

# ELECTIVE PROJECT MANAGEMENT COURSES

- Business Process Analysis, Innovation and Design
- Establishing the Project Management Office
- Financial Management for Project and Contract Managers
- Negotiation Skills for Project Managers
- Vendor Selection: A Collaborative Approach
- Writing Statements of Work
- Making Effective Presentations: Fundamentals

## Participants will learn how to:

- Avoid the management “dead zone” lurking in every process redesign project
- Facilitate a paradigm shift within your organisation
- Set realistic “stretch targets” for the transition
- Evaluate the organisation culture’s readiness for change
- Maintain a constancy of purpose despite declining morale and hostile attitudes in some stakeholders
- Assess the effectiveness of current processes
- Reinvent effective processes for the future

## Programme Objectives

To survive in the twenty-first century, organisations must become lean, flexible, innovative, and customer-driven. To do this, most companies need to analyse and redesign core business processes. They must abandon old ideas about how organisations should be managed and rethink how to do things faster, better, cheaper—or whether to do them at all.

Business process analysis and design, also called business process innovation, can tremendously improve an organisation’s productivity, profitability, responsiveness, and customer satisfaction. In pacesetting organisations, fast, efficient processes have become a primary vehicle

to leverage intellectual capital for competitive performance.

Participants will learn practical techniques for designing critical processes in corporations, government agencies, and non-profit organisations at this valuable course. They will get answers to fundamental questions about process innovation: what it is, what benefits it affords, and why it necessitates rethinking an organisation’s use of information technology and management control mechanisms.

Participants will leave the course prepared to begin business process analysis and redesign with realistic expectations and sound strategies that provide a foundation for success.

## Course Outline

### Defining Business Process Innovation

- A working definition
- A model for process invention
- A business process innovation roadmap
- Why organisations are stuck with worn and broken processes
- Six guidelines for success

### Learning by Looking Backward: A Historical View

- The evolution of organisations, the revolution of productivity
- Deciding when to redesign a process
- Leaping the curve of process change
- Making the case for process innovation

### Process Analysis and Redesign as a Business Strategy

- An enterprise model for change
- Analysing your current change strategy
- Process Measurements
- The economic value-added of process innovation
- Establishing and prioritising customer requirements
- Strategic Process Capability

### The Process-Centered Organisation: Leadership and Change Acceleration

- The management “dead zone”
- The change acceleration model
- Process innovation and leadership styles
- Recruiting the process design team

### Analysis and Evaluation of Current Systems and Processes

- Assessing organisational readiness
- Mapping the existing processes
- Measuring hidden and visible process costs
- Process Analysis Tools
- Assumption Busting

### Functional Process Diagnosis

- Symptoms of process disease
- Cause-and-effect analysis
- Improve it, fix it, or obliterate it?
- Picking “low-hanging fruit”

### Designing the Optimal Process

- The return on investment (ROI) of process redesign
- Breaking away from the old process
- Templates for process reinvention
- Process design tools
- Developing the desired process
- Linking the new process to the customer
- Analysing the risk of change and the consequences of doing nothing
- Anticipating barriers and identifying accelerators
- Highlighting communication tactics and the “rule of 50s”

### Overcoming Resistance to Change: The Silver Bullet

- Making the benefits real
- Dealing with fear and anxiety
- Don’t wrestle the crocodiles, drain the swamp
- Common costly mistakes and how to avoid them
- Celebrate success

## Participants will learn how to:

- Identify Project/Programme Management Office (PMO) capability based on an established competency continuum model
- Determine the appropriate PMO structure for your organisation
- Determine what PMO functions are needed based on project management support requirements
- Recognise and overcome barriers related to PMO implementation
- Translate requirements for PMO functionality into distinct roles and responsibilities of PMO staff members
- Create preliminary PMO implementation plan

## Programme Objectives

The Project/Programme Management Office (PMO) is one of the fastest growing concepts in project management today, as it is key to effective implementation of project management across the organisation. Effective PMOs come in varying shapes and sizes, from simple support offices to full centres of excellence. This course will enable participants to anticipate as well as answer the questions associated with the creation of a PMO, from benefits to barriers to alignment with strategic business objectives and to develop the framework for a successful implementation.

In a highly interactive classroom environment, participants will learn a common frame of reference to project management and related PMO concepts and activities. They will review the full complement of potential PMO functions so as to understand which match their organisation's needs.

Participants will consider options and select a PMO structure that can be properly aligned within their organisation. Working with fellow project managers, they will discuss their experiences and concerns in context with industry practices as they develop their own plan.

Most importantly, participants will use structured worksheets to experience the actual development of a preliminary PMO implementation plan. Participants will take back to their organisation a framework for further development with their stakeholders, including the action plans they will need. This course is a must for experienced project managers and senior managers who have recognised the need to obtain the knowledge and approach to plan and implement the appropriate PMO for their organisation.

## Course Outline

### Key Concepts

- The range of project oversight
- The competency continuum
- The purpose of a PMO
- Benefits of establishing a PMO
- Key factors for PMO success
- Identification and involvement of influential stakeholders
- PMO project life cycle framework
- Facilitating stakeholder buy-in for the PMO
- The needs analysis and feasibility worksheet

### PMO Organisation

- PMO structures and their characteristics
- PMO organisation issues and challenges
- The organisational design worksheet

### PMO Functions

- The functions
  - Project management competency
  - Project management services
  - Project operations support
- Matching functions with support requirements
- Issues and problems related to PMO function implementation
- The PMO function worksheet

### PMO Participants

- Authority required for effective performance
- PMO staffing
- Roles and responsibilities
- The PMO participants worksheet

### PMO Planning and Implementation

- Creating the PMO charter
- Assigning the PMO manager
- Integrating applicable organisational policies
- Establishing project manager qualifications
- Developing project classification guidance
- Establishing PMO processes and procedures
- Creating a change management plan
- Identifying and analysing PMO risks and developing risk response strategies
- Estimating PMO start-up costs
- Developing a preliminary PMO implementation plan

**Participants will learn how to:**

- Communicate more effectively with accounting and financial personnel
- Read, understand, and analyse accounting and financial data
- Expand your work in project scheduling and cost control to encompass additional financial metrics and tools
- Minimise project financial risk
- Develop and apply tools for comparing project financial returns

**Programme Objectives**

In today's world of increasing competition and focus on corporate earnings, project managers are held accountable not just for achieving technical and schedule goals, but also for meeting profitability and other financial goals. This course explores the financial metrics that are commonly used and examines the not-so-obvious financial impact of typical operating decisions and actions. Building on competencies developed in the core management curriculum, participants will examine the inner mechanics of how finance and accounting can impact their project.

Participants will learn about common financial analysis tools in the project environment that link project management to broader corporate strategic goals.

Case studies and project-related exercises give participants the opportunity to apply these proven tools and techniques. They will see how finance often drives organisational decisions and evaluations of project performance. Participants will also learn how operating decisions regarding pricing, terms and conditions, and asset management directly and significantly affect the financial health of their organisation.

This three-day course is so packed full of vital topics that many students refer to it as a "mini- MBA experience" and even veteran MBAs have praised it highly. Take advantage of this opportunity to get a firm grasp of the financial management issues that can affect your projects.

**Course Outline****Fundamentals of Finance**

- Financial accounting concepts
- Generally accepted accounting principles
- Reading and understanding financial statements
- Financial analysis
- Managerial accounting
- Cost vs. revenue
- Business case consideration
- Profitability measures
  - ROS
  - ROA/EVA
  - ROE
  - IRR
- Time value of money
- Discounted cash flows
- Direct vs. indirect costs
- Fixed vs. variable vs. semi variable costs
- Break-even analysis

**Contract Profitability— Pricing**

- Pricing strategy and tactics
- Profit planning
- Cost estimating
- Cost-based pricing
- Market-based pricing
- Value-based pricing
- Profit objective
  - Market structure
  - Follow-on business
  - Risk
  - Z score

**Asset Management—Cash Is King**

- Cash
- Timing of cash flows
- Accounts receivable
- Inventory
- Equipment

- Revenue recognition
- Financing arrangements

**Terms and Conditions (Ts and Cs)— Best Practices**

- Value, cost, and risk
- Seller-friendly Ts and Cs
- Unfavourable Ts and Cs
- Metrics to evaluate

**Cost Estimating—What Works Best**

- Cost estimating methods
- Planning and scheduling
- Making sense of historical data
- Experience curves
- Relationship between cost estimating and pricing

## Participants will learn how to:

- Use competitive and collaborative negotiation strategies with success
- Recover a stalled negotiation using breakthrough techniques
- Adjust your negotiating style to match the preferences of the other party
- Deactivate the impact emotions and focus on finding agreement
- Apply negotiation skills for efficient cost and schedule performance
- Plan strategies to effectively develop and manage collaborative relationships critical to your project

## Programme Objectives

Negotiation is an invaluable skill for any project manager. Not only do you negotiate agreements with vendors and contractors, but also you must effectively negotiate with stakeholders, customers, and team members throughout the life of a project. This three-day highly interactive experience covers the dynamics, processes, and techniques of internal and external negotiation situations faced by project managers.

Short on lecture and long on practice, this course provides participants the opportunity to experience one-on-one negotiation. Participants will learn how to analyse their own and the other party's negotiation style, diffuse conflict and turn it into an advantage, and negotiate more effectively.

Participants will also learn how to negotiate for efficient cost and schedule performance and achieve successful results on time. Participants will receive coaching and feedback from the instructor and the other participants.

By the end of the course, participants will have explored the dynamics of both the competitive and collaborative models of negotiation as well as some of the implications of team negotiations. Participants will have not only new skills, but they will have had experience in using them in realistic situations. To ensure they maintain and build these new skills, the course includes use of a Professional Development Plan designed to assist participants in capturing key points of learning and integrating this new knowledge into their professional lives.

## Course Outline

### Negotiation in the Project Environment

- Stakeholder analysis
- Negotiating with key stakeholders
- Negotiation and the triple constraint
- Issues throughout the project life cycle

### Natural Tendencies in Negotiation

- Negotiating from positions
- Transformation of goals
- Destroying trust
- Need to win
- Emotional reaction

### Developing the Best Alternative to Negotiated Agreement (BATNA)

- Defining BATNA
- Determining the need to negotiate
- Strengthening the BATNA
- Using BATNA
- The other party's BATNA

### The Two Major Schools of Negotiation: Competitive and Collaborative

### Competitive Negotiation

- Determining primary and secondary issues
- Establishing the maximum and minimum positions
- Defining the conflict range
- Assessing the negotiation range
- Influencing the other party

### Understanding and Developing Your Negotiation Style

- Myers-Briggs Type Indicator® (MBTI) and communication style
- Personality preferences and style
- Temperament Theory and collaboration

### Collaborative Negotiation: Creating Win-Win by Exploring Differences

- Clarifying interests
- Developing options
- Establishing criteria

### Negotiating Within the Team

- Identifying interests
- Defining the process
- Determining roles

### Negotiating Between Teams

- Establishing an approach
- Monitoring the dialogue
- Clarifying all interests

### Preparing to Negotiate Your Project

- Analysing your situation
- Predicting the other party's situation

### Dealing with Conflict in Negotiation

- Insight from MBTI®
- Sequence of strengths as conflict escalates

### Breakthrough Strategies to Get Past "No"

- Managing emotional content
- Reframing vs. reacting
- Building a golden bridge
- Educating vs. escalating

### Maintaining and Building Your New Skills

- a. Personal Action Plan
- b. Other useful strategies for long-term gains

## Participants will learn how to:

- Identify and quantify the factors that help define the most appropriate vendor relationship
- Conduct a make-buy analysis
- Perform market research to identify an appropriate vendor
- Determine the appropriate contract type to facilitate success
- Determine when and how to establish collaborative relationships for win-win results
- Monitor and control vendor performance to achieve project objectives

## PMBOK® knowledge areas:

- Project Cost Management
- Project Risk Management
- Project Procurement Management
- Project Communications Management

## Programme Objectives

Determining when to use a vendor and how to select and manage a vendor effectively can make or break even the most carefully planned project. Understanding the factors that determine the most appropriate vendor relationship is crucial to your success. Proactive involvement in establishing the vendor relationship, from selecting the vendor, determining the appropriate type of contract, to establishing the contract terms is essential to effective vendor management and to the success of your project.

In this course, participants will be introduced to a unique model to help determine the most appropriate vendor relationship to address their various project needs. The course covers what project managers need to know to influence the contracting process in order to establish more effective, long-term, win-win relationships with capable, compatible “partners.” It explores activities that are essential to effective vendor selection and management: articulating

the right requirement, building the right relationship, finding the right partner, structuring the right contract and maintaining the right attitude between the parties.

The course will examine the pros and cons of three alternative contractual relationships: arm’s-length, collaborative and alliance. Emphasis is placed upon structuring and managing effective collaborative relationships. An integrated case study and appropriate exercises are used throughout the course to apply the lessons learned to real-world scenarios.

**Reminder:** This is not a course in the basics of contract management. It assumes that the student has already taken *Contract Management Principles & Practice*, or has equivalent experience involving contract management.

## Course Outline

### The Right Requirement

- Guidelines for developing the requirements
- Three ways to articulate a requirement
- ESI's Vendor Relationship Model
- Communicating the requirement

### The Right Relationship: Types of Business Relationships

- Arm's-length contractual relationships
- Collaborative contractual relationships
- Formal business alliances
  - Teaming agreements. Joint development agreements. Joint ventures. Minority business interest. Acquisition

### The Right Relationship: Ethical and Legal Issues

- Fairness in the source selection process
- Antitrust issues
- Treatment of contractors as employees

- International issues
  - Export control. Taxes and duties. Foreign Corrupt Practices Act

### The Right Partner: Best-Value Source Selection

- The process
  - Presolicitation process. Solicitation process. Award process
- Contents of source selection plan

### The Right Partner: Finding and Qualifying Your Partner

- Prerequisites for successful partnering
- Characteristics of a good partner
- Where to look for potential partners
- Characteristics of effective relationships

### The Right Contract: Types of Contracts

- Fixed price

- Cost-plus-fixed fee
- Time and materials
  - Cost-only incentives. Multiple incentives

### The Right Contract Agreement

- Types of master agreements
- Common elements of master agreements
- Specific requirements of master agreements
- Timing considerations

### The Right Attitude: Performance Management

- Kick-off meeting
- Performance plan
- Maintaining open communications
- Managing change
- Handling disputes

## Participants will learn how to:

- Identify the most common errors found in inappropriate, confusing or misconstrued narratives
- Employ easy techniques and “best practice” methods that will help you maintain consistently high quality in your SOW documents.
- Identify what a “breach of contract” entails
- Assist others more effectively in critiquing SOWs for quality, clarity and completeness.
- Utilise information on how the courts historically interpret disputes in contract language according to long-standing principles

## PMBOK® knowledge areas:

- Project Scope Management
- Project Time Management
- Project Cost Management
- Project Procurement Management

## Programme Objectives

Widely considered the “heart of the contract,” the Statement of Work (SOW) is the foundation of the relationship between buyers and sellers. The purchase or sale of products and services can only be executed by skilfully creating the SOW document. This course is designed for practical use by requirements developers, in-house SOW team members and other project managers and contract managers whose responsibilities include properly identifying needs and turning them into quality contracts. It provides the essential information project managers need, including basic contract management concepts, to consistently develop and administer effective SOWs.

The course employs challenging team exercises and case studies that will take participants through the process of building a solid statement of work. They will learn how outsourcing needs emerge within companies and how these needs are eventually recognised and articulated.

Participants will identify methods by which needs are analysed using proven tools to yield contract objectives that generate logic flow and consistency in the resulting SOW. This course defines the essential ingredients of the SOW, which include the scope and background statements, comprehensive listing of responsibilities for both buyers and sellers, deliverables and their schedules, acceptance criteria and special terms and conditions of performance.

Participants will also learn techniques for managing performance against the SOW requirements, including organising responsibilities, monitoring obligations on both sides of the bargain, as well as taking corrective actions and resolving disputes. The skills learned in this practical course can be immediately applied by anyone involved in writing, negotiating, awarding or administering SOWs.

## Course Outline

### The Basics of SOWs in Business

- The role and importance of the Statement of Work (SOW)
- A well-written SOW
- The essential elements of a contract
- Addressing risk management in SOWs
- Basic concepts of agency—agent law
- Types of authority at your company or organisation
- Basic concepts in contract law

### The Purpose of the SOW

- Relationship between master contract and SOW
- Conflicts in contracts
- Contract interpretation guidelines
- Different approaches to SOWs
- Uncertainty and risk in contracting
- Categories and types of contracts

### An SOW’s Concept Development

- Needs and requirements evolution in SOW development
- Sources of requirements
- Initiating requirements identification
- Ensuring clarity of requirements
- Use of a requirements analysis checklist

### The Use of a Requirements Definition

- The work breakdown structure’s relationship to requirements and the SOW
- Integral parts of the SOW format
- Outline for typical SOW
- Preparing an actual work breakdown structure (WBS)

### Creating the Narrative

- Problems associated with poor writing and poor construction
- Guidelines for writing SOWs
- Locating errors in a draft SOW
- Drafting an actual SOW

### Quality Assurance Through the Use of an SOW Master Checklist

- The purpose/rationale of a SOW master checklist
- The Use of the Master Checklist by the SOW writer

### Standard Tools Used for Preparing Quality SOWs

- Standard Outline for a typical SOW
- Checklists for identifying typical problems of poor or complicated narratives
- Master Checklist for the SOW writer
- Basic Project Management Glossary
- Basic Contract Management Glossary

### Long-Term issues for Quality SOWs

- Ways to monitor SOWs and performance issues
- Responsibilities of team members
- Having a sound contract administration plan
- Post-award orientation
- Proactive problem resolution

## Participants will learn how to:

- Properly prepare yourself to deliver a dynamic presentation
- Develop a theme and map out the flow of your presentation
- Use group exercises in the most effective way possible
- Affectively use PowerPoint® or other presentation software
- Deal with presentation anxiety in the best way possible
- Use the presentation style best suited for the situation
- Deal with any obstacle that may arise
- Properly handle the question-and-answer session

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## Programme Objectives

Do you have to make presentations at pre-proposal conferences, industry days, in front of source selection advisory boards, to internal pre-negotiation review boards or at other gatherings? Are you responsible for the oral presentation of your firm's proposal in negotiations with the government or other gatherings in the course of your duties? If so, this course is for you! If you don't have these responsibilities yet, this course will help you move along your career path. Programme and technical personnel will benefit from this course as well.

How do you prepare yourself to deliver the most effective presentation possible? We'll take you through each of the steps necessary to make your most effective presentation. You will learn how to plan your presentation by determining the basics, introducing group exercises, developing a theme for your presentation and determining the flow from beginning to end. You will learn essentials for delivering an

effective presentation, including tips for dealing with presentation anxiety, choosing a style most appropriate for your presentation and dealing with the difficulties you may encounter during your presentation. You will also learn some techniques for handling the question-and-answer period in the best possible way.

This course is designed to provide you with the fundamentals necessary to deliver an effective presentation and have the most optimum outcome. Whether you are new to delivering presentations or have some basic experience but feel you need to improve your abilities, you will gain invaluable presentation skills.

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## Course Outline

### Planning the Presentation

- The basics
  - Who
  - What
  - Where
  - When
- Introduction of the group exercise
- Theme development
- The opening
- The body of the presentation
  - Topical approach
  - Proper sequence
  - Basic theme
  - Smooth transitions
- The closing

### Delivering the Presentation

- Effective use of PowerPoint®/presentation software
  - Delivering your message
  - Selling your presentation
- The importance of practice
- Tips for dealing with presentation anxiety
  - Common ailment
  - Manifestations
  - Ways to manage/reduce anxiety
- What's hot and what's not in presentations
- Presentation styles
  - Methods used to identify key points and decisions
  - Top gripes of evaluators
  - Top likes of evaluators
- Four presentation styles
  - Reading
  - Memorising
  - Impromptu
  - Extemporaneous

- Three Vs in your presentation
  - Verbal
  - Vocal
  - Watch the nonverbals
- Dealing with difficulties
  - Common difficulties
  - Logistical support problems
  - Environmental distractions
  - Argumentative audience members
  - Having a plan of action
  - Points for "grace under pressure"
- Handling the question-and-answer session
  - Preparing for questions
  - Taking questions
  - Answering questions



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