliable Predictions: Taking the Guesswork Out of Project Estimation!

Your project plan is only as good as the foundation on which it is based - your time and cost estimates. This is not a guessing game! Join Lisa and Dave in this interactive workshop to hone and perfect your estimating accuracy. Become a reliable predictor of project performance. Be a great Project Manager! Hands-on activities will provide you with the experience you need to wade your way through the murky waters of estimation. The *Practice Standard for Project Estimating* (published by the PMI) will be our guide as we increase our understanding of industry best practices and work through the stages of estimating: prepare to estimate, create estimates, manage estimates and improve the estimating process. Good project management is more than reporting status, it's driving your team to success. Developing a reputation as a reliable project manager who consistently meets schedule and budget constraints will separate you from the crowd and propel your teams to even greater achievements!

## Requirements Management

It is critically important that Project Managers be able to practice what is preached, to not only talk the talk, but be able to proudly walk the walk and lead the way to a more engaged and highly motivated project team that is able to execute against aggressive and dynamic requirements and lead the way to an ever-improving work environment. This course will include the following:

- Project Development Life Cycle Selection
- Work Breakdown Structure
- Activity Sequencing
- Requirements Management Overview
  - Needs Assessment
  - Requirements Management Planning
  - Requirements Elicitation
  - Requirements Monitoring and Controlling
  - Solution Evaluation
  - Closing
- Benefits Realization Management
- Requirements Risk Management
- Agile Requirements Management

During this course, attendees will be able to: understand how to review client documents, including statements of work and other materials to ensure they have the best understand of what is being asked and can develop an optimal solution for the client; become familiar with benefits realization, requirements risk and agile requirements management; and build proficiency in understanding and applying activity sequencing.

## Sensitivity Training

Today's project management professional has pressures from all sides and success requires an environment that is open to input from everyone. Establishing a work environment that is conducive to creativity, innovation and motivation requires a continuous, proactive approach to diversity and inclusion. In this workshop, we will examine and discuss the values, biases, and emotions that can tear a team apart or lead to unparalleled success. It's all up



to you! From this workshop you will: understand the meaning and importance of sensitivity and diversity in the workplace; learn to identify bias and ensure that it does not enter or impact the decision-making process; and be able to discern harassment related behaviors and the proper situational responses

## **Sexual Harassment Prevention Training**

Maya Angelou is famously quoted as saying “I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.” Unacceptable behaviors in the workplace are counter-productive and demoralizing. Certain behaviors are illegal and can result in expensive litigation costs and employment termination.

It is imperative that there be a common understanding of what is and is not acceptable and that all employees be able to recognize unacceptable behavior and respond appropriately by reporting incidents and observations in accordance with company policy.

Workplace Harassment can be based on a variety of factors that differ from one person to another, such as race, sex, and disability. This workshop will give employees the tools necessary to recognize harassment in the workplace and help them understand how their behaviors and attitudes may cause offense to others.

## **Stop Wasting Time in Meetings! Effective Facilitation Techniques**

We all love a good meeting, right? Well... yes! The key is to have a good meeting! And what is a good meeting? A meeting that people want to come to! A meeting that they want to participate in! It starts and ends on time and when they leave, they feel that they have accomplished something.

Meetings are a widely used and generally efficient communication tool with high costs in terms of time, efficiency, productivity, quality and employee engagement. Combining the topics of personal time management and meetings in this interactive workshop we will discuss various techniques to enable attendees to manage their own time, run great meetings, minimize interruptions and help others to succeed through effective time management and meeting facilitation.

## **The Servant Leader: The True Essence of Leadership**

This workshop is based on the book ‘The Servant: A Simple Story About the True Essence of Leadership’ by James C. Hunter. The concepts of Servant Leadership are as ancient as written history and have been proactively integrated into Project Management for several decades. It is therefore incumbent on us to understand what is meant by this seemingly self-contradictory term. How do you serve as a leader without having people take advantage of you? How do you get results through service to others? Join Lisa and Dave for an engaging day of discovery in the world of Servant Leadership. Participants will have the opportunity to:

- Understand the values and advantages associated with Servant Leadership
- Review principles from the book ‘The Servant’ by James C. Hunter
- Apply lessons learned through interactive activities

## **The Strategic Project Manager**

Congratulations! You are a project manager! Whether this is your first project, or you are seasoned with a successful history of getting things done, you’ve realized that your ability to maneuver around the obstacles and over the hurdles is highly dependent on the relationship between your project goals and the value of your results to the business. It is critically important to understand the business impact of your decisions.

A project manager who is able to quickly and effectively comprehend and communicate the business value of his/her project elevates themselves in the eyes of executive management because they are able to quickly provide





the information needed for decision making at the executive level. A business-savvy project manager is focused on results in a holistic way. They will strive to produce results that satisfy stakeholder expectations and return positive business value while maintaining a motivational environment that yields creative and innovative solutions.

In this workshop, we will examine: areas of interest to the business-value oriented project manager; managing time in a way that enables sustainable output levels; engaging all stakeholders so that project goals and business expectations remain aligned throughout the development lifecycle; and the impact of collaborative communications and the importance of harmonizing a diverse workforce.

These topics seem secondary to many and yet remain the very keys to your success. The return of business value through the investment in your project is the focus of your management. This workshop will help you to understand the business perspective, harmonize your project goals with stakeholder expectations, and lead your teams to greater and greater success!

### **Technical Management in a Dynamic Environment**

The role of the project manager can be tenuous and stressful, especially in an environment where project requirements are vague, and the end results are a combination of measurable tangible goals and intangible results. However, when the entire team, including project management, see the role as a facilitator rather than a task master, the role is clarified, and the value-add proposition is crystal clear.

Results are contractually mandated and measurable progress toward those results are expected at every level within the organization. The project manager in this environment has multiple responsibilities: to facilitate the forward progress of the team, provide required data, and report on progress as expected.

Project managers need to be able to get the right information to the right people at the right time, anticipate challenges and do everything possible to resolve them before they become obstacles. In this workshop, we will examine a more flexible approach to project management that enables a servant leadership inspired approach to team motivation, while driving toward solid results. Employing a tailored process and non-rigid methodologies to project management employee engagement is improved, stress reduced and continuously improving results achieved.

### **Transition to Supervisor**

The transition from individual contributor and team member to supervisor or team leader is at once an exciting and stressful time for the new manager. Many of us are promoted to leadership positions based on our specific skills and expertise. The need to get up to speed quickly is paramount and must often be accomplished while transitioning from the individual role.

In other words, the new manager needs to continue doing her old job, learn to do the new job (manage the team) while actually managing the team. This paradigm tends to work a lot better when the team is supportive of their newly appointed colleague. Often chosen from amongst their ranks, this is not always the case and the new manager has the added difficulty of leading a resistant team.

This workshop addresses these issues from the perspective of the new manager role. Attendees will practice positive approaches to coaching and delegating employing proven techniques to dramatically improve their chances of success in their exciting new role!

### **Unstick Your Projects: Leadership Principles & Project Management**

During this course, we will discuss project management and leadership techniques that will prepare individuals to prepare, track, and report the metrics needed to make sound business decisions. You will learn how to prepare



meaningful schedules and be equipped with the tools and skills to provide accurate and timely budget and resource information.

Only by knowing the real-time status of your project can you make fast and effective resource allocation decisions! We will show you how to facilitate efficient and effective meetings and to create an environment that encourages motivation and open communication. Topics for the day include:

- Organization: The PMI, time management, prioritization and management of project constraints
- Schedule: Critical path method, resources and constraints, and contingency
- Budget: Estimating and budget preparation, tracking and reporting, and earned value analysis
- Leadership: Motivation, leading by example, leadership vs. management, conflict resolution
- Communication (Client-Focused): working with clients, negotiation skills
- Communication (Project-Focused): team environment, meetings, brainstorming, staying on track



# Topical Live Presentations & Webinars (typically 60-90 minutes)

## Accountability: What It Is and How It Works

What is accountability? Why is it important? What happens if accountability is not a part of the organizational culture? These questions are critically important to project managers - especially those who are in the position of managing without the benefit of authority. Join Lisa and Dave to explore the world of accountability and learn to instill an attitude of accountability in your team to improve results and prevent your projects from getting stuck in the world of blame and finger-pointing.

## Agile Earned Value

Agile has come of age as witnessed by its acceptance in mainstream project management as well as the highly regulated field of federal contracting. Sitting right at the intersection of these three, often disparate, entities (Agile Practitioners, Traditional Project Management and the Federal Government) are the tools and methods associated with Earned Value Management. Emerging in the 1960s as a financial management tool, Earned Value has matured into the de facto standard of measurement for project managers throughout industry for approximately the past 50 years. As we advance into the era of development lifecycle integration and the use of hybrid project management techniques, we have the advantage of a proven technique that can be used with the most current methods of project management. We invite you to join us for a brief exploration of the use of earned value measurement techniques, work together on a practical exercise, and share ideas about how these methods may be used in your environment to help keep your projects on track!

## Agile: Way Out of the Box

Peter Drucker wrote about "The futures that have already happened". He was referring to trends in corporate economics and explained that he was not predicting the future but rather reporting results as observed within the trends. Well it's happened again; the future is here! Agile is out of the box and is no longer an arcane idea restricted to a radical cohort of software developers who claim to finally have the answer to on-time and on-budget project performance. The wide acceptance of Agile methodologies is evidenced by the Project Management Institute (PMI) offering an Agile-based certification and the inclusion of Agile methodologies as a valid alternative on Federal contracts.

The major principle in Agile is to be able to deal proactively with continuously evolving inputs and goals. As requirements are amended, added, and updated, so must the project baseline be amended and updated. This presentation is about agility within the entire project management process and is independent of the selected project development lifecycle. Is there an area of project management where we should *not* be agile? Can Agile principles be applied in your environment? Let's discuss!

## Budget Management, PERT Method: Avoid disaster, become an estimating master!

Are your projects ever late or over budget? Do you have difficulty with the "known-unknowns" gumming up the works? Do you request "buffer" in your schedules and budgets only to have them "optimized out" by second-guessers? The PERT technique has been used for over fifty years to manage project risk and bring the associated projects to a successful conclusion with respect to the project constraints. In this presentation we will show you how to simplify your estimating process and calculate contingency that you can defend!

## Building and Maintaining a High-Performance Team

Performance management. Do you dread the thought of it? Why can't everyone do exactly what is required when it's needed? And then there's the same old complaints about managing without authority! Leadership and management training are included in every level of education through high school and college. This means that young professionals are entering the workforce with exposure to enlightened leadership concepts. This is setting



an unprecedented level of expectation for performance feedback which we are obliged to meet. In this session we will map out some milestones that illuminate the road of high-performance.

## **Business Analysis: Aligning Project Management Objectives with Organizational Goals**

Success in project management requires the ability to make tactical decisions quickly, and while the traditional role of the project manager has been to drive the project toward success with respect to schedule, budget and quality, more recently our obligation has expanded to include stakeholder satisfaction and alignment with strategic objectives. This focus on taking project management from a wholly tactical paradigm into a more strategic role can be facilitated by the use of business analytics. Executives and Project Managers need to be able to quickly assess multiple projects across the organization in order to evaluate and balance resources and workloads with project requirements and deadlines. Additionally, integrating project metrics and reporting into the organization's strategy and information management systems will help to ensure that projects are aligned with high-level organizational objectives as well as providing metrics such as Key Performance Indicator's (KPI's).

Join us for an interactive and entertaining discussion on the use of Business Analytics to help improve project execution results and provide insight into the interactions of multiple projects. The impact of one project on another is a well-known trap for many Project Managers. This workshop will provide hands-on practice with some very effective business performance management tools such as the balanced scorecard, KPI's, and dashboards to translate data from multiple organizational sources into valuable information that can be used to make better decisions at both the tactical and strategic levels.

## **Business Ethics**

An organization's ethics will determine its reputation. Ethics is very important, as news can now spread faster and farther than ever before. Good business ethics are essential for the long-term success of an organization. Implementing an ethical program will foster a successful company culture and increase morale and productivity. In fact, it can change lives.

Ethics will have an influence on all levels of operations. It will influence all who interact with the organization including customers, employees, suppliers, etc. All these groups can have an effect on the way a company's ethics develop. In this workshop we will discuss issues surrounding business ethics with an emphasis on the positive impact of understanding policies and the reasons for them.

Topics will include:

- What is business ethics
- The management of ethics
- Policies and rights
- Business and social responsibilities
- Ethics in decision making
- Whistle blowing
- Managerial ethics
- Addressing unethical behavior
- Happiness in the workplace

## **Business Ethics: Should I Be Working Here?**

Are there moral absolutes? Is business ethics different than ethics? Should it be? Today's business leaders must have a firm grasp on the answers to these questions, not only because of increased legislative scrutiny, but because Business Ethics have become a strategic imperative! Is your workplace a great place to work? Does the ethos of the organization align with your portfolio of principles and values? If not, what are your options? Can you change the workplace culture? Join Lisa and Dave for a brief exploration of corporate social responsibility and how we can create workplaces that allow greatness to exist and thrive!



## **Collaborative Communications Strategies**

Improve the ability of the staff to work well with others through better communication. Gaining an increased understanding of each other and our collective needs enables the implementation of strategies for producing common ground that leads to progress. Attendees will come away with up-to-date methodologies that will enable them to navigate office politics using creative communication strategies and an understanding of behaviors extending from various types of personalities.

## **Confront Conflicts with Confidence**

When there is more than one person in the conversation (and we hope there is), there is likely to be a difference of opinions. Conflict. In fact, we hope that there will be disagreement! Alternative perspectives and opinions lead to innovation and creativity! The key is to confront the conflict, and not the person. Confront without being confrontational. Disagree agreeably. Let's talk about a few ways to do this and – why it's so difficult!

## **Constructive Criticism and Difficult Conversations**

Project managers, team leaders, and managers are often stymied and stalled by an almost imperceptible slowing of progress. Even when detected it is sometimes difficult to determine the root cause of the problem, and of course, it is right there in front of us! There is a conversation that needs to take place...and it isn't. The atmosphere becomes heavy, there's an elephant in the room. Participants in this workshop will have the opportunity to practice working through difficult conversations armed with an understanding of emotional intelligence and conversational skills. Mastering the art of difficult conversations will help propel you and your team to greater and more reliable success!

## **Difficult Conversations at Work**

Conflict avoidance can lead to a decline in overall team performance; therefore, it is critically important to be able to effectively address issues as they arise. Join us for a brief exploration of acceptable and effective ways to embrace the challenge of having difficult conversations. You'll get a chance to practice as we break into groups to really challenge each other in various behavioral situations. Practice confronting without confrontation and disagreeing without being disagreeable.

## **Diversity in the Marketplace: *The ABC's of the XYZ's***

Welcome to the multi-generational environment of 2016! Now that we're all here, it's time to get to work on understanding each other. We are experiencing a historically unique era of generational diversity and this unprecedented integration provides a rich tapestry of backgrounds, style trends and purchasing preferences. Compounded by the rapid pace of technological advancement, the impact on business is enormous.

Who has the money? How can we attract a multi-generational buyer-base? How can we simultaneously appeal to baby-boomers, gen-xers, and millennials? What new demands will gen z place on us? The era of instant gratification and immediate communication means that customer service needs to be the number one priority for every business because in this new era a dissatisfied customer has the capability to broadcast instantaneously, before you've even had a chance to recognize the problem! We will discuss the impact that this culture of generational diversity is having on our business environment and the techniques needed for business survival.

## **Diversity in the Workplace**

As managers, we are working at a crossroads of cultural and generational diversity. Our unique national location provides a rich tapestry of backgrounds while our workforce spans five generations! Opportunities afforded by this specific situation can often be overlooked as a result not of negativity, but of a lack of positivity. The advantages available to us can be offset by a passive acceptance of our differences. Join Lisa and Dave as we discuss the benefits that a culture of diversity can bring to your organization and ask if we, as managers, are being proactive enough in our pursuit of high-performance teams.



## **Diversity and Conflict in the Workplace**

Great news! The business environment is more diverse than ever! Multi-generational, multi-cultural, multi-technological workplaces are well-positioned to leapfrog their competition through the strength of ideas and innovation that come with a culture of diversity and inclusion. We invite you to join an interactive discussion about reducing conflict and reaping the advantages associated with an inclusive and inviting workplace.

## **Dynamic Risk Management**

Risk management is one of the most critical areas of project management and yet it is often overlooked or undervalued – until it's too late! This discussion will focus on the necessity for an ongoing risk management process. Creation of a risk register is the beginning of the process, but what happens to the risk register once it exists? Who sees it? Who can add to it? How do we know when an item can be safely removed or deprioritized? When new risk items are exposed, how are they prioritized within the project management plan? Join Lisa and Dave for a lively and interactive discussion about the importance and implementation of a continuous risk evaluation process.

## **Effective Presentations: Mastering Project Presentations**

Presenting material and information to groups is a necessary, yet often overlooked skill for project managers. We are frequently called upon to make presentations. It may be for a simple project meeting, a status review with internal management, or a formal client meeting. Presenting correct and truthful information may get you by, but if you want to truly stand out, an effective presentation can be the key to making a lasting impression. Not only can it help your career, but it's even more important that you represent your team in a way that shines the most favorable light on them! In this brief session, we will discuss the basic principles of preparing and delivering an effective presentation. You will see how slides can make or break the presentation, and perhaps even learn a little about yourself and the great presenter inside of you trying to break out!

## **Effective Time Management**

Where did the day go? Why is the answer so elusive? How can we take control of our time? It may be time to admit that everything will not get done. There is more information available than any of us can process! The frustration is evident all around. And yet we need to drive results. Join Lisa and Dave to discover effective and actionable time management techniques that you can apply immediately.

## **Emotional Intelligence: Managers Have Feelings Too**

Emotional Intelligence is considered to be a fundamental differentiator in today's business environment. A basic understanding of our emotions and the ways in which those emotions affect communications will help you become the best communicator you can be and lead your teams to new levels of success and collaboration! Join Lisa and Dave for a brief overview of the Goleman Emotional Intelligence Model and discover how you can put the concepts to work for you! Upon completion of this session, attendees will be able to: describe the Goleman Emotional Intelligence model; identify the pillars of Emotional Intelligence; apply the principles associated with Emotional Intelligence in the workplace.

## **Engage for Project Success: Virtual Engagement in the Real World!**

The dynamics of our project environments require resilience, adaptability, and creativity. The soft skills we employ in order to nurture relationships and engage our stakeholders have become more than keys to success – they are now critical to survival. The Project Economy is here and it requires a high-level of engagement from all stakeholders. As President Lincoln (and Peter Drucker) said: "The best way to predict the future is to create it". A proactive approach to stakeholder engagement has become an essential practice whether you are employing agile, predictive or in-between.



The Engagement Matrix is a tool that will help you proactively manage stakeholder engagement. In this presentation, we will demonstrate categorization of stakeholders and apply the results to various stakeholder roles. We will show you the four major areas: Manage, Train, Motivate, and Nurture, and you will receive access to the entire matrix which is broken down into 16 mini-quadrants of advice and direction and then 64 micro-quadrants of specific actions. The Engagement Matrix is not for sale – it will be yours to use. Stakeholder engagement, from the team to the sponsors, isn't a passive activity and The Engagement Matrix provides guidance for continuous action. The cycle of stakeholder identification, analysis, and activity is an on-going process that begins before the project and continues indefinitely. The Engagement Matrix will encourage collaboration to become an integral part of your project life, boosting your results, improving the lives of those around you, and enabling your teams to enjoy greater and greater success!

### **The Engagement Matrix: The PM's Guide to Effective Performance Management**

The Engagement Matrix is a tool that provides a guide for the manager who has responsibility for getting work done by employees over whom he or she may or may not have authority. Using this tool, we can quickly assess an individual's performance and determine the appropriate actions to ensure that we treat our best people as they deserve to be treated and appropriately coach everyone for continuously improving performance.

### **Everything is a Project! Home Project Life Cycle: Idea, Disaster, Delegation**

While we think of projects at work, our lives are full of projects involving family and friends. Often, we are faced with a major project, and don't know where to begin. This workshop will demonstrate how the home project, like projects at work, is much more successful using effective approaches, tools and technologies. We will provide you with effective approached and methods to establish collaborations for starting a project and bringing it to fruition.

### **Generations: Coexist**

We hear it all the time! Five generations coexisting in the workplace. Supervisors and managers struggling to lead employees older than themselves. Age, as with any other personal trait, should have zero impact on workplace decisions. *Must* have zero impact. Experience and knowledge contribute to the value we bring to our employers and clients and our age is irrelevant. When we are evaluated based solely on performance and merit, discriminating factors such as age are not part of the equation. Do older workers have different needs and wants than younger workers? Maybe – and that's why we get to know our employees on an individual basis. What motivates each person? What does each member of your team value? Combining individual empathy with the concept of servant leadership will ultimately lead to a more holistically healthy, happy...and productive team.

### **Getting Things Done: Time Management in the Current Environment**

Is time management a myth or reality? Can we really manage time? Can we get everything done? Well, we definitely don't have the time at the moment to dig into the abstract philosophy of time. We have to deal with the existential reality of the expectations that we place upon ourselves and those around us! We really do have to Get Things Done! Join Lisa and Dave for a brief discussion of a few techniques to help you get the important things done and still find time for yourself!

### **How 3D Printing Enables Agility in Multi-Functional Projects**

3D printing, generically known as Additive Manufacturing, is not only disruptive to the prototyping and manufacturing industries, it is disruptive to the design process itself! The integration of mechanical packaging, electronic componentry, and software development into a cohesive project requires a continuous rebalancing of priorities as challenges arising in one area impose constraints on other areas.

Project managers everywhere are being asked to produce better, faster, and cheaper results! An Agile approach may or may not be the right answer. Meanwhile, mechanical design has historically been treated as a serial process often involving extended and expensive lead times associated with tooling.



Additive Manufacturing enables an Agile approach to multi-functional projects. Join Lisa and Dave for a brief journey through the history of Additive Manufacturing (also known as 3D printing) and an exploration of how multi-functional project managers may use available and affordable rapid-prototyping processes to reduce risk and increase likelihood of overall project success.

### **Inclusivity: Continuing the Conversation**

Why continue the conversation? Because it is our job and context counts! Our teams are working within the context of a nation that is crying out for social justice and racial equality. At the same time, conflict management has moved to the forefront of attention for managers. As leaders in the workplace, we must proactively seek opportunities to resolve discontent. If it exists, it isn't hard to spot! So why is workplace conflict so prevalent? Why do managers spend so much time acting as referees rather than coaches? Join Lisa and Dave as they take a look at ourselves and our teams and ask the question - are we being as inclusive as we possibly can be?

### **Keeping Your Project on Track (Monitor and Control)**

Successful project management requires continuous observation of performance and communications as well as effective measurement of progress against established milestones. This presentation is focused on a pro-active approach to managing the various parameters that impact performance.

### **The Keys to Effective Performance Management**

Performance management. Do you dread the thought of it? Why can't everyone do exactly what is required when it's needed? And then there's the same old complaints about managing without authority! The American workforce is rapidly changing and many of the transitions that we think are coming are already here. The contemporary workforce does not appreciate an annual review, they expect feedback every day. Immediate communication has become the norm! Project management training is included in many colleges and universities and there are even high school programs! This means that young professionals are entering the workforce with exposure to leadership and project management concepts. This is setting an unprecedented level of expectation for performance feedback which we are obliged to meet.

This session we will explore ways to optimize your team's performance. Whether you are responsible for performance evaluations or simply accountable for performance, we're going to discuss tips and techniques to maximize output, minimize confusion, and improve the relationships between you and your team!

### **Leadership With or Without Authority**

Congratulations! Your hard work, training, education and most importantly, your past successes have finally culminated in fulfilling your lifelong dream of achieving one of the most coveted positions: Manager! (or team leader, supervisor, etc.). The title is less important than the fundamental requirement: Does your performance depend upon other people performing well?

You want to help DRIVE success! You want to be a part of a team that not only achieves success, you want your team to be happy. They will stay with and help to grow the organization. They will learn from your mistakes and successes and expand that experience into more continuing improvement throughout the organization. The positive impact you make will reach far beyond the walls of your meeting rooms. Join Lisa and Dave for a lively discussion about why authority is overrated and discover easy-to-implement, proven project planning strategies that you can implement immediately to evaluate your efficiency, improve your execution results, reduce your stress and be ready to get up each morning eager to challenge the day!





## **Leading Without a Title**

You're a Project Manager, and your hard work, training, education and most importantly, your past successes have finally culminated in fulfilling your lifelong dream of achieving one of the most coveted positions: Project Manager. You're fortunate to work in that magnificently magical organizational structure known as the "matrix management environment". You're beginning to wonder how anything ever gets done! Yet it does, projects are successful, people get promoted, things GET DONE! And you want to be a part of that success. Not only be a part of it, you want to DRIVE that success! You want to be a part of a team that not only achieves success in terms of the triple constraint, or even the six constraints; you want your team to be happy. They will stay with and help to grow the organization. They will learn from your mistakes and successes and expand that experience into more continuing improvement. The positive impact you make will reach far beyond the walls of your project meeting rooms.

Students will: have a lively discussion about why authority is overrated and discover easy-to-implement, proven project planning strategies that you can implement immediately to evaluate your efficiency; and improve your execution results, reduce your stress and be ready to get up each morning eager to challenge the day.

## **Managers Have Feelings Too!**

Studies have shown a correlation between leadership ability, job performance, and the ability to accurately perceive and manage emotions. While no causal relationship has been proven, it is clear that success in project management is highly dependent on our ability to form and maintain positive relationships.

Join Lisa and Dave for a brief exploration of the connection between emotional intelligence and success in project management. When we love our work, it shows! It spreads! It is infectious! And when our team loves work, they stay! What's love got to do with it? Everything!!!

## **Managing Change**

Change is a constant in many of our lives. All around us, technologies, processes, people, ideas, and methods often change, affecting the way we perform daily tasks and live our lives. This workshop will explore tools to implement changes more smoothly and to have those changes better accepted. The discussions will also provide participants with an understanding of how change is implemented and the importance of managing their reactions to change in order to create a more positive work experience and foster a more effective workforce.

## **Mastering Your Presentation Techniques**

Presenting material and information to groups is a necessary, yet often overlooked skill for today's managers. We are frequently called upon to make presentations. It may be for a simple meeting, a status review with management, or a formal client meeting. Presenting correct and truthful information may get you by, but if you want to truly stand out, an effective presentation can be the key to making a lasting impression. Not only can it help your career...it's even more important that you represent your team in a way that shines the most favorable light on them! In this session, we will discuss the basic principles of preparing and delivering an effective presentation. You will see how slides can make or break the presentation, and perhaps even learn a little about yourself and the great presenter inside of you trying to break out!

## **Meetings That Matter**

Meetings are an important, and often misused, communications tool. They are expensive in direct cost and often astronomically costly in the indirect costs of employee morale and lost productivity. In this brief session (really, it's a meeting) we will outline tips and techniques that will help you facilitate engaging and effective meetings that will matter!



## **Mentoring, Delegating, and Coaching for Optimal Performance**

Effective delegation is one of the keys to being able to manage our time. One of the most common excuses for not delegating is that “it’s faster to just do it myself”. When you find yourself saying this it may be time for some coaching. You need to be able to delegate clearly and efficiently, and you also need to be able to mentor your people without micromanaging. In this session we will discuss the keys to effective delegation and give you some tips for optimal and efficient mentoring and coaching.

## **Negotiation Skills for Project Managers**

This session explores the basic tenets of principled negotiation strategies including the concept of expanding the options to create a win-win-win scenario. Attendees will learn to improve their negotiation skills and facilitate the process by finding common ground and defining their own needs and wants and understanding the needs of their counterparts in the negotiation.

## **Never *Just* a Volunteer!**

“I’m just a volunteer”. Too often we hear this excuse when it comes to missed deadlines and unrealized performance expectations. Project managers have a fantastic opportunity to apply their hard-earned people skills and eliminate this language from their team of volunteers! Motivation and performance management are as critical to leading a team of volunteers as in any leadership scenario. We need to engage our volunteers so that they treat the position as if it were a real job.

## **Out of the Office, NOT Out of Touch! Project Team Engagement in the Virtual Era**

Stakeholder engagement and communications are critical factors in project success, and at the heart of it all is the project team. According to the Project Management Institute’s (PMI®) Pulse of the Profession 2020 Study, “It’s the leaders who can mobilize the right team members to help the company move faster and achieve results who will thrive in The Project Economy.”\*

Enthusiastic involvement of the project team has become an increasingly complex issue, as teams have continued to evolve in recent years to a remote work environment and more now than ever most if not all work is being done through virtual teaming.

During this workshop, we’ll discuss project team engagement with a specific focus on the opportunities and challenges associated with working remotely. We’ll cover some basics like appropriate levels of conversation, and we’ll dig into more complex items like how to manage difficult conversations in this new normal.

Getting comfortable with this new paradigm we find ourselves in will take time. Project team leaders and project managers have a tremendous opportunity to help teams stay engaged and focused. This workshop will help bolster your essential skill toolbox. Ready or not, here comes change! Are you ready?!

## **Performance Management through Employee Engagement**

Performance management. Do you dread the thought of it? Why can’t everyone do exactly what is required when it’s needed? And then there’s the same old complaints about managing without authority! In this presentation we will explore ways to optimize your team’s performance. Whether you are responsible for performance evaluations or simply accountable for performance, we’re going to discuss tips and techniques to maximize output, minimize confusion, and improve the relationships between you and your team! The process begins with defining clear objectives, continues by ensuring that everyone agrees that those goals are attainable and worthwhile, and then closing the gap between desired results and actual accomplishments and behaviors. The American workforce is rapidly changing and many of the transitions that we think are coming are already here. The contemporary workforce does not appreciate an annual review, they expect feedback every day. Immediate communication has become the norm!



## **The PMP of Tomorrow: A New Paradigm!**

Are you ready for the Project Economy? Do you have the skills you need to turn ideas into reality? Are you able to successfully lead teams under pressure to produce business value? Can you do this and relax enough to sleep at night? The new exam content includes a significant amount of agile, and yes, we are still going to need the basics. Traditional project management works when properly applied. An agile mindset can and should be applied to any project environment regardless of the development lifecycle!

Join us for this brief presentation where we will review the recent changes and current evolution taking place within the project management industry to help you stay current and differentiate between fact and fashion when it comes to project management techniques.

## **Presenting with Power and Poise**

For many people the thought of delivering a presentation invokes a fear that is nearly unparalleled! Yet, the ability to prepare and deliver effective presentations can make or break your career! Speaking clearly and concisely in front of an audience requires preparation, practice, hard work, and knowledge of the skills required. The good news is that the skills you need to be a great presenter are at your fingertips. In this session we will provide you with the knowledge you need to create presentations that stand out from the crowd!

## **Project Management for Human Resource Professionals**

While there is a growing interest in soft skills amongst project management professionals, there is equally a need within the human resource profession for knowledge of and ability to apply project management theory, concepts, approaches, and principles to achieve success! Here are three reasons for Human Resource professionals to learn Project Management principles:

1. There are many projects being executed in the HR department
2. HR professionals need to understand the skills required to effectively support the project management function of the organization
3. HR professional certifications require PM knowledge

This is an exciting time in the world of Human Resource professionals and a new era in the Project Management profession. Once known as the “accidental profession” the PMP certification is now one of the most sought-after certifications available.

While stakeholder management and employee engagement are hot topics in the project management industry, the need for project management skills has emerged within the human resource profession and your human resource skills are invaluable as we must get our work done through others. This requires emotional intelligence, advanced interpersonal communications skills and an understanding of motivational techniques. In this session we will discuss the intersection and union of these two professions and discuss the project management fundamentals that are critical to the success of any project.

## **Project Management: Not Just for Project Managers!**

Welcome to 2021 and The Project Economy, one in which people and relationships are as important as skills and knowledge. There has been an evolution in Project Management as the industry has morphed from a focus on process and knowledge to a more holistic view of organizational needs and putting people first. At the same time, there has been a shift in industry to more flexible leadership techniques that require leaders to be resilient and adaptive to changing situations. Join Lisa and Dave as they discuss the latest Project Management techniques and how you may be able to apply them within your organization to drive great results!



## Project Management Overview

Project management -- what is it? Is it for you? Is it for your team? Can it help you achieve your SOP goals? Any size project can benefit from effective project management processes and techniques. Join Lisa and Dave as we discuss project management, the Project Management Institute and the Project Management Professional (PMP) certification. We will enthusiastically share our extensive and eclectic experience in this dynamic and expanding profession. Project management is a transferable skill and can be applied in any setting. This relatively unique characteristic means that learning these skills can be powerfully effective in improving your leadership and management effectiveness and opportunities.

## Project Management Trends

Throughout the history of the practice of project management we have been subject to a plethora of techniques and practices that, while fashionable at the time, became obsolete very quickly. For several years many saw Agile as one of those short-term quick-fix ideas that would soon be remembered as nothing more than a buzzword.

By now most of us realize that that hasn't happened! Agile has become one of several trends that are changing the way we accomplish our goals. In this brief presentation, Lisa and Dave will look at some of the current trends that are shaping our industry, and then you can decide...fashion or fundamental?

## Project Managers Have Feelings Too!

In 1995, Daniel Goleman authored a highly acclaimed book entitled *Emotional Intelligence*, and it was revolutionary in its impact on the workplace. The foundational principles – self-awareness, self-regulation, social skills, empathy, and motivation – are widely considered to be at least as important as subject matter expertise. Studies have shown a correlation between leadership ability, job performance, and the ability to accurately perceive and manage emotions. While no causal relationship has been proven, it is clear that success in project management is highly dependent on our ability to form and maintain positive relationships. Join Lisa and Dave for a brief exploration of the connection between emotional intelligence and success in project management. When we love our work, it shows! It spreads! It is infectious! And when our team loves work, they stay! What's love got to do with it? Everything!

## Project Managers: Our Time Has Come!

The Project Economy is here, and it requires a high-level of engagement from all stakeholders. Our focus is changing from process groups and knowledge areas to People, Process, and the Business Environment. The focus on agility, resilience and leadership will continue to emerge as agile has now become more than a lifecycle - when successfully implemented agility is a way of life. Join us for a brief look at some of the changes that are coming. The new PMP exam. The integration of Disciplined Agile and FLOW. The new ATP program - and more! As President Lincoln (and Peter Drucker) said: *"The best way to predict the future is to create it"*.

## Risk Management in a Scrum Environment

There is an increasingly popular notion that an Agile development cycle eliminates the need and effectiveness of traditional project management. As the age-old saying goes...we need to be very careful to not "throw out the baby with the bathwater". While we eliminate the waste in the project development environment, we need to carefully ensure that we are still doing the necessary risk mitigation. The Scrum environment supports a very proactive approach to risk management.

Join Lisa and Dave for a brief and interactive discussion on the ways in which we make sure that risks are being identified and appropriately managed in the fast-moving world of Scrum project development.



## **So, You're an Entrepreneur: Ten Things Every Small Business Owner Needs to Know**

Congratulations! You've opened a business! Hung out your shingle as they say! You've done your due diligence, raised the money, seeded the idea, sweated, worked, and sweated some more, and then the worrying began. But you're there. You've got your business running. What's next? Who knows! That's the thing. None of us really knows what's coming next so we need to prepare for the unknown. That's where Lisa and Dave can help. They are experienced entrepreneurs. "You should not do this" are phrases they heard quite often when they were floating the idea. It's not easy to be an entrepreneur. And during a slow period a few years later, the advice of a friend was to "close the business and get a job". That was several years ago (and we didn't heed that advice). Now we are inviting you to join us for a discussion of the things we need to know to survive this affliction we call entrepreneurialism.

## **So, You're a Supervisor: Ten Things Every Supervisor Needs to Know**

Congratulations! You've been promoted! You're the boss! The big kahuna!! Well, you're at least a front-line leader or project manager. You may have attended some training; you may be naturally a great leader. Chances are, if you are in a leadership role for the first time, you may be surprised by what you are finding. You may feel alone. You are probably feeling a lot of pressure. After all, they promoted you, and they are expecting results. Your team is expecting leadership. And many first time leaders have problems that are compounded by the fact that as a lower level leader, you may be managing lower priority activities, which means that resources are scarce. In many cases, you are a working supervisor. You are the scarce resource. Join Lisa and Dave as they provide some advice based on years of experience on many sides of the managerial equation, and some tips based on their current immersion in the world of project management and leadership. A world that they would love to share with you so that you can use leadership *magic* to allow your teams to reach their full potential!

## **The Servant Leader: The True Essence of Leadership**

The concepts of Servant Leadership are as ancient as written history and have been proactively integrated into modern leadership practices. It is incumbent on us to understand what is meant by this seemingly self-contradictory term. How do you serve as a leader without having people take advantage of you? How do you get results through service to others?

We must adopt this style of leadership in order to "innovate, lead positive change, and create sustainable value" with our teams. This is the style that works and organizations that recognize and adopt this transformational style are most successful, have happier employees, which leads to increased productivity. Join Lisa and Dave for an engaging session of discovery in the world of Servant Leadership.

## **The Strategic Project Manager Presentation**

Congratulations! You are a Project Manager! Whether this is your first project, or you are seasoned with a successful history of getting things done, you know that your ability to maneuver around the obstacles is dependent on the relationship between your project goals and the value of your results to the organization. It is critically important to understand the business impact of your decisions. The project manager who can quickly comprehend and communicate the business value of the project elevates themselves in the eyes of management. They can provide the information needed for decision making at the strategic level.

This discussion will focus on the business perspective of project management and some of the tools used to measure success in this area. By harmonizing your project goals with stakeholder expectations, you will lead your teams to greater and greater success!



## **The Three R's of Stakeholder Management: The Right Information to the Right People at the Right Time**

From initial identification of interested parties and individuals to the management and engagement of your stakeholders throughout your project lifecycle, the ability to get the right information to the right people at the right time can absolutely make or break your project. Project success must be measured in terms of requirements, budgets, schedules...and people! When the project is completed, we need our people to be energized for the next project. We need them to be motivated to stay with the organization! Employee turnover is costly in terms of money and intellectual property. We must recognize our obligations as project managers in this regard. Stakeholder management is critical to the acceptance of your project results while also being a critical component of managing projects to a successful conclusion with respect to clients, sponsors, management, your team and you!

## **Working Together to Maintain a High-Performance Team**

A team is a group of people working together on a common enterprise. A high-performance team is one in which conflict is considered to be a positive attribute. High-performance teams welcome conflict because it leads to more creative and innovative solutions. Join Lisa and Dave for a brief overview of some of the myths associated with conflict and discover ways to help your team reach higher levels of success!

## **Working With People**

We are creatures of emotion. Our emotions guide our thoughts and actions and the key to a harmonious workplace is the regulation of our behaviors in response to the multitude of emotions that create our environment. Join Lisa and Dave for a brief exploration of the different personalities and emotions and how they impact performance in the workplace.

