

PROGRAMME MANAGEMENT COURSES

- Programme Management
- Aligning Project Management with Organisational Strategy
- Business Process Analysis, Innovation and Design
- Coaching and Mentoring for Improved Performance
- Critical Thinking and Problem Solving
- Negotiation Skills for Project Managers
- Unlocking the Power of Earned Value Management
- Leading Project Managers
- Managing Global Projects
- Rapid Assessment and Recovery of Troubled Projects
- Requirements Management: A Key to Project Success
- Taking Charge of Organisational Change
- Writing Statements of Work: The Heart of Any Contract
- Leading Complex Projects
- PgMP^(SM) Exam Preparation

Participants will learn how to:

- Increase the effectiveness of an organisation's approach to programme management
- Initiate and organise a large-scale programme to implement business strategy
- Manage stakeholder relationships effectively
- Manage, execute and control a successful programme consisting of multiple, related projects
- Establish and implement programme governance to ensure consistent alignment with organisational strategy
- Ensure the realisation of programme benefits

Programme Outline

Programme managers are, above all else, change agents. Their role has evolved in most organisations from that of managing multiple projects to implementing business strategy through an integrated portfolio of projects involving the management of multiple teams and executive-level stakeholders. As such, the programme manager today requires a refined set of business and leadership skills that are vastly different from that of a project manager. Yet, being an effective programme manager generally requires a firm foothold in project management. To many, programme management is the next logical step in the career progression of one of the world's fastest growing disciplines.

An integrated case study will provide you with the opportunity to walk through the entire life cycle of a programme while facing the types of realistic challenges you will surely encounter. You'll learn tools and techniques for programme governance, effectively managing stakeholders and ensuring that your programme realises its benefits and strategic objectives. You will learn "real-life" best practices presented and facilitated by instructors who have "been there, done that".

Course Outline**Defining Programme Management**

- Range of project oversight
- Portfolios vs. portfolio management
- Programmes vs. programme management
- Projects vs. project management

Linking Programmes to Strategic Goals

- Real-world examples
- Business case
- Programme Charter
- Methods

Programme Management Life Cycle

- Purpose
- Stages
- Pre-programme set-up
- Programme set-up
- Establishing programme management and technical infrastructure
- Deliver the benefits
- Close the programme

Maintenance and Support**Three Themes of Programme Management**

- Benefits management
- Programme governance
- Stakeholder management

Programme Planning

- Basic considerations
- Feasibility study
- Programme management plan
- Stakeholder management
- Programme architecture and benefits map

Programme Management Office

- Purpose and benefits
- Process control
- Process support
- Process Improvement
- Strategic goal alliance

The Programme Manager's Role in Delivering the Benefits

- Manage enterprise programmes and projects
- Manage change
- Provide support

Reporting Tools

- Checking programme "health" through programme and project reviews

Programme Risk Identification, Analysis and Response Strategy

Participants will learn how to:

- Understand and support top-level strategy formulation
- Ensure project credibility by aligning your project with your organisation's goals, objectives and strategies
- Create and implement an appropriate strategy for your project
- Understand the need to communicate your strategy to the project team, the customer, and other project stakeholders
- Manage stakeholder expectations to maintain portfolio/project alignment

Programme Outline

Today's business climate is characterised by unprecedented changes in technology and globalisation, as well as by complex business relationships and the unrelenting drive for competitive success. In this highly stressful environment, it is essential for project managers to think and act strategically. How does an organisation formulate a strategy to achieve competitive success? How do projects contribute to the implementation of the organisation's strategy? How should a project manager develop a project strategy that supports organisational strategic and business goals?

Aligning Project Management with Organisational Strategy gives participants an in-depth analysis of the process leading from business strategy formation to portfolio development to the project and project

manager's role. Participants will learn how to link their project to the business strategy, apply and maintain alignment of the project strategy, and manage the expectations and interests of those who have a stake in the project outcome.

Thought-provoking discussions and stimulating exercises highlight this dynamic, timely course. They will be given a proven project ranking tool that can be used within their organisation to prioritise strategic projects and/or to help them, the project manager, ask the questions to understand how the project fits into their organisation's strategic initiatives.

Course Outline**Organisational Strategy in Context**

- Strategy defined
- Strategy as a way to achieve organisational success
- Paradigm shifts and their impact – how change influences strategy
- Forces for business change
- The impact of organisational constraints on strategy

Organisational Strategy: Approaches and Techniques

- Strategy as a key to organisational success
- Elements of a successful strategy
- The relationship between strategy and achievability
- Strategy assessments
- Classic approaches and techniques for level- setting strategic thinking
- Towards setting up a culture of strategic thinking

Portfolio Management: Strategic Context

- Defining a portfolio
- Identifying projects included in a portfolio
- Challenges and benefits of portfolio management
- Influential roles in portfolio management

Portfolio Set-up and Maintenance

- Setting up a successful project portfolio
- Organisational influences of portfolios
- Generating potential portfolio projects
- Steps in selecting portfolio projects
- Integrating new projects into an existing portfolio
- Project performance and project gateway reviews
- The project filtering process

Strategic Project Management

- Strategic vs. classic project management
- Aligning projects with strategy
- The role of the project team
- The importance of managing change that affects strategic projects
- Anticipating and managing stakeholder expectations and resistance

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 Outline

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:

- Delegate work successfully
- Provide focused feedback to improve future performance
- Apply a structured coaching and mentoring model to guide you through the coaching and mentoring processes
- Improve the performance of others
- Work through difficult performance issues
- Apply techniques for evaluating performance

Programme Outline

Do you find yourself with too little time—and with too few resources with the necessary knowledge and skill to do the work that needs to be done? Are resource or performance issues creating roadblocks to your own success, and to the success of others? Imagine the benefits you and your organisation would realise if you could apply proven techniques to delegate successfully and to achieve the results you want— whether you have formal authority or not.

Coaching and Mentoring for Improved Performance will teach you how to apply a powerful behavioural coaching and mentoring model and a set of integrated tools that will improve the quality, efficiency and effectiveness of your coaching with lasting results— whether with direct reports, peers or those in more senior positions. Through practical exercises, group discussions and case studies, you will determine what work can be assigned and to whom based on current performance

levels and work load. You'll also learn how to delegate work with improved clarity and efficiency in order to establish a strong foundation for success.

During class, you will assess your own personal coaching style and learn how to leverage that style. You will learn how to more effectively deal with the typical and very challenging realities faced by coaches and managers in all types of organisations. And, you will also have opportunities to assess and discuss your own real-life coaching issues in a practical, highly engaging and thought-provoking environment. You will come away from this course with a structured approach for improving the performance of others—and, ultimately, a tool for raising the effectiveness for all those who work with you.

Course Outline**Why Coach?**

- Benefits of coaching
- Impact of coaching
- ESI Mindset Model
- Coaching Statement of Purpose

Coaching and mentoring

- Coaching and Mentoring Model
- Determining the appropriate style
- Coaching styles
- Coaching actions

Preparing to Coach

- Assessing personal coaching style
- Assessing learning styles
- Setting expectations
- Creating a plan

Coaching

- Aligning coaching style with performance level
- Delegating tasks
- Guiding performance Evaluating performance
- Providing feedback
- Handling performance problems effectively

Job and Career Coaching

- What's the difference?
- Job proficiency and job mastery
- Techniques to manage performance

Participants will learn how to:

- Use different thinking approaches at different times to yield better results
- Generate innovative responses to business problems and opportunities
- Assess your own thinking style preferences
- Think in the present to prepare for the future
- Determine the root cause of business problems and opportunities
- Apply different types of thinking for improved analysis and problem solving
- Assess possible responses accurately to select an optimal response
- Design and execute appropriate action plans

Programme Outline

Imagine if you could solve a problem once and it would go away. Or, if you could implement a solution that really works, or seize upon opportunities before it is too late.

This course presents a structured approach for tackling problems, opportunities and decisions that will ultimately help you get better results—whether you are innovating, managing crises or planning for the future. The course addresses the five types of critical thinking needed in business environments: strategic thinking, tactical thinking, analytical thinking, innovative thinking and implicative thinking. It also teaches a proven five-step process for responding to business problems and opportunities.

Through exercises, you'll practice using these different thinking approaches to achieve maximum results. You'll also have the opportunity to apply these concepts to a specific problem or opportunity from your own business environment, share newly learned approaches with classmates, and give and receive feedback on those approaches.

Course Outline**ESI's Critical Thinking Model**

- Analytical thinking
- Strategic thinking
- Tactical thinking
- Innovative thinking
- Implicative thinking

Problem/Opportunity Identification and Analysis

- ESI's Problem/Opportunity Response Process
- Identification and analysis
- Environmental scan
- Response exploration
- Response selection
- Response implementation
- Active vs. passive problem/opportunity identification
- "As is" vs. "To be"
- Tools and techniques for problem/opportunity identification
- Process flowcharting
- Root cause analysis

Environmental Scan

- What is an environmental scan?
- Internal scan
- External scan
- Stakeholder scan
- Business architecture
- Your business processes/business rules

Response Exploration

- Tools and techniques for exploring new and unique responses
- Other innovative thinking approaches

Response Selection

- Filtering
- Clustering
- Voting
- Capability and value analysis
- Response prioritization matrix
- Decision trees
- Implications analysis

Response Implementation

- Communicating the optimal response
- Gaining acceptance by stakeholders
- Managing expectations
- Saying "no" to high profile stakeholders
- Building an action plan
- Ensuring ownership and commitment

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 Outline

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

- Personal Action Plan
- Other useful strategies for long-term gains

Participants will learn how to:

- Harness the power of EVM to control your project
- Indicate work progress in a more objective way within and across projects
- Properly relate cost, schedule and technical accomplishment
- Relate time-phased budgets to specific tasks and/or statements of work to create a useful and realistic baseline
- Supply managers with information at a practical level of summarisation
- Prepare an action plan and create an immediate impact to your organisation's ability to effectively control projects

Programme Outline

You've been hearing the term Earned Value Management (EVM) for some time, and you have been introduced to the plethora of calculations involved. You've also asked yourself "Why do I care?" Meanwhile, management has been pushing you to explain what's really going on in your projects, and to tell them how you know that what you're telling them is true. When your team members tell you they're almost done, you think there's a light at the end of the tunnel—it sounds good, but should you stake your career on it? What you really need is a more objective way to evaluate and control your project and to provide management accurate summary information. In short, you need *Unlocking the Power of Earned Value Management*.

This course will take you beyond the calculations you've already learned. You'll review key project documents to gain an understanding of their relationship to effective project evaluation and control using EVM. You'll explore the challenges and approaches involved in establishing a baseline and obtaining accurate, timely and useful information to measure project performance with EVM. You will

benefit from relevant discussions with your peers and an experienced instructor.

Working through an integrated case study designed to simulate real-world issues, problems and decisions, you'll gain insight and experience in determining a realistic assessment of where your project actually stands. This approach allows you to practice new skills and ask questions as you assimilate a broad array of practical experience that can be immediately applied upon your return to the workplace.

Come to *Unlocking the Power of Earned Value Management* and leave with the knowledge and enthusiasm – plus a customised action plan – to enlist others in harnessing the power of EVM.

Recommendation: Prior to taking this course, you should have a good understanding of standard project management control tools such as network diagrams and responsibility matrices. In addition, a basic background in applying and managing cost and schedule metrics is desirable.

Course Outline

Evaluation and Control in a Project Environment

- What is the difference between evaluation and control
- The challenges to evaluation and control
- How do you accomplish effective evaluation and control?

Effective Earned Value Management

- EVM speak – know the language
- How to get "the numbers"
- OBS and WBS: What are they and why are they important
- Estimating cost and schedule honestly and accurately
- Setting the Performance Measurement Baseline (PMB)

Data Collection, Change Management and Baseline Maintenance

Earned Value in Action

- Formulas for control
- Variance tolerances and thresholds
- Are you in control?
- EVM rules

EVM Reporting

- EVM reports
- Tracking
- Project reviews

Implementation of Earned Value Management

- Requirements of the organisation
- Challenges to implementation
- Developing your plan for implementation

Participants will learn how to:

- Define the leader's role in each phase of the project life cycle
- Outline reasons for project successes and failures
- Use key performance indicators to monitor ongoing project progress
- Support project managers and project teams through coaching, mentoring and rewarding success
- Select the tools and techniques of project management that will help your organisation be successful

Programme Outline

As organisational hierarchies give way to dynamic, cross-functional project teams, senior managers find themselves challenged with adopting a "new economy" approach to managing project managers. The leader of project managers must bring order and rationality to a chaotic environment, identify opportunities to influence the direction of projects and provide the means for project managers to succeed. In addition, the leader of project managers must be skilled at managing project portfolios, allocating resources, reviewing projects and communicating appropriately. Above all, the manager of project managers must know the right questions to ask!

In this highly facilitated course, participants will learn soft and hard skills and approaches that lead to organisational success in the "management by projects" environment. Participants will also get expert perspectives and review best practices on issues critical to those who lead project managers.

Participants will enjoy lively debate and stimulating conversation that reinforces what they know and what they have learned.

This course provides the participant with a new way of thinking about the best way to lead people in conjunction with the underlying process of project management. It is a "must-have" for anyone responsible for leading and managing project managers.

Reminder: Participants should have a basic understanding of project management before taking this course. It is assumed that attendees currently or will soon lead project managers, with or without a direct reporting relationship.

Course Outline**The Leader of Project Managers (LPM) Role in the Project Life Cycle**

- Managing the Stage Gate process
- The project environment
- The role of management in each phase of the life cycle
- Defining project success within the organisation
- Organisational factors affecting project management
- Knowing the organisation's project management process

Managing a Multi-Project Environment

- The importance of rank ordering projects across the organisation
- Managing multiple project issues
- Resource allocation
- Issue resolution
- Resource pool considerations

Project Initiation

- Project selection
- Project charter
- Project funding
- Stakeholder considerations
- Financial tools
- Understanding margins

Leading and Managing Project Managers

- Challenges of leading and managing project managers
- Identifying, developing, evaluating and retaining project managers
- Rewarding success

The LPM's Role in Project Planning

- Risk management
- Cost estimates

- Schedule development
- Resource allocation
- Communications management
- Project plan review
- Project plan approval

Managing Relationships

- Communicating across the organisation
- Managing expectations
- Managing styles
- Mentoring/coaching
- Conducting effective meetings
- Supporting project managers of virtual teams
- Supporting diversity and cross-cultural teams
- Conflict/resolution

The LPM's Role in Project Implementation

- Project manager and team performance
- Asking the right questions
- Management oversight
- Determining if earned value is the project performance measuring tool to use
- Project reviews
- Project audits
- Understanding signs of trouble
- Project recovery and turnaround
- Change management

Project Close-out

- Early termination
- Project end evaluation
- Lessons learned

Participants will learn how to:

- Distinguish the unique characteristics of a borderless or global project effort
- Identify the elements of a global project plan needed to lay the foundation for success in dealing with the challenges inherent in global projects
- Incorporate global project environmental factors into your risk management plan
- Systematically approach and address the unique issues surrounding the management of global projects

Programme Outline

Global trends are reshaping the competitive dimensions in the world and are driving the need for increased use of "borderless," or global, project management. The management of the global projects cuts across organisational and national borders. To be successful, project managers must be prepared to overcome a unique set of obstacles. Special challenges arise from differences in cultures, mores, tradition, values, philosophies and languages of the project partners. In addition, attitudes of the project team in each of the partner organisations take on added importance. The financial risks and implications of the project can be immense, extending far beyond the financial capabilities of any one partner operating independently. Competition in the global marketplace is becoming dependent on using consistent organisational processes throughout the global community.

In *Managing Global Projects*, participants will learn how to systematically approach these complex global management issues as well as how to minimise the risks inherent in doing business in the worldwide marketplace.

Through an interactive case study based upon real-world scenarios, participants will experience what it really takes to manage a typical global project. They will develop an understanding of the many unique problems inherent in managing a global project and explore ways to solve them. The case study and exercises provide a clear roadmap for initiating, planning, implementing, controlling and successfully closing out a global project. Participants will also get numerous tips, templates and tools that they can apply to any of their global efforts.

Reminder: Participants should already have an understanding of project management tools and techniques.

Course Outline**Overview of Global Project Management**

- Characteristics of global projects
- Global project management challenges
- Global project manager skills

Initiating Global Projects

- Identifying global business opportunities
- Criteria for selecting a global project
- Global risks and threats
- Conducting a pre-project country study

Planning Global Projects

- Defining global project requirements and scope
- The Global Scope Management Plan
- The Staffing Management Plan and the project team
- Risk management planning for globally dispersed projects

Implementing Global Projects

- Political, social, economic, infrastructure, legal and industry-specific considerations
- Joint ventures and strategic alliances

- Negotiation norms and styles
- Intellectual property rights and laws
- Foreign Corrupt Practices Act (FCPA)

Controlling Global Projects

- Complexity factors in controlling global projects
- Characteristics of an effective project control system
- Organisational considerations for controlling projects across multiple countries
- Schedule, cost and quality control in global projects

Closing Global Projects

- Closing out a global project
- Challenges of financial and administrative closeout of a global project
- Repatriation challenges
- Documenting lessons learned

Participants will learn how to:

- Structure and lead the effort to assess project problems rapidly
- Determine the root causes of identified problems
- Develop a recovery plan for any troubled project
- Provide leadership to turn the project around
- Use seven key metrics as your guide to success
- Identify and manage signs of trouble early in a project

Programme Outline

If you're a project manager who is in the trenches every day, sooner or later you'll be staring in the face of a struggling project. The project may be your own or may have been one you inherited. Knowing what to do when the time comes will be critical to your success. You'll need to take action immediately-with speed, accuracy, power, balance and focus. You'll have little time to think about an approach or polish your skills.

Rapid Assessment and Recovery of Troubled Projects demonstrates a proven process to project recovery. Participants will get everything they need (process, tools, techniques) to perform a rapid assessment of a project in trouble, develop a solid recovery plan and manage the transition to stability.

Participants will experience what to do step by step, using seven key metrics as their guide to success.

Active participation in the case study, designed to simulate the environment and feel of an actual troubled project, will enable participants to build their skills in a meaningful way. This course is a must for experienced project managers who need to know what to do when the chips are down.

Reminder: Participants should have a thorough understanding of scheduling and cost control and risk management before taking this course.

Course Outline**Overview of Rapid Assessment and Recovery Process**

- Key variables: people, process, tools, metrics
- Key inhibitors and sensitivities
- Process summary

Developing Assessment and Recovery Charter

- Charter definition process
- Management expectations and sensitivities
- Critical resource needs
- Critical documentation needs

Planning the Assessment

- Plan assessment process
- Keys to performing good assessments
- Determining the approach and focus areas
- Seven key areas of assessments

Conducting the Assessment

- Assessment process
- Conducting interviews
- Analysing and validating project data
- Meeting with customers and stakeholders
- Determining and validating findings

Planning the Recovery

- Recovery planning process
- Determining and prioritising risks, problems and opportunities
- Prioritisation using the Comparative Risk Ranking and Comparative Problem Ranking
- Setting up metrics and an early warning plan
- Re-establishing the baseline

Transition and Stabilise the Project

- Translation process
- Executing risk, problem and opportunity management plans
- Skills transfer
- Implementing project control metric tracking

Avoiding Troubled Projects

- Project management skills and methodology
- Classic mistakes
- Continuous improvement systems
- Reviews

Participants will learn how to:

- Apply a requirements management process to a project life cycle
- Use proper evaluation techniques to verify and gain agreement upon requirements and that meet specific business and technical objectives
- Identify formal and informal techniques to manage stakeholder relationships within the requirements management process
- Implement a change management process to control scope creep

Programme Outline

Requirements are the foundation of any project, yet the number of project failures attributed to inadequate requirement development and management is staggering. As projects progress, "scope creep" often occurs due to the inability to manage constant change. Customers' needs and the project sponsor's needs frequently seem to be at odds. How does the project manager cope with all the turmoil?

Requirements Management takes the experienced project manager beyond the basics of all aspects of requirements, from concept through closeout.

Participants will learn up-to-date practices for requirements management, including proper selection of tools and techniques for specific types of projects. They will explore evaluation techniques to verify requirements early in the project life cycle so as to prevent costly rework downstream.

Even with a solid process for managing requirements, fallout may still result from the battle between important project stakeholders. Participants will practice methods of effective relationship management and negotiation to ensure agreement on functional requirements.

An action-packed, integrated case study will provide experienced project managers, who already have experience with the basics of requirements management, the opportunity to practice new skills in a supportive learning environment. Participants responsible for all types of projects, from construction to new product development to information technology, will take home tools and techniques to put to immediate use.

Course Outline**Requirements Factors Influencing Project Problems****The Project Requirements Process**

- The project management and requirements management life cycles
- Steps in the requirements management process
- Fixed and evolving requirements
- Organisational standards

Stakeholder Assessment

- Identification and categorisation
- Communication plan
- Risk factors

Reconciling Multiple Views

- Consideration of legal and market risks
- Relationship management process

Critical Success Factors

- Traceability matrix
- Global requirements mapping
- Test plan
- Requirements management standards

Requirements Definition

- Functional and technical requirements
- Global requirements
- Identifying multiple views
- Tools and techniques
- Documentation standards

Evaluation and Approval

- Selection of tools and techniques
- Requirement/prototype review
- Risk assessment
- Baseline documentation

Change Management

- Evaluate policy for project needs
- Establish business criteria for change control
- Select tools and techniques
- Success criteria

Validation of Project Outcomes

- Acceptance criteria
- Project test results
- Closeout Procedures

Participants will learn how to:

- Become a change agent
- Leverage organisational change for positive outcomes
- Help others deal with change
- Create a business case for an organisational change
- Consider other perspectives that impact change initiatives
- Apply a framework to plan and lead organisational change

Programme Outline

Are you experiencing anxiety or uncertainty stemming from a merger, acquisition, outsourcing, plant or base closure, staffing change or some other organisation change? Too often, change initiatives fail because of poor planning, resistance to change, and lack of vision and communication. With constant change occurring in most organisations, a better understanding of how organisational changes come about, how they are planned, and the challenges inherent in the change process will facilitate smoother transitions and organisational effectiveness.

This extremely interactive course provides an overarching approach for making change happen in organisations and helps participants embrace a mindset that welcomes organisational change. This course addresses how to assess whether change is necessary, as well as what needs to be changed and how to build a business case for a

change. Based on that, you will explore how to develop and articulate a compelling vision and strategy for change. The course will teach you how to engage support for change from stakeholders, as well as how to develop a successful communication plan that is key to any successful change initiative. Particular emphasis is placed on the emotional reactions to change and how to help people support change.

During class, you will work through real-life change scenarios and have the opportunity to plan for change and understand the impact of change from multiple perspectives. You will gain a better understanding of how you personally handle change and use strategies and tips to help others cope with change. You will come away from the course able to apply the framework, tools and approaches for leveraging the inevitable change that occurs every day in today's business environment.

Course Outline**Change Defined**

- ESI's Mindset Model
- Effects of change
- Resistance to change
- Core values inventory
- Framework for change

Being a Change Agent

- Assessing personal strengths
- Identifying personal barriers
- Being inspired by change

Need for Change

- "As is" and "to be" gap analysis
- Deciding what needs to change
- Developing a business case for change
- Prioritizing changes

Organisational Readiness

- Engaging support
- Articulating a compelling vision
- Gaining sponsorship
- Assessing stakeholders
- Identifying key roles and responsibilities
- Process and plan a case for change

Planning for Change

- Creating the change team
- Communication plan
- Strategy for change
- Measures and milestones
- Articulating the case for change

Implementing Change

- Changing business process
- Coaching and supporting the transition
- Helping others transition
- Preparing an implementation plan
- Sustaining organisational change
- Implementing the case for change

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

Programme Outline

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:

- Apply the concepts of complexity science to project management
- Use ESI's Complex Project Complexity Indicator to assess your project's complexity level
- Create an innovative framework for managing project complexity using ESI's Complex Project Management Model
- Select specific approaches and leadership techniques to increase your odds of success

Programme Outline

Have you ever taken on a project that appeared just too complex to handle? Just trying to identify the multitude of variables to be managed, let alone to anticipate how they might interact to create unexpected challenges, can be overwhelming. So how do you determine the true complexity, with a clear understanding of the variables involved and move forward to develop a plan that provides the right level of control and flexibility for success?

To manage the complex project requires a new way of thinking—a new approach to applying known project management techniques and tools. *Leading Complex Projects* provides a systematic approach to assess project complexity and to deploy the best approaches and techniques to achieve success.

Participants will learn to use ESI's unique Project Complexity Indicator and Complex Project Management Model to increase their effectiveness in controlling the complexity in your project. The Complexity Indicator is used as an assessment tool to determine the actual level of project complexity as the first step in developing a project management plan. The Management Model provides valuable

insight into the variables that create the complexity of your particular project. It enables the user to select existing tools from a new point of view that both limits the level of complexity and governs how the remaining complexity is used for positive results—in short, to stack the odds of success in their favour!

The exercises and readings are designed to give participants hands-on experience in determining the true level of project complexity, governing the use of complexity to assist rather than hinder progress. Among the tools provided is an automated template of ESI's Complexity Indicator. By answering the questions in the Complexity Indicator, this tool automatically calculates the project's complexity level, and plots the strengths and weaknesses of the project against the nine areas of PMBOK®. This course is a must for the experienced project manager who needs a leg up in managing the seemingly unmanageable!

Reminder: It is highly recommended that participants already have practical project management experience and a thorough understanding of project management tools and techniques.

Course Outline

Understanding Complexity in Projects

- Elements of complexity theory
 - Complexity
 - Self-organisation
 - Non-linear dynamics
 - Open/closed systems
- Leadership approaches and techniques
 - Competencies
 - Behaviours
 - Leaders in complexity

The Complex Project Model and Process

- ESI's Complex Project Model
- ESI's Complex Project Process
- Knowledge of complexity
- Communication
- Leadership
- Project Management

Determining Project Complexity

- ESI's Complexity Indicator
- Assessing complexity levels
- Applying the indicator

Communicating Project Complexity

- Communication platforms
- Risk and risk response
- Change Management
- Problem solving

Designing for Complex Projects

- OBS, PBS, WBS
- Design tasks
- Planning for project execution

Leading Complex Projects

- Leadership levels
- Clear vision
- Principles for leading complex projects
- Disciplines for leading complex projects

Participants will learn how to:

- Recognise the types of questions on the PgMPSM exam
- Describe PMI[®]'s perspective on how programme management is conducted
- Describe how to set up a professional programme including the themes of benefits management, stakeholder management, and governance management
- Describe how to manage a programme from initiation through closing
- Complete practice exams, giving you confidence in your understanding of the concepts and approach used in the PgMPSM exam
- Be able to recall and apply the mathematical formulas that will appear on the exam
- Evaluate many more "best" answers, rather than just "right" answers
- Determine what approach to use when you do not know the answer to the exam question
- Design the study approach best suited for your preparation
- Discuss major themes and issues for each topic area

Programme Outline

Developed with the input of certified Programme Management Professionals, ESI's PgMP Prep class provides learners with a foundation for understanding the nuances and details of the Project Management Institute's PgMP certification exam. This course will focus your studies on the information that you will need in order to successfully prepare for and pass the PgMP Prep exam. This course is not designed to instruct you in the basics of programme management, but instead to review those concepts and guide you on the terminology and the approach taken in the PgMP exam.

In addition to a course facilitated by a certified PgMP, the participants in the PgMP Prep class will receive the *PgMP Exam: Practice Test and Study Guide* featuring hundreds of sample questions and answers compiled by certified Programme Management Professionals with first hand experience taking the PgMP exam.

This course is for the programme manager who has a solid understanding of programme management and is now prepared to take the exam, but wants to ensure that the terminology, practices, and approaches that he or she uses mirror the way they are expressed on the exam.

Course Outline**Foundations of Programme Management**

- Overview of Programmes and Programme Management
- The Three Themes of Programme Management
- The Programme Life Cycle

Defining the Programme

- What Is Involved in Programme Definition?
- Making the Business Case
- Identifying Programme Stakeholders and Developing the Stakeholder Management Plan
- Establishing Programme Governance Procedures

Initiating the Programme

- What Is Programme Initiation?
- Establishing a Programme Governance Structure
- Authorising Constituent Projects
- Creating the Programme Team and the Programme Office
- Planning for Programme Benefits
- Analysing Stakeholder Expectations

Planning the Programme

- What Is Programme Planning?
- Planning for Benefits Management
- Communicating to Programme Stakeholders
- The Importance of the Programme Management Plan
- Scope Definition and the Programme Work Breakdown Structure
- Communications Planning
- Interface and Transition Planning
- Schedule, Cost, and Resource Planning
- Quality Planning
- Risk Management Planning and Analysis
- Planning Purchases, Acquisitions, and Contracts

Executing the Programme

- What Is Programme Execution?
- Executing the Programme
- Performing Quality Assurance
- Acquiring and Developing the Programme Team
- Managing the Procurement and Contract Process
- Distributing Programme Information to Stakeholders

Controlling the Programme

- What Is Programme Control?
- Monitoring Programme Benefits
- Integrated Change Control
- Monitoring Programme Scope and Performing Quality Control
- Controlling Programme Resources, Cost, and Schedule
- Managing Programme Issues and Risks
- Reporting Programme Performance to Stakeholders and the Governance Board
- Programme Contract Administration

Closing the Programme

- What Is Programme Closeout?
- Closing the Programme
- Closing Out Programme Components
- Closing Out Programme Contracts
- Managing the Programme Transition Plan



ESI International

Tel: +44 (0) 20 7017 7100

www.esi-emea.com