PmCentersUSA®

Project Management, Agile & Business Analysis Solutions and Services

Helping Your Team Achieve Organizational Alignment, Effectiveness and Accountability

Project Management Institute (PMI)®
Aligned Services for Organizations

Project Management-as-a-Service
Private and Custom Corporate Training
Consulting

PM Authorized Training Partner 2025

CIO Review 10 MOST PROMISING PROJECT MANAGEMENT CONSULTING/SERVICES COMPANIES - 2019

PmCentersUSA®

Welcome and thanks for your interest in PMCentersUSA!

For over 25 years, our team has supported the Project Management, Agile and Business Analysis training, consulting, and specialty staffing needs of organizations both large and small throughout the country and across the globe. Our noted Subject Matter Experts, instructors, and consultants deliver custom solutions that help companies meet their strategic objectives through improved project execution, accountability, effectiveness and delivery. PMCentersUSA has earned the trust of our clients by consistently presenting high-quality, results-driven specialized services and solutions that rival those of the Big 4, with low risk and much lower cost. We collaborate with clients to provide sound enterprise solutions that enable them to realize improved project performance.

All our corporate solutions are aligned to the internationally accepted standards and best practices of the Project Management Institute (PMI)® and the International Institute of Business Analysis (IIBA)®. PMCentersUSA is a PMI Authorized Training Partner (ATP) with PMI-ATP certified instructors to teach the PMI PMP Exam Preparation course for those pursuing professional certification. In and around our corporate headquarters in Pittsburgh, Pennsylvania, we offer private and custom organizational training programs, including our Master's Certificate in Project Management, through our alliance with the University of Pittsburgh's Katz Graduate School of Business, Center for Executive Education.

Corporate Solutions Overview:

1. **Project Management-as-a-Service (PMaaS)** – This fixed-price, innovative specialty staffing solution features a defined service level agreement and delivers proven project resources to organizations with pressing project needs. We deploy a team of 1-25 resources, including Project Managers, Scrum Masters, or Business Analysts, within an average of 2-4 weeks with service level agreements.

2. **Private Training** – This solution provides live-instructor-led onsite or virtual off-the-shelf PMI and IIBA-aligned training for companies seeking a best-practices-based education. Through engaging course case studies and exercises, our senior instructors help your teams learn how to apply core disciplines in Project Management, Agile, and Business Analysis to their work.

3. **Custom Training** – Leveraging our standards-based curriculum as a starting point, our SMEs collaborate with corporate clients to customize a course or program to their project environment. Live-instructor-led onsite or virtual custom training fosters enterprise adoption of project processes and drives targeted learning outcomes for high ROI.

4. **Consulting** – Our Subject Matter Expert Consultants assist organizations facing the challenges of increased or changing demands from the business. We consult with you to provide skills assessments and gap analysis, implementation of PMOs, project audits and reviews, improvements to project processes, and mentoring services to assist with agile transformation or other change efforts.

Move your strategic dial forward, by engaging us to drive improved organizational alignment, effectiveness, and accountability. Contact us or visit our website (www.pmcentersusa.com) to learn more about engaging our corporate services and solutions.

President & Founder

Vice President Emeritus

Meet Our Subject Matter Experts

Joseph A. Lukas PMP, CCP, CSM, PE, is Vice President Emeritus, Senior Solutions Consultant, and Senior Instructor for PMCentersUSA. He leverages more than 30 years experience in project management and business analysis spanning numerous industries, including; manufacturing, product development, information technology, and construction. Joe also has program and portfolio management and international projects experience. Among his varied strengths, Joe has demonstrated expertise in scheduling, earned-value analysis, risk management, and interpersonal skills such as personality styles. He assists clients seeking specialized project management solutions such as the development or optimization of PMOs, project management performance improvement initiatives, and custom project management enterprise training programs.

Joe is a PMI® certified Project Management Professional (PMP)® and a Scrum Alliance Certified Scrum Master (CSM)®. While living in Rochester, NY, Joe was very active with the local PMI® Chapter, serving in various positions including two terms as Chapter President. His efforts in growing the Rochester Chapter were recognized in 2001 when Joe was honored with an award for his outstanding contributions to the Chapter. Early in his career, Joe received his Professional Engineer license following his graduation from Syracuse University where he earned B.S. degree in Chemical Engineering. He is a Certified Cost Professional (CCP) for the Association for the Advancement of Cost Engineering (AACE), and has served on the Genesee Valley Section Board in various positions including Section President.

Joe was honored to receive the 2017 AACE Technical Excellence Award, bestowed in recognition of his outstanding technical contributions made in the project and cost management community. His previous AACE honors include receiving the Jan Korevaar Outstanding Paper Award at the 6th World Congress on Cost Engineering, Project Management, and Quality Surveying at the 52nd AACE international meeting. The award is presented at each World Congress to the author of the paper which receives the highest attendee evaluations of all papers presented at the Congress. Joe's award-winning paper on "Earned Value Analysis - Why It Doesn't Work," covered the common errors encountered in implementing earned value on projects and recommended corrective actions.

Joe has also been a guest instructor on project management for many universities, including the University of Pittsburgh, the University of Houston-Clear Lake, Stevens Institute, the State University of New York (SUNY) at Brockport, St. John Fisher College, and the Rochester Institute of Technology (RIT).

Since joining PMCentersUSA in 2008, Joe has focused on developing customized private training programs for organizations nationwide and assisting clients to set up PMOs and Centers of Excellence in Business Analysis and Project Management. Joe Lukas is a thought leader and has published more than 30 articles on various project management topics He is a frequent presenter on subjects related to Project Management and Business Analysis at national, international, professional societies, virtual expos, and events.

Richard F. Clare PMP, CBAP, CSM, MSPM is Partner and Director for PMCentersUSA. He has more than 30 years of experience as a developer, business analyst, manager, trainer, project manager, and scrum master. Rick is responsible for maintaining the PMCentersUSA courseware, providing expert consulting services to clients, and constructing customized training material targeted at an individual company's methodologies.

Rick's earliest career experience was as an Oracle Database Developer, performing analysis, design, training, development, and documentation on numerous database systems using Oracle and its complete set of development tools.

Rick is a certified Project Management Professional (PMP)® who has managed projects in Retail, Healthcare, Energy, Banking, Finance, and Compliance. Rick has served in the role of Certified ScrumMaster (CSM®) on many Scrum projects, bringing a real-world outlook to what can be a confusing arena for many organizations.

As one of the first Certified Business Analysis Professionals (CBAP®) in the world, Rick has worked extensively with the International Institute of Business Analysis (IIBA)®, serving as the Vice President of Chapters at the international level for two years. Rick was awarded IIBA®'s highest award for volunteer work during the Building Business Capability conference in 2011.

A passionate expert in project management, business analysis, and agile concepts, Rick has routinely been invited to speak at various conferences. Some of his past presentations include Oracle's IOUG, the Project Management/Business Analysis World conference, PMI Global Congress, the Building Business Capabilities conference, CIO Executive Forums, and many PMI and IIBA chapter meetings.

Rick is a graduate of the University of Manitoba in Winnipeg, Canada, and earned his master's degree in project management from Northeastern University, where he now serves as an adjunct professor as well as the Principal Agile Instructor.

Meet Our Staff – We're Here to Help You

Jodi Cagno,
Partner/Sales Manager

Lauren Schifano Herzing,
Partner/Sr. Account Executive

Katie Brunner,
Sr. Account Executive

Anastasiia Yurchenko,
Training Coordinator

CONNECT WITH US

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EMAIL: ***information@PMCentersUSA.com***
JOIN OUR TEAM: ***www.PMCentersUSA.com/submit-a-resume/***

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Certification and Accreditation

Authorized Training Partner of the Project Management Institute (PMI)®

In 2020, PMCentersUSA became an Authorized Training Partner (ATP) for the Project Management Institute (PMI)® by meeting strict criteria for eligibility. Our ATP status replaces the PMI® Registered Education Provider (REP) status which we had held since 1999 when we originally became a Charter Global member of PMI. Our association with PMI signifies that our instruction is of the highest quality and in alliance with PMI's *A Guide to the Project Management Body of Knowledge, (PMBOK® Guide), The Agile Practice Guide,* and other standards they uphold for the profession.

Professional Development Units (PDUs)

PMCentersUSA is approved to award Professional Development Units (PDUs) for our PMI approved courses. PMI uses PDUs to measure education hours.

Project Management Professional (PMP)® Certification / Continuing Certification Requirements

Like many in the field of project management, you may be interested in earning PMI®'s Project Management Professional (PMP)® designation to add value and independently authenticate your position as a certified PMP®. To be eligible from an education perspective to sit for PMI's PMP exam, you must earn a minimum of 35 hours (PDUs) of education, specifically in project management. PMPs who seek to maintain their PMP credential are required to earn 60 PDUs every 3 years. For specifics on PMI's requirements for PMP certification and continuing certification, visit the PMI website at www.pmi.org.

PMI® Professional in Business Analysis (PMI-PBA)® Certification / Continuing Certification Requirements

The PMI PMI-PBA® designation adds value and independently authenticates those focused in this position as a certified Professional in Business Analysis. Business Analysis training from PMCentersUSA helps you prepare for this prestigious certification by addressing these critical areas in PMI's *PMBOK® Guide* and other BA reference materials. To be eligible to sit for the PMI-PBA exam, you must earn a minimum of 35 hours of education, specifically in business analysis. PMI-PBAs who seek to maintain their credentials are required to earn 60 PDUs every three years. For specifics on PMI's requirements and continuing certification, visit the PMI website at www.pmi.org.

The PMI Talent Triangle is a trademark of the Project Management Institute, Inc.

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IIBA, CCBA, CBAP and the IIBA EEP logo are registered marks of the International Institute of Business Analysis. EEP and ECBA are trademarks of the International Institute of Business Analysis.

University of Pittsburgh | Center for Executive Education
Joseph M. Katz Graduate School of Business

University Alliance
Private and Custom Organizational Programs in Project Management and Business Analysis with PMCentersUSA

In and around Pittsburgh, Pennsylvania, PMCentersUSA offers award-winning project management, agile, and business analysis training programs for organizations through our University Alliance with the University of Pittsburgh's renowned Joseph M. Katz Graduate School of Business, Center for Executive Education.

Our Subject Matter Expert instructors have many years of hands-on project experience and bring a broad range of high-value expertise to the private virtual or onsite classrooms of our clients across all industries. Our team facilitates effective knowledge transfer among students and reinforces best practices as defined by the Project Management Institute (PMI)® and the International Institute of Business Analysis (IIBA)® through lively breakout sessions, case studies that simulate actual project scenarios, and active dialog between teams to enhance learning.

Private courses award PDUs, PDs and/or CDUs and can be delivered onsite or online during hours that work for your organization. The University of Pittsburgh awards a *Masters Certificate in Project Management* upon completion of our six-course/84 hour track. All of our programs provide a broad and practical curriculum that builds the confidence and skills necessary to tackle the challenges presented on projects in any work environment.

Organizational private training programs can be delivered for a specific group of employees or rolled out across an enterprise to accelerate learning and instill consistency in the application of PMI® and IIBA® best practices. Organizations also have the option to customize their training. In so doing, company-specific project methodology, templates, and procedures may be incorporated into the PMCentersUSA curriculum to closely align the course content to established project processes within the organization. Other ways to tailor the PMCentersUSA curriculum include incorporating industry-specific course exercises or case studies so that employees can readily grasp the PMI® and IIBA® concepts in relation to their day-to-day project responsibilities.

Why our Customers Recommend PMCentersUSA

"The PMCentersUSA instructor taught the best practices in Project Management and he explained the principles with his extensive professional experience in managing projects over the years."
- Principal Scientist - Enabling Technologies

"I highly recommend this training from PMCentersUSA for anyone who is serious about REAL project management."
- Independent Project Management Consultant

"Whether you are a certified PMP® or not, the information provided in these advanced courses is beneficial. I see immediate impact to job-related issues. It is beneficial for people to understand a common language both in MIS and the clients. I now have the skill set to put this in place."
- Project Manager - PNC Bank

"The knowledge I received from attending a PMCentersUSA Business Analysis course has been irreplaceable. Also, the manner in which the course was instructed and delivered was first class. I would recommend courses offered by PMCentersUSA to anyone looking to further their professional development."
– Ryan Winter, Senior BPM Developer PSCU

Project Management-as-a-Service:
Specialty Staffing Solution for Organizations

In today's fast-paced business climate, organizations are finding that the demand for skilled project management, agile, and business analysis professionals in the United States far outweighs the readily available talent. PMCentersUSA has been in the business of project management for more than 20 years, providing solutions to support clients facing this predicament. Our innovative specialty service addresses this high-demand need for qualified project management talent when your internal resources are scarce or your demands spike.

Engage our team of proven project consultants under a streamlined professional staffing solution, backed by our noted Technical Subject Matter Experts, to assist in the successful delivery of your key initiatives.

Benefits:

1. ***Quality*** – We deploy proven project professionals -- qualified, supported, and monitored by our distinguished PM & BA Technical Subject Matter Experts.
2. ***Scalability*** – We provide 1-25 resources every 10 days (included are PMs, BAs, Scrum Masters, Program Managers)
3. ***Speed*** – Time matters! Average time to start a resource is based on a Service Level Agreement (SLA), which is measured in days.
4. ***On-Demand*** – Engage our service anytime you need experienced project practitioners quickly that you can count on.
5. ***Cost Predictability*** – We charge a flat, monthly service fee.
6. ***Simplification*** – Our PMaaS process dramatically simplifies and streamlines traditional efforts to on-board qualified project resources and delivers results.
7. ***Co-employment Risk*** – Eliminated.
8. ***Trusted Service Provider*** – We're a leader in the project management industry, a Project Management Institute (PMI) Award-Winner and Charter Global REP since 1999 with 20 years of cumulative experience delivering specialty PM & BA solutions throughout the U.S.
9. ***Breadth & Depth*** – We offer Big 4 capability at a fraction of the price.
10. ***Satisfaction Guarantee*** – Your success = our success. We partner with you to ensure your satisfaction with our service!

Our service is available for organizations in need of 1-25 project resources for a defined SOW engagement.

PMCentersUSA offers clients the ability to procure our project consultants under a streamlined professional solution, backed by our noted Technical Subject Matter Experts, to assist in the successful delivery of key initiatives.

Enterprise TrainingPerks℠

Earn a Complimentary, Live Private Virtual Training with every PM-as-a-Service Placement

Enterprise TrainingPerks℠ Offer:

At PMCentersUSA, we believe in empowering our clients with comprehensive solutions. When you engage our consultants under the PM-as-a-Service Solution, you gain access to our TrainingPerks program. For every consultant in a 40-hour-per-week engagement, your organization will earn one TrainingPerk for every month on assignment. One TrainingPerk equals one hour of training. You can redeem your TrainingPerks for any project management, business analysis, or agile course. These courses will be delivered virtually over Teams or Zoom, for up to 25 attendees!

Program Details:

1. Every placement under the PM-as-a-Service SOW counts towards the TrainingPerks program
2. One billable month = One TrainingPerk per consultant
3. One TrainingPerk = One hour of training
4. TrainingPerks can be redeemed for any 7- or 14-hour PM, BA, or Agile course
5. Maximum course enrollment is 25 people
6. The training course will expire after 1 year if not redeemed
7. TrainingPerks are not redeemable for cash or discounts

Available Courses:

Project Management

- 7-Hr Intro to Project Management
- 7-Hr Best Practices for Project Communication
- 7-Hr Best Practices for Controlling Project Cost
- 7-Hr Best Practices for Managing Project Resources
- 7-Hr Best Practices for Implementing Project Procurement
- 7-Hr Best Practices for Managing Project Quality
- 7-Hr Best Practices for Defining Project Scope
- 7-Hr Best Practices for Developing Project Schedules
- 7-Hr Best Practices for Managing Project Risk
- 14-Hr Managing Multiple Projects*
- 14-Hr Project Leadership*
- 14-Hr Project Management Overview*
- 14-Hr Management of Resources, Stakeholders, and Communications*
- 14-Hr Risk and Procurement*
- 14-Hr Schedule and Cost*
- 14-Hr Scope and Quality*

Business Analysis

- 7-Hr Building a Solid Foundation for Testing
- 7-Hr Introduction to Business Analysis
- 7-Hr Preparing Effective Use Cases
- 7-Hr Requirements Analysis
- 7-Hr Requirements Elicitation
- 7-Hr Solution Evaluation

Agile

- 7-Hr Agile Product Owner
- 7-Hr Introduction to Agile
- 14-Hr Introduction to Agile*

Make it a TrainingPerks℠ Power Play!

Have a need for multiple resources? The more resources you engage, the faster you earn! For example, if you engage 7 resources, after one month you'll be ready to book your first 7-hour PM, BA or Agile course!

For a limited time only!**
Please contact your account manager,
or call us at 1-866-963-8621
for additional information.

***Terms and Conditions Apply*

Consulting Services

For organizations seeking help with Project Management/Agile, Project Controls or Business Analysis, PMCentersUSA is a trustworthy resource providing a range of services to deliver transformational outcomes for our clients.

Since 1999, we have been aligned with the Project Management Institute (PMI)®, serving our clients in the areas of consulting and organizational training based on the standards and best practices established in PMI®'s *A Guide to the Project Management Body of Knowledge, (PMBOK® Guide), The Agile Practice Guide* and other PMI® global standards. We are also an Endorsed Education Provider (EEP™) for the International Institute of Business Analysis (IIBA®) and serve clients seeking assistance from a consulting or organizational training perspective on improving their practice of business analysis. We also help reinforce adoption of the underlying principles of the AACE® International Body of Knowledge, *Total Cost Management (TCM) Framework®* to assist companies seeking to improve their systematic approach to each practice area of the cost engineering field.

Our seasoned practitioners and Subject Matter Experts offer keen insights acquired from their wide-ranging experience in project, program, and portfolio management, as well as agile, project controls, and business analysis, within both the private and public sectors. PMCentersUSA works closely with organizations to understand their unique challenges and recommend proven solutions to drive improved performance.

Our Consulting Services include:

- Organizational Assessment & Gap Analysis
- Pre/Post Project Audits and Reviews
- Review, Create or Augment Project Process, Procedures, Templates & Tools
- Creation of PMO or BA Center of Excellence
- Organizational Professional Development Consultation
- Agile, PM & BA Courseware Customization & Licensing

Review of Project Process, Procedures, & Templates

PMCentersUSA utilizes our extensive library of effective business analysis, project management, and project controls documentation to support organizations seeking to improve their project methodology. We perform project assessment services and recommend specific methods to optimize your processes and streamline your procedures and templates. In addition, we can assess an organization's use of project management software tools and make recommendations for sustained improvements or targeted training as needed.

Project Reviews, Coaching, & Continued Suspport

Our experienced consultants work with organizations to assess a project in its entirety or to focus on a certain area of concern such as cost, schedule, quality, or contract/regulatory compliance to enhance existing practices. Our project management, project controls, and business analysis consultants also provide coaching and continued support for organizations. Coaching is a proven hands-on method of working one-on-one with key individuals or small teams and typically includes:

- Cultivating skills and leadership development
- Providing guidance in policy, process, and methodology
- Applying newly-learned skills to actual projects
- Developing skills specific to an organization or project

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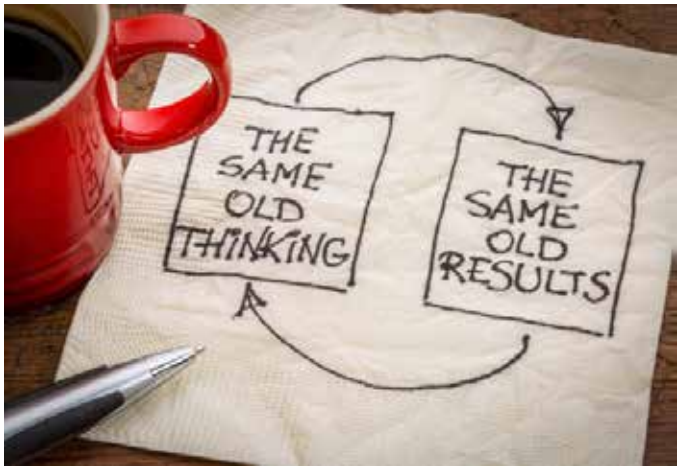
Organizational Professional Development Consultation

PMCentersUSA assists companies interested in obtaining project management, project controls, and business analysis training for their personnel as part of an organizational professional development training initiative. For any organization to gain meaningful value from such an undertaking, we consistently recommend that all members of the company – from the executives to the project team members - participate in the training program. This ensures that a common understanding is established across the organization, providing the best foundation for success.

Oftentimes, we are asked to customize our standards-based training curriculum to incorporate a company's proprietary methodology or reflect a particular industry to make a private training program very specific. In such cases, we offer organizations the ability to license our customized course(s) for integration into the company's internal training programs. Customization efforts can also include developing unique case studies or exercises to meet a client's distinct learning objectives. Leveraging our consultative approach, PMCentersUSA works collaboratively with our clients to produce and deliver powerful training programs that can affect positive, transformative change.

Customized Training Programs



If your organization requires targeted learning support in any area of project management, business analysis, or agile, engage PMCentersUSA to implement a custom training program uniquely customized to your specific environment and needs. We start with use of industry-aligned curriculum, including our Project Management Institute (PMI)® award-winning courseware, and customize it to include hands-on exercises or a case study designed to illustrate key learning objectives and drive adoption of your organization's processes and methodologies.

PMCentersUSA Subject Matter Experts (SMEs) will work closely with your team to identify the training areas of greatest need to ensure your organization receives the highest ROI from your custom program.

Our Proven 5-Step Approach:

1. ***Define the Scope*** – We help you to identify those within the organization in need of professional development, from executives to project team members
2. ***Create a Plan*** – We collaborate with you to develop a customized training approach aligned to your organization's priorities
3. ***Determine Training & Delivery*** – We assist you in determining course selection and level of customization and establish a schedule for roll out
4. ***Deliver Private Program –*** We deploy our exceptional instructor team of SMEs to deliver your program and ensure knowledge comprehension through hands-on learning and active engagement
5. ***Measure Success*** – Upon completion of your program, we meet to evaluate the success of the training and address any additional needs, including consulting or staffing to reinforce the adoption of newly-learned concepts

Benefits of a Custom-Designed Program:

- ***Organizational Alignment*** – Receive private training that's developed to drive change, organizational alignment, value creation, and attainment
- ***Corporate Branding*** – Create a training program addressing your company's methodologies for managing projects successfully in your environment (The "Your Company" Way)
- ***Custom Configuration*** – Select from our wide range of courses, from fundamental project management to probabilistic cost analysis and agile/scrum-aligned courses, to best meet your organization's training needs and choose how, when, and where they are delivered

Leverage our Subject Matter Experts (SMEs) to assist with:

- ***Legacy Artifacts*** – Review your methodologies, tools, templates, and procedures to validate your existing model or recommend changes as needed
- ***Project Reviews*** – Analyze historical project data to improve outcomes of future projects
- ***Specialty Solutions*** – Project Management-as-a-Service offers experienced PM, Agile and BA practitioners backed by our Technical SMEs to assist in delivery of your most critical, time-sensitive, and visible projects

Customized programs to meet your specific training needs!

Private Off-The-Shelf Training Programs

Private Training Programs – *When Consistent Knowledge Transfer Matters Most*

Engaging PMCentersUSA to implement a live, instructor-led, private, Project Management or Business Analysis training program ensures that your team will learn PMI® and/or IIBA® standards-based concepts and techniques supported by project professionals worldwide. You'll benefit from our cumulative 20+ years of experience in delivering corporate training programs leveraging our award-winning off-the-shelf curriculum. We offer organizations live, instructor-led training to accommodate your teams in a traditional classroom onsite at a facility of your choosing, or online leveraging a virtual instructor-led classroom via MS Teams, Zoom, or other meeting platform.

- ***Traditional classroom*** features a highly-interactive classroom on-site at your facility where students and instructors connect face-to-face, engage in lively dialog, and learn about new concepts through in-class exercises and group breakout sessions

- Our robust ***virtual, instructor-led classroom*** enables companies with dispersed employees to gain all the benefits of the traditional classroom but with the convenience of online learning, including team collaboration through virtual breakout rooms, and real-time interactions

All of our project management, project controls, or business analysis courses or programs, including our Master's Certificate in Project Management program, are designed to be delivered privately for groups or organizations.

Some of our most popular private programs and courses, include:

Master's Certificate in Project Management Program (84 PDUs)
- 6 focused 2-day courses covering best practices from PMI®'s *A Guide to the Project Management Body of Knowledge, (PMBOK® Guide)* and *The Agile Practice Guide*.
- Master's Certificate in Project Management awarded by PMCentersUSA upon completion

PMI PMP® Exam Prep (35 PDUs)
- PMI's authorized instructor-led curriculum for PMP exam preparation
- Course modules immerse you in real-world scenarios, representing various industries and project management situations to help you practice applying principles and concepts at work
- Over 200 cloned PMP® Exam questions provided by PMI to help you practice test taking, along with answers for self-review
- Appreciate the scope of knowledge covered by the exam and get additional support with supplemental learning material provided by PMCentersUSA
- Prioritize study targets in preparation to write the exam

Introduction to Agile (14 PDUs)
- An overview of Agile methodologies including Scrum, Extreme Programming, Kanban, Feature Driven Development, Lean Development and DSDM
- Attendees will be able to describe the five levels of agile planning from vision down to daily scrum meetings and define the roles and responsibilities for the three primary roles on an agile project

Project Management Overview (14 PDUs)
- 2-day best practices aligned course emphasizing the fundamentals of project management in today's business world
- Active learning via an integrated case study sample project providing attendees with hands-on experience applying project management concepts to changing project scenarios

3-Day Business Analysis Training (21 PDUs)
- Presentation of the fundamental knowledge needed for doing business analysis activities on projects, both Waterfall and Agile
- Attendees learn how to prepare a basic plan for business analysis on a project and elicit project requirements using various techniques
- Understand the Business Analyst's role on an Agile project

PmCentersUSA® IT Staffing & Service Solutions Partner

ConsultUSA®

About Us

ConsultUSA is a nationally-focused, full life cycle IT Staffing Solutions organization with a dedicated team of highly-talented professionals that has provided quality services to our clients for over 25 years. Jointly with our solutions partner PMCentersUSA, we seek to generate long-term sustainable client and employee value and relationships by exceeding expectations in all areas of our business. We constantly strive to enable our clients to realize greater value through use of our innovative services, which include:

IT Staffing-as-a-Service

This guaranteed staffing solution enables clients with demanding project needs to engage ConsultUSA through a Statement of Work (SOW) to on board from 1 to 25 IT or Project Management resources within 2 - 4 weeks. Our team works with you to understand and qualify your needs. Once the engagement logistics are finalized, our team will interview, test and screen candidates to deliver qualified professionals who match your business needs. Our service comes with a satisfaction guarantee on all resources deployed throughout the engagement.

Traditional IT Staffing

For clients in need of traditional staff augmentataion services, we provide talented resources skilled across a wide range of technical areas: Application Development/DevOps, Infrastructure, Enterprise Data Management, Security, Project Management and Business Analysis. Clients can engage us to fill contract, contract-to-hire, or direct placement needs. Traditional staffing is ideal for clients that require skilled IT resources for defined project needs, or for contract-to-hire recruiting assistance.

Project Staffing Solutions Provider for Enterprise System Implementation/Application Rollout Projects

Breadth and Depth: ConsultUSA has over 25 years of results and demonstrated capabilities providing organizations with end-to-end project staffing services. We deliver experienced and reliable professionals to perform end-user training and support to assist organizations promote adoption and proper usage of new systems or applications. ConsultUSA combines its competencies in IT staff augmentation with the experience of our sister company, PMCentersUSA, in managing complex training initiatives to provide clients with this streamlined project staffing solution.

High Trust, Time Critical Results: Upon kickoff of an engagement, ConsultUSA provides a project-ready team of talented IT systems/application trainers, project team leads, and end-user support professionals. We work with our clients to understand the project schedule and confirm expectations. Once the project is in execution phase, ConsultUSA works closely with our clients and project team to ensure success.

Full Collaboration: We meet weekly with the client to communicate on project status and our team's performance to address any risk or schedule impacts to the project milestones. We maintain regular communication throughout the project. To minimize administrative time and cost for clients, we provide consolidated monthly billing with reconciliation at the end of the project.

Specialty Areas of Focus

- Project / Program Management
- Business Analysis
- Application Development/DevOps
- Enterprise Data Management
- Infrastructure
- Security

Trusted Staffing Partner

ConsultUSA has more than 25 years of demonstrated experience providing excellence in staffing services to clients of all sizes across the country. We work directly with organizations to service their fluctuating project needs for a wide range of IT talent across various industries.

The most common forms of engagement:

- **Contract** is a popular engagement method for clients with defined needs to augment an existing project team for a specified period. Contracts often range in duration from 4 to 12 months and include the ability to extend the contract duration beyond the initial engagement period.

- **Contract-to-Hire** enables clients to engage and evaluate a consultant on a contract basis for a specific period of time after which the client may hire the consultant as a direct employee with no fee.

- **Direct Hire / Permanent Placement** enables clients to leverage our national recruiting competency to fill open IT positions with qualified permanent employees. This fee-based placement service can be engaged on a contingent or retainer basis and covers any level of position within your IT or business organization, including Project Managers, Business Analysts, Technical Staff, Executives, Managers or Directors.

Why Our Customers Recommend Us

The team at ConsultUSA assisted us with rapid staffing for a highly critical project, going from a staff of five to over 70 within six months. The organization delivered consistently good quality resources and the highest percentage of excellent quality resources I have seen. What makes ConsultUSA outstanding is the organization's focus on delivering value to the customer. They take ownership not only of finding the right resources, but of contributing to the success of the project. ConsultUSA delivers superior quality service."

- Application System Manager, PNC Bank

35-Hr Project Management Bootcamp

This 35-hour course enables you to learn how to successfully implement the principles and best practices of project management in your project environment. The comprehensive Bootcamp features 35 distinct project management topics, including 4 hours of education on Agile. Each 1-hour topic is followed by a 10-question review test to ensure knowledge comprehension. Important interpersonal skills needed by effective Project Managers, such as leadership and communication, are also covered. This course emphasizes the best practices outlined in the Project Management Institute's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) 6th Edition* and the *Agile Practice Guide*. Successfully completing this course will provide you with the knowledge and techniques needed to better understand Project Management, along with best practices that can be applied to projects right away.

Who Should Attend

Because this course emphasizes the principles and best practices outlined in the *PMBOK® Guide* and *Agile Practice Guide*, it will benefit anyone interested in furthering their career as a Project Manager, as well as anyone seeking a better understanding of project management standards and techniques.

Course Objectives

Upon completion of this course, you will:

- Demonstrate an understanding of PMI principles, best practices and techniques as outlined in the *PMBOK® Guide* and *Agile Practice Guide 6th Edition*
- Learn about the interpersonal skills necessary to become an effective Project Manager

Course Topics

- Intro to the PM Profession
- Project Management Definitions
- Organizational Influences on Projects
- Project Life Cycle Models
- Project Management Processes & Knowledge Areas
- Interpersonal Skills for Project Managers
- Project Leadership
- Launching a Project
- Dealing with Project Stakeholders
- Determining Project Requirements
- Defining the Project Scope
- Defining & Sequencing Project Activities
- Estimating Duration & Resources
- Developing the Project Schedule
- Controlling the Project Schedule
- Estimating & Budgeting Costs
- Controlling Cost with Earned Value
- Project Quality Processes
- Key Quality Tools
- Human Resource Processes
- Motivational Theories
- Communications Processes
- Effective Project Communications
- Identify Project Risks
- Analyze Project Risks
- Plan Risk Responses & Control Risks
- Procurement Processes
- Contract Types & Terminology
- Pulling the Project Plan Together
- Managing & Controlling Project Work
- Closing the Project
- Agile Introduction
- User Stories and Estimation
- Using Scrum
- Tailoring Agile

Duration: 35 Hours
Earn: 35 PDUs

35-Hr PMP® Examination Preparation

This 35-hour live instructor-led course created by the Project Management Institute (PMI)® is designed to advance your project management skills and prepare the exam candidate to take the Project Management Professional (PMP)® certification exam. This exam material focuses on situational project management and the principles and philosophy of the profession. It contains modules that immerse you in real-world scenarios, representing various industries and project management situations to help you practice applying principles and concepts at work. This course will focus your existing Project Management knowledge and prepare you for the content you will encounter on the PMP® exam. The course includes supplementary learning material and hands-on exercises from PMCentersUSA to reinforce practical project management/agile knowledge and support the information provided in PMI's curriculum.

Who Should Attend

This course will benefit PMP® exam candidates, mid-level Project Managers, those who want or need training requirements to become PMP certified, as well as those who want to build up their knowledge in Agile and Hybrid project approaches.

Course Objectives

Upon completion of this course, you will:

- Understand the nature of the PMP® exam and PMP certification
- Appreciate and augment on the scope of knowledge covered by the exam
- Prioritize study targets in preparation to write the exam

Course Outline

Class Introduction & Course Overview

Module 1: Creating a High-Performing Team

- Build a Team
- Define Team Ground Rules
- Negotiate Project Agreements
- Engage and Support Virtual Teams
- Build Shared Understanding About a Project

Module 2: Starting the Project

- Determine Appropriate Project Methodology/ Methods and Practices
- Plan and Manage Scope
- Plan and Manage Budget and Resources
- Plan and Manage Schedule
- Plan and Manage Quality of Products and Deliverables
- Integrate Project Planning Activities
- Plan and Manage Procurement
- Establish Project Governance Structure
- Plan and Manage Project Phase/Closure

Module 3: Doing the Work

- Assess and Manage Risks
- Execute Project to Deliver Business Value
- Manage Communications
- Engage Stakeholders
- Create Project Artifacts
- Manage Project Changes
- Manage Project Issues
- Ensure Knowledge Transfer for Continuity

Module 4: Keeping the Team on Track

- Lead a Team
- Support Team Performance
- Address and Remove Impediments and Obstacles, and Blockers
- Manage Conflict
- Collaborate with and Mentor Stakeholders
- Apply Emotional Intelligence to Promote Team Performance

Module 5: Keeping the Business in Mind

- Manage Compliance Requirements
- Evaluate and Deliver Project Benefits and Value
- Evaluate and Address Internal and External Business Environment Changes
- Support Organizational Change
- Employ Continuous Process Improvement

Supplementary Module

- Using Earned Value
- Critical Path Scheduling
- Practical Risk Management
- Costing and Budgeting on Projects
- Agile in the Real World
- Modern Leadership

Duration: 35 Hours
Earn: 35 PDUs

14-Hr Project Management Overview

This 14-hour course provides an extensive look at the fundamentals of project management. This course starts with an overview of project management key definitions, knowledge areas, project life cycle models, and project processes. Best practices initiating a project will be discussed including, the importance of meeting business objectives and identifying all project stakeholders. The case study provides attendees with practice preparing key project documents such as; project charter, stakeholder register, work breakdown structure, project schedule, risk register, and communications plan. This course covers Critical Path Method analysis including how to define project tasks, establish dependencies and durations, and identify the critical path. Attendees will also learn how to identify, analyze, and manage project risks. Other topics covered include resolving project change requests and dealing with unexpected risk events. The best practices covered in this course will prepare you to implement project management on your projects. This course also includes coverage of the Agile information provided by the Project Management Institute in the *Agile Practice Guide*.

Who Should Attend

This course will benefit project managers with limited experience, project team members, executives, functional managers, and any individuals involved with the planning, implementation, and control of projects.

Course Objectives

This practical course emphasizes project management best practices within the organizational, cultural, and economic environment of today's business world. Through instruction, dialog and real-world examples and exercises, attendees will be able to:

- Prepare a Project Charter
- Conduct a stakeholder analysis
- Create a work breakdown structure
- Develop a project schedule
- Create a risk register
- Prepare a communications plan
- Manage project changes and risk events
- Integrate the basic functions of project management throughout a project life cycle

Course Outline

Project Management Fundamentals

- Value in Project Management
- Key Definitions
- Project Management Knowledge Areas
- Life Cycle Models and Processes
- Organizational Structures for Projects
- Role of the Project Manager

Initiating the Project

- Understanding Business Objectives
- Preparing the Project Charter
- Exercise: Prepare Project Charter
- Stakeholder Identification & Analysis
- Exercise: Identify & Analyze Stakeholders

Planning the Project

- The Planning Process
- Project Requirements
- Exercise: Define Case Study Requirements
- Scope Definition Using a Work Breakdown Structure
- Exercise: Develop WBS
- Schedule Development Using Critical Path Method
- Exercise: Prepare Project Schedule
- Cost Estimating & Budgeting
- Managing Project Risks
- Exercise: Prepare Risk Register
- Importance of Project Communications
- Exercise: Prepare Communications Plan

Executing, Monitoring, and Controlling the Project

- Tracking Project Performance
- Managing Change Requests
- Exercise: Decide on Change Requests
- Risk Monitoring & Control
- Exercise: Manage Risk Events

Closing the Project

- Project Closing and Acceptance
- Archives and Lessons Learned

Agile Practices

- Introduction to Agile
- Life Cycles
- The Agile Environment
- Doing Agile
- The Organization and Agile

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Project Leadership

Project managers typically have high responsibility, but low authority for project team members from various functional groups. Despite this matrix environment, the expectation for project managers is to obtain top performance from the project team and deliver successful projects. This is only possible by use of effective project leadership. This intensive 2-day course covers the leadership role of the project manager, including the use of situational leadership. Attendees will learn leadership strategies for managing change and developing project teams. In addition, students will take assessments to determine both their preferred leadership and personality styles. Attendees will learn how to identify the personality styles of stakeholders, along with techniques for effective interactions with each personality type. Other leadership topics covered in this course include developing the project team, managing change, dealing with conflicts, and conducting project negotiations. This course will help attendees become more effective project leaders.

Who Should Attend

This course will benefit anybody in a leadership role on projects, such as project managers, project leaders, technical leads, and even project sponsors.

Course Objectives

This course emphasizes the fundamentals of leadership, management and communications techniques within the project environment. Upon completion of this course, participants will be able to:

- Build high-performance project teams using situational leadership and effective communications
- Interact effectively with project stakeholders based on their personality style by use of style flex
- Resolve conflict situations using five different approaches
- Conduct negotiations using a four-step process to attain beneficial project agreements

Course Outline

Project Leadership in Today's Culture

- The Role of Projects and Project Managers
- Leadership Qualities, Skills & Styles
- Situational Leadership
- Managing Change
- Exercise: Leadership Behavioral Analysis

Project Team Development

- Stages of Team Development
- Situational Leadership in Teams
- Team Leader Action Strategies
- Team Members Behaviors
- Exercise: Project Planning Situation

Maximizing Interpersonal Relationships

- Components of Emotional Intelligence
- History of Personality Style Models
- 4-Quadrant Personality Model
- Recognizing & Interacting with Different Styles
- Personality Styles Reaction to Stress
- Steps to Effective Team Communications
- Exercise: DiSC® Classic Personal Profile

Negotiating Solutions

- Conflict Sources for Project Teams
- Identifying & Managing Conflict
- Sources of Power
- Negotiating 4-Stage Process
- Exercise: Project Team Negotiation

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Project Scope and Quality Management

There is a lot of synergy between scope and quality on projects. Both are concerned with making sure the project includes just the work needed to complete the project successfully, along with ensuring the project satisfies the needs for which it is undertaken. This two-day course covers proven techniques for the management of scope and quality on projects. The importance of project requirements, types of requirements, and techniques for determining and prioritizing requirements will be discussed. The use of the work breakdown structure for documenting scope will be explained, along with how to validate and control scope. The key elements of project quality will be reviewed, along with practical examples in the use of the seven basic quality tools on projects.

This course will also cover the importance of integrating the project management processes and activities on a project. The use of a project charter to launch a project and the elements of the project management plan will be explained. Managing, monitoring and controlling project work, along with dealing with project changes will be reviewed. The final course topic is a review of the code of ethics and professional conduct for project managers. This course will help attendees manage scope and quality on projects, along with integrating all project elements effectively to help achieve project success.

Who Should Attend

This course will benefit project managers, project team members, functional managers, owners, contractors, suppliers and support personnel involved with managing scope and/or quality on projects.

Course Objectives

Upon completion of this course, the participants will be able to:

- Develop a project charter and project management plan
- Use a work breakdown structure to define scope
- Control the project scope and avoid scope creep
- Develop a plan to manage project quality
- Understand how to apply the basic quality tools
- Understand the code of professional responsibility and ethics for project management

Course Outline

Project Integration Management

- Key Concepts for Integration Management
- Use of the Project Charter
- The Project Management Plan
- Directing & Managing the Project Work
- Managing Project Knowledge
- Monitoring & Controlling Project Work
- Managing & Resolving Project Changes
- Closing the Project Successfully

Project Scope Management

- Key Concepts for Scope Management
- Planning for Scope Management
- Collecting Project Requirements
- Defining the Project Scope
- Creating the WBS
- Validating and Controlling Project Scope

Project Quality Management

- Key Concepts for Quality Management
- Planning for Project Quality
- Managing & Controlling Quality on a Project
- The Seven Basic Quality Tools
- Additional Quality Tools & Concepts

Professional Responsibility

- Ethics Defined
- Four Key Code of Ethic Values
- Ethics in Project Management
- Other Keys for Professional Growth

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Project Schedule and Cost Management

The project schedule and budget are key elements of the project management plan. Successful project completion is unlikely unless a complete and correct schedule and budget are developed and then managed during project execution. This 2-day course covers how to decompose the Work Breakdown Structure into activities, along with methods for estimating resource requirements and tasks duration. Attendees will learn how to sequence project tasks to develop the project network diagram and conduct critical path method analysis to determine the project completion date and critical path. This course will also cover resource planning, estimating techniques and the steps for project budget development. Also discussed are methods to control the project schedule and budget and forecasting the final project cost and completion date using earned value and earned schedule. This course teaches attendees the processes and techniques necessary for schedule and cost management to ensure timely completion of projects within the approved budget.

Who Should Attend

This course will benefit project managers, project team members, functional managers, owners, contractors, and suppliers involved with preparing and controlling the project schedule, estimate, and budget.

Course Objectives

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

- Define and sequence project tasks using the precedence diagramming method
- Estimate resources, duration, and cost for project tasks
- Develop a project schedule using the Critical Path Method (CPM)
- Develop a time-phased project budget
- Determine project status and forecast project performance using earned value and earned schedule

Course Outline

Defining & Sequencing Project Activities

- Schedule Management Basic Concepts
- Define Activities
- Sequence Activities using Task Relationships

Resource-Duration Estimating & Schedule Development

- Estimate Activity Resources
- Estimate Activity Durations
- Schedule Development Methodologies
- Schedule Display Types
- Critical Path Method Calculations

Estimating & Budgeting Project Costs

- Introduction to Cost Management
- Methods for Estimating Cost
- Develop Cost Contingency
- Determine Project Budget

Controlling Cost and Schedule

- Elements of Schedule & Cost Control
- Progressing Techniques
- Variance Analysis
- Earned Value Management
- Forecasting Project Costs
- Earned Schedule
- Present Value Analysis

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Project Risk and Procurement Management

Projects are done in an uncertain and changing environment, which results in numerous potential risks. In addition, many organizations outsource project work, which creates another entire category of possible risks. Project managers and teams must work effectively with purchasing professionals, vendors and suppliers to accomplish project objectives. Successful management of project risks and procurements help project teams avoid surprises and increases the chances of project success. This intensive 14-hour course encompasses the fundamentals and best practices of risk and contract/ procurement management for projects. Effective techniques for identifying, analyzing and planning risk responses will be discussed. Contract terminology, selection criteria, key elements of a contract and best practices for successfully negotiating with vendors will be reviewed. This course has numerous exercises so attendees can practice applying the course concepts to an actual project.

Who Should Attend

This course will benefit project managers and team members, functional managers, owners, contractors and other personnel involved risk and procurement management on projects.

Course Objectives

Upon completion of this course, the participants will be able to:

- Describe the characteristics and types of risks
- Identify project risks using cause-risk event-impact
- Analyze and prioritize project risks
- Prepare risk response & contingency plans
- Describe the procurement processes
- Select the most appropriate contact type for a specific procurement
- Prepare a request for procurement document
- Conduct a contract negotiation

Course Outline

Project Risk Management

- Risk Characteristics
- Risk Management Processes
- Risk Management Plan Contents
- Causes-Risk Event-Impacts Method
- Information Gathering Techniques
- Diagramming Techniques
- Project Risk Analysis Model (PRAM)
- Qualitative & Quantitative Risk Analysis
- Plan & Implement Risk Responses
- Contingency & Reserves
- Reporting Risk Status
- Techniques for Monitoring Risks

Procurement Management Processes

- Common Terminology
- Buyer's versus Seller's Perspective
- Procurement Management Processes
- Contract Types
- Procurement Management Plan Contents
- Use of Selection Criteria
- Types of Contract Negotiations
- Negotiation Stages

Contract Terms & Categories

- Types of Procurement Documents
- Request for Proposal Elements
- Contract Classifications
- Contract Elements
- Contract Terminology
- Contract Interpretation Guidelines
- Typical Bonds Used on Contracts
- Contract Types Variations
- Selection of the Correct Contract Type

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Management of Resources, Stakeholders & Communications

This course encompasses the best practices for organizing, managing, and communicating with the project team and stakeholders. The 2-day course reviews the processes for Resource, Stakeholder and Communications Management from the PMBOK® Guide Sixth Edition, including inputs, key tools and techniques, and outputs. Estimating, acquiring and managing project resources will be discussed, including use of a team charter, motivation and conflict resolution techniques, and methods for developing a high-performance team. Effective techniques for identifying and analyzing project stakeholders will be reviewed, along with how to manage stakeholder expectations. The importance of effective communications will be explained along with trends and barriers. Attendees will participate in multiple group exercises to practice applying course concepts to a case study. This course provides proven techniques for the management of resources, stakeholders and communications to achieve project success.

Who Should Attend

This course will benefit project managers, project team members, functional managers and supervisors, owners, contractors, suppliers and support personnel involved with project stakeholders, project resources and/or project communications.

Course Objectives

This course provides best practices for the management of project resources, communications and stakeholders on a project. Upon completion of this course, participants will be able to:

- Prepare a team charter to establish team expectations
- Build a high-performance team using motivation theories
- Manage project conflicts
- Identify and analyze project stakeholders
- Manage stakeholder expectations
- Prepare a communications plan for a project
- Utilize effective communication methods with stakeholders
- Work successfully with virtual teams

Course Outline

Establishing the Project Team

- Types of Project Organization Structures
- Estimating Project Resource Needs
- Acquiring Project Resources
- Use of the Team Charter for Team Building
- Documenting Project Roles & Responsibilities

Developing & Managing the Project Team

- Developing a High-Performance Project Team
- Methods for Motivating the Team
- Managing Project Conflicts

Stakeholder Management

- Types of Project Stakeholders
- Identifying and Analyzing Stakeholders
- Tools for Managing Stakeholder Engagement
- Monitoring Stakeholder Relationships

Communications Management

- Planning for Project Communications
- Common Communication Barriers
- Project Communication Methods
- Use of Work Performance Reports
- Project Management Information Systems

Effective Communications

- The Importance of Project Communications
- Communication Channels and Links
- Guidelines for Verbal and Written Communications
- Listening: a Critical Project Manager Skill
- Effective Use of Email
- Improving Project Meetings Productivity
- Working with Virtual Teams

Course Exercises:

- Creating a Team Charter
- Project Management Best & Worst Practices
- Motivation Through Needs
- Increasing Project Commitment
- Identifying & Analyzing Project Stakeholders
- Dealing with a Communications Breakdown
- Providing Effective Verbal Instructions
- Developing a Communications Plan
- Preparing a Stakeholders Communication

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Managing Multiple Projects

Normally the study of project management focuses on managing a single project. In reality, most project managers and practitioners are involved with multiple projects in today's business environment. Most available material on managing programs of multiple projects focuses on time management and priority setting. These are vital skills; however, they are not the only skills needed to effectively manage multiple projects. There are strategies for multiple projects that go beyond time management and priority setting. These strategies entail adapting the normal single project management skills to the multiple project/program environment. This 14-hour course will identify and explore these strategies and provide tools, techniques, and methodologies to effectively deal with and manage multiple projects.

Who Should Attend

This course should be attended by project managers, team members, and any individual involved with managing multiple projects. This course assumes that attendees have a solid understanding of and competency in the generally accepted best practices of project management.

Course Objectives

This practical course emphasizes the fundamentals of managing multiple projects in conjunction with the generally accepted best practices of project management adapted to encompass the aspects of portfolio and program management. Through instruction, dialog and practical examples and exercises, upon completion of this course you will be able to:

- Identify the differences between managing single and multiple projects
- Implement multi-tasking & linking for concurrent projects
- Select, prioritize and staff project portfolios
- Implement effective monitoring processes for multiple projects
- Resolve multiple project conflicts
- Establish & use multiple projects control & reporting
- Understand the political role of the manager of multiple projects

Course Outline

Knowledge Pertinent to Multiple Project Management

- The organization
- Leaders and sponsors
- Promised results
- Team Members
- Projects

Planning Multiple Projects

- Requirements and constraints
- What to plan first
- Work planning
- Other considerations

Monitoring Multiple Projects

- Establishing the baseline
- Practical reporting systems
- Dealing with changes
- Risk management

Responding to Multiple Projects

- Reaction without over-reacting
- Keeping programs online
- The political side

Closing Multiple Projects

- Closing each project
- Maintaining momentum

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Microsoft® Project Workshop

Project management skills are taught and used independently from any tool, but at some point, all organizations need to standardize on and make use of some kind of project management tool – a spreadsheet is not enough. Microsoft Project is one of the most widely-used such tools, and this workshop will present the attendees with an opportunity to use the tool to go through a series of exercises, based on a real-world case study.

This is a workshop rather than a course, so instead of focusing on lectures and PowerPoint slides, the attendees will be introduced to a project and will go through the steps in setting up and managing that project, using Microsoft Project. The version of the tool in use does not matter – the facilitator will make use of the version current at your organization.

Who Should Attend

This course is intended for Program Managers, Project Managers, IT Managers, Business Analysts and anyone else looking to improve their skills with Microsoft Project, a widely-used project management tool.

Course Objectives

This 7-hour workshop will focus on a specific case study. The facilitator will guide you through a series of exercises highlighting the use of Microsoft Project in the real world. Upon completion of this one-day course, participants will be able to:

- Perform initial setup of a project
- Build a Work Breakdown Structure in MSP
- Create a schedule in MSP
- Manage resources in MSP
- Manage the budget in MSP
- Progress a project
- Track and monitor a project

Course Outline

The Case Study

- The project
- Roles
- Initial parameters

Understanding the Deliverables

- Scope determination
- The WBS

Starting the Schedule

- Activity list
- Dependencies

Resource Management

- Determining the People Needed
- Estimates
- Material resources

Costs and the Budget

- Costing the Resources
- Applying Resources to Activities
- Resource Levelling
- The Final Schedul

Tracking Actuals

- Baselines
- Adding Actuals
- Earned Value

Variance Management

- Reasons for Variance
- Approaches for Variance Management
- Change Control
- Replanning

Duration: 14 Hours
Earn: 14 PDUs

7-Hr Introduction to Project Management

This 7-hour course provides a brief overview on the fundamentals of project management by following a case study from project initiation to completion. The case study provides attendees the opportunity to prepare key project management documents including a project charter, work breakdown structure, schedule and risk register. This course will start with a discussion on key project management definitions, knowledge areas, life cycle models and processes. Best practices for launching a project, preparing a project plan and managing changes will be reviewed. The best practices covered in this course will help you successfully apply project management to projects.

Who Should Attend

This course is designed for people new to project management. This includes newly appointed project managers; project team members, clients and management who want to understand how to successfully apply project management to projects.

Course Objectives

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

- Explain the basic elements of project management
- Prepare a project charter
- Create a work breakdown structure for a project
- Develop a simple bar chart project schedule
- Prepare a risk register for a project
- Manage project changes

Course Outline

Module 1: Project Management Fundamentals

- Growth of Project Management
- Key Project Management Definitions
- Project Management Knowledge Areas
- Project Life Cycle Models
- Project Processes
- Role of the Project Manager

Module 2: Project Initiation

- Project Charter
- Stakeholders Identification
- Exercise 1: Identify and Analyze Stakeholders

Module 3: Planning the Project

- Work Breakdown Structure
- Exercise 2: Prepare WBS
- Schedule Development
- Exercise 3: Prepare Project Bar Chart Schedule
- Project Risk Management
- Exercise 4: Prepare Risk Register
- Project Communications

Module 4: Managing & Closing the Project

- Tracking Project Performance
- Integrated Change Control
- Discussion: Decide on Change Orders Resolution
- Monitoring Project Risks
- Project Closeout and Acceptance

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Defining Project Scope

This 7-hour course will cover the importance of defining project requirements and scope along with integrating all project elements into a concise plan that can be managed and controlled. The Integration and Scope Management processes from the PMBOK® Guide will be reviewed including inputs, key tools and techniques, and outputs. The value of the Project Charter will be explained along with the typical components included in the document. Types of project requirements will be reviewed, plus common methods for eliciting requirements. Defining project scope with a Work Breakdown Structure (WBS) will be described including structure and number of WBS levels based on project size. The typical components of the Project Management Plan will be reviewed. Change management will be a major topic discussed including types of change, the change process and templates, and challenges in using change management. This course includes multiple exercises to allow attendees to practice the course concepts. The proven best practices covered in this course will prepare you to immediately start implementing proven techniques for defining and managing the scope of your projects.

Who Should Attend

This course will help program and project managers; business analysts, and project team members improve their ability to define the project scope and integrate all project elements into an efficient plan.

Course Objectives

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

- Prepare a Project Charter
- Develop a list of requirements for a project
- Define the project scope using a WBS
- Prepare a Project Management Plan
- Utilize a change management process
- Explain the typical closeout items on a project

Course Outline

Module 1: Project Integration Management

- Introduction to Integration Management
- Develop Project Charter
- Develop Project Management Plan
- Direct & Manage Project Work
- Manage Project Knowledge
- Monitor & Control Project Work
- Perform Integrated Change Control
- Close Project or Phase

Exercises

- *Determine Success Criteria*
- *Prepare Project Charter*
- *Prepare Change Plan*

Module 2: Project Scope Management

- Introduction to Scope Management
- Plan Scope Management
- Collect Requirements
- Define Scope
- Create WBS
- Validate Scope
- Control Scope

Exercises

- *Determine Project Requirements*
- *Build Project WBS*

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Managing Multiple Projects

The study of project management normally focuses on managing a single project, but in reality most project managers are involved with multiple projects. This course will discuss strategies, tools and techniques to successfully manage multiple projects.

Key elements of the multiple projects environment will be reviewed, such as organizational considerations, expectations management and setting priorities. The importance of managing your time will be stressed including delegating work and learning to say 'no'. This course will discuss best practices when planning multiple projects, such as identifying stakeholders, eliciting requirements, defining project scope, establishing the schedule and budget, and finalizing the project plan. Tips for executing and monitoring work on multiple projects will be reviewed such as handling changes and risks. The final topic is the key interpersonal skills needed by project managers to survive in the multiple projects environment.

Who Should Attend

This course will benefit project managers, team members, and any individual involved with managing multiple projects. Course attendees should have knowledge and experience in using the generally accepted best practices of project management.

Course Objectives

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

- Set priorities on multiple projects
- Manage your time by delegating work
- Prepare and maintain a listing of stakeholders
- Develop concise and 'fit-for-use' project plans
- Effectively monitor work on multiple projects
- Manage changes and risks across multiple projects
- Respond to conflict and crisis on multiple projects
- Understand the importance of interpersonal skills when managing multiple projects

Course Outline

Module 1: Basics

- Types of Multiple Projects
- Project Environment
- Project Establishment

Module 2: Planning (1)

- Exercise 1
- Plan - Requirements
- Plan - Scope Definition

Module 3: Planning (2)

- Plan - Resources
- Plan - Schedule
- Plan - Other Elements

Module 4: Execute & Monitor Work

- Exercise 2
- Execution
- Monitor
- Reporting

Module 5: Control

- Manage Expectations
- Control Risk
- Control Change
- Exercise 3

Module 6: Crisis Management & Closing

- Crisis and Conflict Management
- Project Closing
- Wrap Up and Evaluation

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Managing Problem Projects

Most Project Managers eventually have a "problem" project in danger of not meeting project success criteria. This course will show you how to identify project problems, and implement recovery techniques to turn a project around for successful completion. This course will start with an explanation of the characteristics of simple, complex and wicked problems, along with common sources of problems. How to identify problem project symptoms at the start, during execution and near project completion will be discussed.

A five-step systematic approach for resolving project problems will be explained including how to identify, understand, assess and analyze the problem. Methods for developing alternatives will be explained along with solution selection and implementation. This course will also introduce creative approaches for problem project resolution, provide suggestions on how to prevent problem projects, and explain how to stop a 'doomed' project.

Who Should Attend

This course will benefit project managers and all individuals involved with the assessment and turnaround of problem projects. This course assumes that attendees have a solid understanding of and competency in the generally accepted best practices of project management.

Course Objectives

This practical course emphasizes the fundamentals of identification, assessment and recovery of problem projects. Through instruction, dialog and practical examples and exercises, upon completion of this course you will be able to:

- Describe characteristics of simple vs. complex problems
- Recognize common problem sources and the symptoms of problem projects
- Determine the root cause of a problem
- Use Systematic and Creative Problem Resolution Techniques
- Follow the requisite steps to stop and/or cancel a problem project

Course Outline

Key Things to Know About Problem Projects

- Key Definitions & Process
- Problem Project Symptoms
- Defining the Problem Project Type
- Problem Solving Strategies

Systematic Approach to Resolution

- Problem Project Identification & Understanding
- Problem Project Assessment and Analyzing
- Solution Selection & Implementation

Creative Approach to Resolution

- LOGPAD Technique
- Joint Application Design (JAD)
- Dialogue Mapping

Prevent-Cure-Terminate

- Problem Project Prevention Do's and Don'ts
- Turning Around Problem Projects
- Stopping a Doomed Project

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Managing Project Resources

This course covers best practices for organizing and managing the project team. The Project Human Resource Management processes from the PMBOK® Guide will be reviewed including inputs, key tools and techniques, and outputs. The advantages and disadvantages of different project organization structures will be explained. Popular motivation theories will be reviewed, along with how to apply these theories to project teams. Techniques for influencing project team member selection will be presented, along with the use of a team charter for ensuring team alignment. This course will also cover best practices for developing a high performance team. Other topics covered in this course are situational leadership and conflict management. This course includes multiple exercises to allow attendees to practice the course concepts.

Who Should Attend

This course will help Portfolio, Program and Project Managers and Business Analysts working with project team members.

Course Objectives

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

- Describe the pros and cons of project team structures
- Explain how motivation theories can be applied to project teams
- Prepare a team charter
- Build a high performance team
- Manage conflict

Course Outline

Establishing the Project Team

- Projects and Human Resource Needs
- Human Resource Tasks for the Project Manager
- Human Resources Management Processes
- Project Role and Responsibilities
- HR Practice Considerations
- Organizational Structures
  - Functional
  - Projectized
  - Matrix (Strong, Weak, Balanced)
- Making Matrix Projects Work
- Influencing Team Member Selection
- Setting Team Expectations using a Team Charter
- Creating a Project Culture

Developing & Managing the Project Team

- Dynamic of team development
- Content Motivation Theories (Maslow. McClelland, Herzberg)
- Process Motivation Theories (Theory X, Y, and Z; Contingency, Goal-Setting, Expectancy, Reinforcement, Equity)
- Application of Motivated Team
- Factors that Lead to a Motivated Team
- Creating a High Performance Team
- Managing Resources with Situational Leadership
- Managing Conflict

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Best Practices for Managing Project Risk

How often are your projects impacted by unanticipated events? Are you constantly 'putting out fires' on your projects? Become proactive rather than reactive by learning best practices for risk identification, risk analysis and risk response planning. This 7-hour course will cover the elements of a successful risk management plan. Effective methods for identifying risks will be discussed. Risk analysis tools and techniques will be presented. Successful planning methods for responding to potential risk events will be reviewed. Application of risk management to project budgets, schedules and contracting strategies will be described using specific examples. This course is interactive, with exercises and sample problems to allow attendees to practice the tools and techniques presented during the course. Attend this course and become a skilled manager of the opportunities and threats on your projects.

Who Should Attend

This course will benefit project managers, project team members, functional managers, and individuals involved with the planning, implementation and control of projects and looking to become more proficient in managing risks.

Course Objectives

This practical course emphasizes the fundamentals of effective risk management. Upon completion of this course, you will be able to:

- Describe risk management terminology and processes
- Explain the elements of a good risk management plan
- Utilize the cause-risk-impact method for identifying risks
- Prioritize risks based on probability and impact ratings
- Describe quantitative techniques for analyzing risks
- Develop risk response plans
- Use risk analysis techniques to determine project contingencies

Course Outline

Module 1: Risk Management Overview

- The Nature of Risk
- Risk Characteristics
- Risk Management Processes
- Plan Risk Management Process

Module 2: Identify Risks

- Identify Risks Process
- Causes-Risk Event-Impacts Method
- Data Gathering Techniques
- Data Analysis Techniques
- Exercise: Identify Project Risks

Module 3: Project Risk Analysis

- Project Risk Analysis Model (PRAM)
- Perform Qualitative Risk Analysis Process
- Perform Quantitative Risk Analysis Process
- Exercise: Conduct PRAM Analysis
- Exercise: Analyze Project Risk

Module 4: Plan and Implement Risk Responses, Monitor Risk

- Plan Risk Responses Process
- Implement Risk Responses Process
- Monitor Risks Process
- Exercise: Prepare Risk Response Plan
- Exercise: Unexpected Risk Event

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Implementing Project Procurement

This course will cover the principles of procurement management, which is acquiring products and services needed for the project from outside the project team. The Procurement Management processes from the *PMBOK® Guide 6th Edition* will be reviewed including inputs, key tools and techniques, and outputs. Typical procurement activities will be described from the make-or-buy decision to contract award to contract closure. The key elements that should be included in a procurement management plan will be presented. The stages of a contract negotiation will also be reviewed. This course will review key contract terminology, selection criteria and the key elements of a contract. The types of contracts that can be used will be reviewed including variations of fixed price, cost reimbursable and time & material. Selecting the correct contract type and dealing with contract risks will also be covered. This course includes multiple exercises to allow attendees to practice the course concepts.

Who Should Attend

This course will help Portfolio, Program and Project Managers, Business Analysts, functional managers, and other project team members involved with contracting project work.

Course Objectives

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

- Describe the procurement processes
- Select the most appropriate contract type for a specific procurement
- Prepare a request for procurement document
- Conduct a contract negotiation

Course Outline

Module 1: Procurement Management Processes

- Commonly used Terminology
- Buyer's versus Seller's Perspective
- Procurement Management Processes
- Contract Types
- Procurement Management Plan Contents
- Use of Selection Criteria
- Types of Contract Negotiations
- Negotiation Preparation by Buyer and Seller
- Rapport, Exploratory and Bargaining Stages
- Closing the Deal

Module 2: Contract Terms & Categories

- Types of Procurement Documents
- Essential Request for Proposal Elements
- Contract Classifications
- Contract Elements
- Contract Terminology
- Contract Interpretation Guidelines
- Typical Bonds used on Contracts
- Variations on Contract Types (Fixed Price, Cost Reimbursable, Time & Material)
- Selection of the Correct Contract Type
- Contract Risk Management

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Best Practices for Managing Project Quality

This course will cover project quality management, which are the activities done to ensure the project will satisfy the needs for which it was undertaken. The Quality Management processes from the *PMBOK® Guide* will be presented including inputs, key tools and techniques, and outputs. The definition of quality will be reviewed along with key terms such as grade versus quality, and precision versus accuracy. The evolution in quality thinking over the last 100 years will be explained. The cost of quality will be described including the cost of conformance and nonconformance. The five key elements of a quality policy will be reviewed. The difference between quality assurance and quality control will be presented, including the ownership for quality. A major focus of this course will be the seven basic quality tools, with an emphasis on how to apply these quality tools to projects. This course includes examples of project quality tools and exercises using the most common quality tools.

Who Should Attend

This course will help Portfolio, Program and Project Managers, Business Analysts, functional managers, and other project team members responsible for managing quality on projects.

Course Objectives

Upon completion of this course, the participants will be able to:

- Explain the definition of quality
- Describe the quality management processes
- Explain the key element of a quality policy
- Describe the difference between quality assurance and quality control
- Develop a quality plan for a project
- Use the seven basic quality tools

Course Outline

Module 1: Project Quality Management

- Introduction to Quality Management
- Plan Quality Management
- Manage Quality
- Control Quality
- Seven Basic Quality Tools
- Additional Quality Tools and Concepts

Exercises

- Stakeholder Quality Requirements
- Quality Standards
- Using a Cause-and-Effect Diagram
- Prepare Quality Management Plan

Module 2: Professional and Ethical Behavior

- Ethics Defined
- Four Key Code of Ethics Values
- Other Keys for Professional Growth

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Project Communication

Project Managers spend most of their time using verbal communication as well as formal and informal written communication, and effective communication with project stakeholders is a vital element for project success. Unfortunately, successful communication is suffering in today's fast-paced work environment, and the bad connections are more than a mere inconvenience. Poor communication can impact morale, erode productivity and lead to project failure. The problem is becoming even worst due to the increased use of virtual teams.

This one-day course will help attendees become more effective in transmitting and receiving project information, especially when working with virtual teams. Attendees will learn how to plan and manage project communications, along with techniques for improving communication skills. In addition, best practices for working with virtual teams will be covered. Class participants will also take part in exercises to improve communication skills.

Who Should Attend

This course is intended for Program Managers, Project Managers, IT Managers, Business Analysts and anyone else looking to improve their communication skills with Project Teams and stakeholders.

Course Objectives

This one-day course will cover the critical skills needed for improving the flow of information on projects. This course includes practical communication exercises including a listening skills evaluation. Upon completion of this one-day course, you will be able to:

- Utilize value-added communication techniques
- Conduct a stakeholder analysis
- Create an efficient communication plan
- Conduct a lessons learned session
- Run effective and efficient meetings
- Work effectively with virtual teams

Course Outline

Effective Communication Team Exercise

Communication Process

- Communication elements
- Problems and barriers
- Techniques for concise communication

Project Stakeholders

- Identification of project stakeholders
- Analysis of stakeholders' communication needs
- Management of stakeholders' expectations

Project Communication Plan

- Communication requirements
- Communication media and technology
- On-going management of project communications

Information Distribution

- Lessons Learned
- Performance & Status Reporting
- Issues and change logs
- Effective Meetings

Communication Skills

- Effective use of email
- Barriers to effective listening
- Listening assessment

Virtual Teams

- Reasons for virtual teams
- Barriers to effective virtual teams
- Techniques for making virtual teams work

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Controlling Project Costs

This 7-hour course will cover the fundamentals and best practices for project cost management including estimating, budgeting, financing, and controlling costs. The Cost Management processes from the *PMBOK® Guide* will be presented including inputs, key tools and techniques, and outputs. The types of estimates normally done on projects will be explained, along with the relationship of estimate accuracy to defined scope. Top-down early project estimating techniques will be reviewed including analogous and parametric methods. Bottom-up estimating using the project Work Breakdown Structure (WBS) and estimated resources will be covered. Construction of the cumulative cost curve will be reviewed, along with methods for determining contingency reserve. Proven methods for controlling costs will be explained, including variance and earned value analysis. Present value analysis, used to evaluate the project business case, will also be reviewed. This class includes exercises on estimating, budgeting and controlling project costs.

Who Should Attend

This course will help Program and Project Managers, Business Analysts, functional managers, and other project team members responsible for estimating and controlling project costs.

Course Objectives

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

- Describe the types of estimates used on projects
- Explain the relationship of estimate accuracy to scope
- Understand the formulas for financial analysis of a project business case
- Describe commonly used top-down estimating techniques
- Prepare a bottom-up project estimate including contingency
- Prepare a cumulative cost curve
- Analyze project performance using earned value

Course Outline

Module 1: Cost Management Overview

- Cost Management Definitions
- Cost Management Processes

Module 2: Estimating Techniques

- Client Expectations
- Top-down Estimating Techniques
- Resources Estimating
- Bottom-up Estimating

Module 3: Budget Preparation

- Contingency Definition & Purpose
- Methods for Determining Contingency
- Budget Build-up From Estimates

Module 4: Controlling Project Costs

- Cost Control Definitions
- Performance Measurement Techniques
- Cost Change Management

Module 5: Use of Earned Value Analysis

- Why Use Earned Value?
- Earned Value Terminology
- Progressing Techniques
- Earned Value Calculations
- Project Cost Forecasting

Module 6: Business Case Analysis

- Time Value of Money
- Financial Analysis Formulas
- Business Case Examples

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Intro to *PMBOK® Guide* 7th Edition

This 7-hour course will introduce the principles and philosophy of project management as presented by the Project Management Institute (PMI)® in *The Project Management Body of Knowledge (PMBOK® Guide) Seventh Edition*. PMI has significantly changed its approach to this important text, moving away from providing guidance on the techniques and best practices of project management to focus on high-level thinking. This new perspective will free project managers and their organizations to determine their own methods of managing projects based on many different factors. It should be noted that PMI still considers its *PMBOK® Guide Sixth Edition* to be valid, as it serves a different purpose.

This course will do a thorough review of the *PMBOK® Guide Seventh Edition*, specifically Project Performance Domains, Tailoring, and the use of Models, Methods, and Artifacts. We will also delve into the components of PMI's new text, *The Standard for Project Management*, including Value Delivery and Project Management Principles.

Who Should Attend

This course should be attended by anyone with an interest in understanding the changes in PMI's PMBOK® Guide Seventh Edition. It will benefit certified project managers who want to stay current with these changes, as well as those new to project management, and project managers just beginning their relationship with PMI.

Course Objectives

Upon completion of this 1-day course, participants will understand:

- The various project performance domains
- Project approaches such as Agile, Predictive and Hybrid
- The meaning and application of tailoring to your organization's project approach
- Commonly used models, methods and artifacts
- Value delivery and oversight
- Project management principles
- Work effectively with virtual teams

Course Outline

Project Performance Domains

- Stakeholders
- Teams
- Development approach
- Planning performance
- Work performance
- Delivery
- Measurement
- Uncertainty
- Exercises: Research and Team

Tailoring

- Why tailor?
- Tailoring process
- Tailoring the performance domain
- Exercises: Research and Team

Models, Methods and Artifacts

- Commonly used models
- Methods
- Artifacts
- Exercises: Research and Team

Value Delivery

- Creating value
- Governance
- Project functions
- The project environment
- Exercises: Research and Team

Project Management Principles

- Stewardship
- Collaboration
- Stakeholder engagement
- Value Focus
- System interactions
- Leadership
- Tailoring
- Quality approach
- Complexity approach
- Risk response
- Adaptability and resilience
- Change
- Exercises: Research and Team

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Microsoft Project® Workshop

Project management skills are taught and used independently from any tool, but at some point, all organizations need to standardize on and make use of some kind of project management tool – a spreadsheet is not enough. Microsoft Project is one of the most widely-used such tools, and this workshop will present the attendees with an opportunity to use the tool to go through a series of exercises, based on a real-world case study.

This is a workshop rather than a course, so instead of focusing on lectures and PowerPoint slides, the attendees will be introduced to a project and will go through the steps in setting up and managing that project, using Microsoft Project. The version of the tool in use does not matter – the facilitator will make use of the version current at your organization.

Who Should Attend

This course is intended for Program Managers, Project Managers, IT Managers, Business Analysts and anyone else looking to improve their skills with Microsoft Project, a widely-used project management tool.

Course Objectives

This 7-hour workshop will focus on a specific case study. The facilitator will guide you through a series of exercises highlighting the use of Microsoft Project in the real world. Upon completion of this one-day course, you will be able to:

- Perform initial setup of a project
- Build a Work Breakdown Structure in MSP
- Create a schedule in MSP
- Manage resources in MSP
- Manage the budget in MSP
- Progress a project
- Track and monitor a project

Course Outline

The Case Study

- The project
- Roles
- Initial parameters

Understanding the Deliverables

- Scope determination
- The WBS

Starting the Schedule

- Activity list
- Dependencies

Resource Management

- Determining the People Needed
- Estimates
- Material resources

Costs and the Budget

- Costing the resources
- Applying Resources to Activities
- The Final Schedule

Tracking Actuals

- Baselines
- Adding Actuals

Variance Management

- Reasons for Variance
- Approaches for Variance Management
- Change Control
- Replanning

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Best Practices for Developing Project Schedules

What are the consequences to your project if the schedule is incorrect? How confident in the completion date would you be, given that most project schedules contain errors that greatly reduced the schedule accuracy? This 7-hour course covers the essential skills needed to create and maintain a correct project schedule that contains tasks and resources. Topics include a brief review of schedule types, typical formats, critical path method calculations and interpretation of float values. Scheduling best practices will be explained including correct use of task relationships, how to handle the uncertainty in task duration, check for network logic breaks, and correct use of constraints, summary tasks and contingency. Effective methods for adding resources to tasks, reporting progress, handling changes, and compressing the schedule will also be discussed. This course includes practical scheduling exercises and participants will have the option of doing the exercises on their computer.

Who Should Attend

This course is intended for project managers, IT managers, business analysts, and anybody else with some experience preparing schedules and who want to develop expertise in creating and modifying project schedules using scheduling software.

Course Objectives

This course covers the critical skills necessary to create and maintain a correct project schedule that contains tasks and resources. Upon completion of this course, you will be able to:

- Effectively use Precedence Diagramming and the Critical Path Method
- Describe and use the types of task relationships
- Explain the relationship between duration, work, and availability, and how picking the task type affects schedule calculations
- Use scheduling best practices to prepare a correct schedule
- Know how to resource load a schedule
- Check a schedule for mistakes
- Describe the procedure that should be followed when preparing a project schedule

Course Outline

Module 1: Defining and Sequencing Project Activities

- Schedule Management Basic Concepts
- Define Activities
- Sequence Activities
- Exercise: Prepare Network Diagram

Module 2: Resource-Duration Estimating and Schedule Development

- Estimate Activity Resources
- Estimate Activity Durations
- Schedule Development Methodologies
- Schedule Display Types
- Critical Path Method Calculations
- Exercise: Project Schedul - Network Analysis

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Project Management Fundamentals for Non-PMs

The purpose of this 7-hour course is to describe the methodologies of project management to non-PMs that are involved in projects, but do not hold the role of a project manager. Attendees of this course will learn techniques to assist with getting their job done, without learning a whole new profession.

Who Should Attend

This course is intended for people who are leading project teams but have no experience working as project managers.

Course Objectives

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

- Organize their work effectively
- Understand the nature and extent of the work
- Determine the schedule for the work
- Predict problems and solve them in advance
- Work effectively with clients and suppliers
- Communicate with all in an efficient manner

Course Outline

Why Bother Organizing Your Work?

- Why not just wing it?
- What does the organizer have to do?
- How will you answer this question: How are things going?

How to Start Organizing

- Who do you need to talk to?
- Who is going to do the work?
- What paperwork is needed to get things going?

What Work are you Going to Do?

- What outcome are you looking for?
- What individual things need to get done to achieve the outcome?
- What work needs to take place to get these things done?

How Long Will the Work Take?

- What order do those tasks have to take place in?
- How long will this take?
- Can some things be done at the same time?
- How do we put all that together onto a calendar?

How do we Make Sure the Work Meets the Standard?

- What does quality mean, anyway?
- How do we measure the results for quality?
- How do we talk about the quality?

Dealing with Clients and Suppliers

- Why does it have to be in writing?
- What different types of contracts are there?
- What do we do when things go off the rails?

How do we Identify Problems Before They Happen?

- Why bother identifying problems in advance?
- How do we find all these potential problems?
- Once we have a list, what do we do with it?

Communicating

- Why don't these people understand me?
- What can I do about difficult people?
- Who needs to know about this project?
- How do I make sure everyone knows what is going on?

Handling Issues

- How do I know when things are not going well?
- What do I do to fix these problems?
- What do I do when I can't fix these problems, and need to escalate higher?

Duration: 7 Hours
Earn: 7 PDUs

14-Hr Introduction to Agile

This 14-hr course covers the concepts, principles, and structure of Agile development and provides the fundamental knowledge needed for incorporating Agile techniques into your organization. The three primary roles of Product Owner, Scrum Master and Team Member on an Agile project will be reviewed, along with the differences between a traditional and an Agile team. The five levels of Agile planning will be explained, as will the use of user stories to define requirements. Other topics covered include the product backlog and Agile estimation techniques. Seven hands-on exercises are incorporated throughout the class, with significant time devoted to explaining the elements of scrum-- the most commonly used Agile methodology. The Scrum sprint framework will be reviewed, including the sprint planning meeting, daily scrum, sprint review and retrospective, along with key scrum artifacts such as the product and sprint backlogs, burn charts and the task board. Other Agile methods covered include Extreme Programming, Kanban, Lean, Dynamic Systems Development Method and Feature Driven Development. This course also presents information on how to build your Agile team, scale Agile to large projects and multiple teams, and integrate traditional processes with Agile. A final review test is also included as part of the course wrap-up.

Who Should Attend

This course is designed for those new to agile, in the early stages of agile adoption or curious about how to get started with an agile approach. Anyone from the IT Department or the Business area, from Management on down, would take value from this course as their organization moves to embrace Agile.

Course Objectives

Upon completion, participants will be able to:

- Explain the history of Agile and the Agile Manifesto
- Define the roles and responsibilities for the three primary roles on an agile project
- Describe the five levels of agile planning from vision down to daily scrum meetings
- Write user stories to define requirements
- Use Agile estimation methods to size user stories
- Describe Agile methodologies including Scrum, Extreme Programming, Kanban, Feature Driven Development, Lean Development and DSDM
- Build an Agile team
- Prepare scrum artifacts including the product and sprint backlogs, burn charts and the task board
- Apply metrics to Agile project

Course Outline

Introduction to Agile Concepts

- Simple vs. Complex Projects
- Exercise: The Elevator Description
- What is Agile?
- Manifesto for Agile
- Reducing Risk with Agile
- The Agile Project Team
- Levels of Agile Planning
- Exercise: Define User Roles

The Scrum Framework

- Done in Scrum
- Exercise: Requirements
- The Product Backlog
- User Stories
- Exercise: Write User Stories
- User Story Prioritization
- Agile Estimation Techniques
- Exercise: Prioritizing & Estimating
- Planning Ahead in Agile
- Scrum Sprints (planning, work, meetings, review, retrospectives, abnormal termination, testing)
- Exercise: Sprint Planning
- Tracking the Agile Project

Other Agile Techniques

- eXtreme Programming
- Lean Software Development
- Exercise: The Lean Penny SCRUM
- DSDM and FDD Details
- Kanban
- Scrumban

Tailoring Your Agile Process

- Building the Team (boosting performance, multi-tasking, distributed team members)
- Scaling Agile
- Agile Metrics
- Integrating Traditional Processes with Agile (integrating traditional Agile process requirements up-front & at-end, integrating Agile & waterfall teams on a project)

Duration: 14 Hours
Earn: 14 PDUs

7-Hr Introduction to Agile

This 7-hr course provides the basic knowledge for incorporating agile techniques on projects and will cover the Agile Manifesto and principles. The primary roles on an agile project and the five levels of agile planning will be explained. The use of user stories to define requirements will be described, along with the product backlog. Agile estimation techniques will also be reviewed including the use of story point scales and planning poker. Significant time will be spent explaining the elements of scrum -- the most commonly used agile methodology. The scrum sprint framework will be reviewed, including the sprint planning meeting, daily scrum, sprint review and retrospective. Key scrum artifacts will also be described including the product and sprint backlog, burn charts and task board. Other agile methods will be briefly reviewed, along with how to develop an effective agile team. Scaling agile to large projects and multiple teams will be explained, along with typical agile metrics.

Who Should Attend

This course is designed for people who are new to agile, in the early stages of agile adoption or who are curious about how to get started with an agile approach. Anyone from the IT Department or the Business area, from Management on down, would take value from this course as their organization moves to embrace Agile.

Course Objectives

The purpose of this course is to provide an introduction to agile. Upon completion of this course, the participant will be able to:

- Describe the Agile Manifesto and agile methodologies
- Define the primary roles and responsibilities on an agile project
- Describe the five levels of agile planning from vision down to daily scrums
- Write user stories to define requirements
- Use agile estimation methods to size user stories
- Describe agile artifacts such as the product and sprint backlog, burn charts and task board
- Explain typical agile project metrics

Course Outline

Understanding Agile

- Simple vs. Complex Projects
- Agile Defined
- Agile Values and Principles
- Agile vs. Waterfall Methodology
- The Business Case for Agile
- Risk Reduction with Agile

Agile Methodology

- Scrum
- Extreme Programming
- Dynamic Systems Development Method (DSDM)
- Feature Driven Development (FDD)
- Lean Development
- Kanban

Agile Teams & Planning

- The Agile Project Team
- Scaling Agile
- Levels of Agile Planning

The Scrum Framework

- Done in Scrum
- The Product Backlog
- User Stories & Prioritization
- Agile Estimation Techniques
- Scrum Sprints
- Scrum Artifacts
- Tracking the Agile Project

Tailoring Agile

- Building the Team
- Agile Metrics
- Integrating Traditional with Agile

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Agile Product Owner

This 7-hour course examines the vital role of product owner on an agile project. The product owner is the senior representative of the business, and the agile project will not succeed unless the product owner fulfills the role and responsibilities. This course will start with a brief review of key agile concepts, and then go into detail on the soft skills and characteristics needed by product owners. The course will then cover how to develop the product vision and roadmap based on understanding the users' desired experience. This includes tying the vision and roadmap to the business strategy, defining objectives and the business case, and prioritizing product features. Next, course attendees will learn how to write user stories including acceptance criteria. After this, the course will discuss how to build and prioritize the product backlog and develop the release plan. The final topic covers the product owner responsibilities on a sprint, including the planning meeting, collaborating with the team and reviewing the sprint products.

Who Should Attend

This course is designed for people who are going to be utilized in the role of Product Owner on a project. This course does include a review of the basic Agile principles but advance knowledge of Agile is a good idea.

Course Objectives

The purpose the 1-day Agile Product Owner course is to teach attendee how to serve as the product owner on an agile project. Upon completion of the course, participants will be able to:

- Explain the roles and responsibilities of product owners
- Build a product vision and roadmap and link it to business strategy
- Develop a list of product features and epics based on the users' desired experience
- Prioritize product features to maximize business value
- Write user stories including acceptance criteria
- Create and prioritize a product backlog and release plan

Course Outline

Review of Agile Concepts

- Agile Manifesto and Values
- Five Levels of Planning
- Agile Team Member Roles
- Scrum Basics

The Product Owner Role

- Role and Responsibilities of the Product Owner
- Desirable Characteristics of a Product Owner
- Soft Skills Needed by Product Owners
- Common Mistakes Made with the Product Owner Role
- Scaling the Product Owner Role
- Exercise 1: Select the Case Study Product Owner

Product Vision and Roadmap - The Starting Point

- Tying the Product Vision to Business Strategy and Minimal Marketable Product
- Determining the Product Objectives and Key Performance Indicators
- Preparing the Business Case to Maximize Business Value
- Defining the Product Including Epics and Features for Customer Satisfaction
- Exercise 2: Develop List of Product Features and Epics
- Prioritizing Solution Features & Avoiding Features Bloat
- Exercise 3: Prepare Product Roadmap

User Stories Creation and Maintenance

- Developing All Types of Project Requirements
- Writing Effective User Stories
- Writing Acceptance Criteria and Defining "Done"
- Refining and Splitting User Stories
- Exercise 4: Write User Stories

The Product Backlog

- Building the Product Backlog
- Prioritizing the Product Backlog
- Managing Changes to the Product Backlog
- Exercise 5: Prioritize Product Backlog

The Release Plan

- Using the Release Planning Process
- Obtaining Agreement for the Release Plan
- Using Progressive Refinement for Release Plan Updates
- Exercise 6: Prepare Release Plan

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

21-Hr Program Management

A program is defined as related projects, subsidiary programs, and other program activities managed in a coordinated manner to obtain benefits not possible when managing them individually. With program management maturity, an organization's projects are far more successful. The purpose of this 21-hour course is to introduce the participants to the best practices for the program manager. The practical implementation of project management within an organization is best achieved in the context of managing programs to deliver coordinated benefits to the enterprise. Beyond the well-established project management principles and knowledge areas, attention must be given to program governance, benefits management, and comprehensive stakeholder management. This course covers the five program management performance domains identified by the Project Management Institute (PMI)® in The Standard for Program Management® - Fourth Edition, which are program strategy alignment, program benefits management, program stakeholder engagement, program governance, and program life cycle management. The course integrates two practical case studies with the performance domains. Completion of this course will equip you to develop a program management strategy in an organization acquainted with 'management by projects..

Who Should Attend

This course will benefit program managers, business managers considering the establishment of program governance, and project managers seeking to augment their skills and professional credentials for career advancement. Prior Project Management Professional (PMP)® certification is suggested but is not a prerequisite to this course. Attendees must have a copy of PMI®'s *The Standard for Program Management®*.

Course Objectives

Upon completion of the 3-Day Best Practices in Program Management training, participants will be able to:

- Understand the basic definitions, domains, knowledge areas, and processes associated with program management
- Implement effective processes for initiating, planning, executing, controlling, and closing successful programs
- Understand the concepts of program life cycle governance, benefits realization, and sustainment
- Be better prepared to sit for the Program Management Professional (PgMP)® certification examination
- Manage program changes and risk events

Course Outline

Module 1: Course Overview

- Overview of Project, Program, and Portfolio Management
- Program Management Definitions
- Program Manager Role

Module 2: Program Framework

- Program Management Performance Domains
- Program Strategy Alignment
- Program Benefits Management
- Program Stakeholder Engagement

Module 3: Program Definition & Initiation

- Initiation of a Program
- Use of a Program Charter
- Program Financial Management

Module 4: Program Governance

- Benefits Realization Planning
- Program Scope Planning
- Planning, Structure & Quality
- Stakeholder Engagement
- Communications Planning

Module 5: Program Activities - Definition Phase

- Formulation
- Planning Phase
- Integration Management

Module 6: Program Activities - Delivery Phase

- Change Control
- Communications
- Financial Management
- Cost Estimation & Master Schedule
- Information Management
- Procurement Management
- Quality Management
- Program Resource Planning
- Risk Control
- Schedule Control
- Scope Control
- Managing Quality

Module 7: Program Closure

- Program Transition & Benefits Sustainment
- Financial Closure
- Procurement and Program Closure
- Resource Transition
- Risk Transition

Duration: 21 Hours
Earn: 21 PDUs

14-Hr Advanced Risk Techniques

This 14-hour course is designed for project managers and project team members who want to develop expertise in advanced techniques for managing project risks. Advanced risk concepts will be reviewed including the importance of understanding stakeholders and your own risk tolerance. How to completely describe project risks will be discussed, along with the use of brainstorming, checklists and fishbone diagrams for uncovering project risks. Effective risk prioritization techniques will be explained. The use of expected monetary value and decision trees for selecting the best alternative will be covered, along with the use of Monte Carlo for analyzing the cost and schedule risks on a project. The course will finish with a discussion on planning and managing risk responses. This course is interactive, with a demonstration of risk analysis software, exercises and sample problems to allow attendees to practice the tools and techniques presented during the course.

Who Should Attend

This course will benefit project managers, executives, functional managers, and any individuals needing a more detailed look into the management of project risk.

Course Objectives

Upon completion of this course, the participant will be able to:

- Explain organizational, stakeholder and personal risk tolerance
- Document a risk using the causes-risk event-impacts structure
- Prepare a fishbone diagram showing risk events
- Prioritize risks based on probability and impact ratings
- Prepare a decision tree using expected monetary value
- Explain how to use Monte Carlo for analyzing the project budget and schedule
- Describe the risk response options commonly used

Course Outline

Module 1: Core Risk Concepts

- Definition of Risk & Opportunity
- Why Project Risk Management
- Plan for Risk Management
- Risk Management – a Continuous Process
- Stakeholders Risk Tolerance
- Exercise 1: Individual Risk Tolerance

Module 2: Risk Identification Techniques

- Three Part Risk Statement
- Risk Causes Taxonsomy
- Risk Identification Template
- Risk Identification Techniques
- Exercise 2: Develop Checklist of Standard Risks
- Fishbone Diagrams
- Exercise 3: Develop Fishbone Diagram for The Meadows Schedule Delay
- Project Risk Analysis Model
- Exercise 4: Conduct PRAM Analysis for The Meadows Water Main Project
- Risk Identification Outputs

Module 3: Risk Prioritization Techniques

- Risk Factor Using Probability & Impact
- Risk Factor Using Weighted Extremes
- Risk Factor Using Multiple Factors
- Exercise 5: Prioritize the Meadows Risk Events

Module 4: Quantitative Risk Analysis Methods

- Expected Monetary Value
- Decision Trees
- EMV-Decision Tree Examples
- Exercise 6A (Homework): Prepared Decision Tree for Water Main Route
- Exercise 6B: Prepare Decision Tree for Contractor Selection
- Monte Carlo Simulation
- Cost Risk Simulation
- Schedule Risk Simulation
- Exercise 7: Determine the Meadows Cost Contingency

Module 5: Planning and Managing Risk Responses

- Responses for Threats and Opportunities
- Acceptance & Contingency Plans
- Exercise 8: Determine Risk Response Plans
- Monitoring Project Risks

Module 6: Risk Management Best Practices

- Looking for Opportunities
- Separating Causes and Risk Events
- Looking Beyond Checklists
- Correctly Scaling Impacts
- Using 100% Probability
- Using Risk Simulation
- Using a Risk Register
- Considering Contingency Plans
- Making Team Members Responsible for Risks
- Making Risk Management Ongoing

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Advanced Project Cost Management

This course will delve into the details and include practical hands-on exercises to provide advanced training for project cost management. The course will provide a comprehensive understanding of project cost management and earned value principles to enable attendees to leave with the competencies to improve cost management of their capital projects. The course will begin with developing work breakdown and other coding structures to effectively define project scope for project cost control. Discussion of contracting strategies will assist in the development of project control accounts. Recasting the project cost estimate to properly allocate costs to the control accounts is an important step in the planning process.

The course will then provide a step-by-step process in effective cost management using earned value principles to measure cost and progress, assess project status, establish the project forecast, control change and risk, and maintain the control baseline. Practical project cost control reporting will be covered to allow for effective communication of project status to management. The course will focus on early identification of potential performance problems to provide for effective project recovery to maintain project cost objectives. This course is intended for those involved in the management and control of large capital projects. A combination of lecture, practical examples, and interactive sessions will be utilized, providing the attendees with an opportunity to engage in discussions and to participate in an effective learning experience.

Course Features

- Understand key roles and responsibilities in project cost management
- Provide step-by-step exercises for the process steps to:
- Define project scope using work breakdown and other coding structures
- Establish control accounts required to support project control
- Recast the estimate to support budget allocation to the established control accounts
- Understand cost accounting and progress measurement
- Assess and evaluate project status using earned value techniques
- Determine the project cost forecast
- Understand change control and risk management
- Learn about maintaining control baselines
- Become familiar with various project cost reporting examples

Course Outline

Day 1

- Review of Cost Management Concepts
- Key Responsibilities in Project Cost Management
- Defining Project Scope
- *Practical Hands-On Exercise*
- Establish Control Accounts
- *Practical Hands-On Exercise*
- Recasting the Estimate for Budget Allocation
- *Practical Hands-On Exercise*
- Cost and Progress Measurement
- *Practical Hands-On Exercise*

Day 2

- Assessing Project Status
- *Practical Hands-On Exercise*
- Establishing the Forecast
- *Practical Hands-On Exercise*
- Change Control and Risk Management
- *Practical Hands-On Exercise*
- Maintaining Control Baselines
- Project Cost Management Reporting

Duration: 14 Hours
Earn: 15 PDUs (1 hour of homework

14-Hr Managing Projects Using Earned Value

Earned value analysis is the most effective method for measuring project performance. This 14-Hour program will cover techniques and best practices in applying earned value analysis on projects.

This course will start off with a review of earned value terminology and calculations. Moving on, this course will then describe the required elements of a project plan that makes doing earned value analysis possible. The effective development of a Work Breakdown Structure (WBS) will be discussed, including identification of deliverables, control accounts and work packages. The preparation of the project schedule and budget using the WBS will also be explained. With the development of an integrated project plan linking the WBS, schedule and budget, the use of earned value analysis is very easy to implement as a control tool for the project. Additionally, this course will reference and discuss examples of actual earned value use on projects and class participants will take part in many earned value analysis practice exercises.

Who Should Attend

This course is intended for people who are leading or actively participating on project teams where earned value analysis is or will be used. Attendees should have some basic project management knowledge and experience.

Course Objectives

Upon completion of this course, the participants will be able to:

- Discuss techniques and best practices in using earned value on projects
- Explain why measuring project performance is important
- Explain the terminology and calculations used in EVA
- Prepare an integrated project plan including WBS, budget, schedule and PV curve
- Utilize performance reporting techniques to determine progress for project activities
- Determine project status using EVA information
- Determine estimate-at-completion for project using EV data

Course Outline

Importance of Performance Measurement

- Individual Exercise #1: Analyze Cost Curves
- Performance Reporting Techniques
- Evolution of Earned Value Analysis

Earned Value Terminology

- PV, AC, and EV Defined
- CV and SV Defined
- SPI and CPI Defined
- SPI and Critical Path Scheduling
- Individual Exercise #2: Interpreting EV Data

Progressing Techniques

- Common Progressing Techniques
- Individual Exercise #3: Determine Progressing Techniques to use
- Team Exercise: List examples of progressing techniques for project

Project Cost Forecasting

- Estimating-as-Completion Formulas
- To Complete Performance Index (TCP)

Why EVA Doesn't Work

Preparing the Project Plan

- Scope the Project Using a Work Breakdown Structure
- Steps in Developing the Project Schedule

Project Planning Exercises

- Exercise: Develop Schedule for Heaven Acres Project
- Review Heaven Acres Schedule Solution
- Exercise: Establish the Project PV Graph
- Review Project PV Graph Solution

Monitoring Project Results

- Reporting Results
- Use of Adjusted Actual Cost Information
- Exercise: Monitoring Project Results & Forecasting - Design Phase
- Exercise: Monitoring Project Results & Forecasting - Construction Phase

Use of Earned Value When Resources Don't Record Time

Duration: 14 Hours
Earn: 14 PDUs

14-Hr Turning Around Problem Projects

Project managers and executives do not like to talk about "problem" projects; however, the reality is that they do exist. Much time and effort is spent on the development and implementation of project management best practices to assure that projects are completed successfully. However, from time-to-time, we are faced with events that result in a troubled or "problem" project that becomes in jeopardy with regards to our anticipated criteria used to define success. This two-day course prepares you to be able to identify and assess problems that result in problem projects and implement recovery techniques to turn the project around for successful completion.

Who Should Attend

This course should be attended by project managers and any individuals involved with requirements to assessment and turnaround of problem projects. This course assumes that attendees have a solid understanding of and competency in the generally accepted best practices of project management.

Course Objectives

This practical course emphasizes the fundamentals of identification, assessment and recovery of problem projects. Through instruction, dialog and practical examples and exercises, upon completion of this course you will be able to:

- Recognize classical symptoms of problem projects
- Determine the root cause of problems
- Implement Critical Steps to Initiate Turnaround
- Successfully use Systematic and Creative Resolution Techniques
- Know when and how to terminate doomed projects
- Implement Problem Prevention Techniques

Course Outline

What You Should Know About Problem Projects

- Definitions and Characteristics
- Problem Solving
- Problem Project Symptoms
- Types of Problem Projects

Problem Solving Strategies

- Problem Solving Strategies
- Problem Project Resolution Approaches
- Project Risk Management

Systematic Approach to Resolution

- Problem Project Identification & Understanding
- Problem Project Assessment and Analyzing
- Solution Selection & Implementation

Creative Approach to Resolution

- LOGPAD, JAD & Dialogue Mapping

Turning Around Problem Projects

- Critical Steps for Turn Around
- Sources of Problem Projects
- Problem Project Situations

How to Terminate "Doomed" Projects

- Steps in Canceling a Project
- Recognizing "Doomed" Projects
- Project Close Out Plans

Problem Project Prevention

- DO's for Success
- DON'T's for Success
- Top Strategies for Project Success

Duration: 14 Hours
Earn: 14 PDUs

7-Hr Advanced Project Planning

The 1-day Advanced Project Planning course examines the work involved to enhance the planning effort, so as to produce the best possible project outcomes. This course will take the Project Manager past the basics and into the thinking that must happen to maximize projects that meet their objectives while staying within the bounds of schedule, cost and scope.

We will start by discussing the problems that cause so many projects to miss their deadlines, and then move into techniques that can help resolve those problems.

Who Should Attend

This course will benefit project managers that are experiencing problems getting their projects completed within the boundaries that were established during project planning, by showing them how to mitigate those issues.

Course Objectives

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

- Understand the most common reasons why projects miss deadlines
- Understand why things get missed during planning and how to do better at this
- Make use of Risk Analysis techniques to recognize problems in advance and avoid them
- Increase the effectiveness of estimation techniques used during planning
- Make use of efficient project contingency planning

Course Outline

Class Introduction and Course Overview

Module 1: Why Do Deadlines and Estimates Go Wrong?

- Project Perfection
- Planning Problems
- Missing Important Elements During Planning
- Resource Conflict
- The Pressure From Above

Module 2: How Could We Have Missed That?

- Making Use of the Past by Accessing Those Lessons Learned
- Examining Old Projects
- The Project Question Checklist
- Exercise 1: Build a Project Question Checklist

Module 3: Risk Analysis

- Risk Basics Review
- Identifying Risks with the Team
- A New Risk Register
- Expected Monetary Value
- Exercise 2: Risk Analysis

Module 4: Estimation

- The Problem with Estimates
- Estimation Basics Review
- The PERT Technique
- Relative Estimation in Waterfall
- Exercise 3: Using PERT

Module 5: Contingency

- Why is this Necessary?
- Using the PERT Technique to Calculate Contingency
- Critical Chain and the use of Buffers
- Embedding Work and Duration Contingency into the Schedule
- Managing Contingency as the Schedule Progresses
- Exercise 4: Building in Contingency

Module 6: Implementation

- Training Your Teams
- New Focus on Making Use of the Past
- The Project Question Checklist
- New Focus on Risk Management
- Working with Senior Management
- What Happens Now?

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Advanced Risk Management Skills

This course on advanced risk management is specifically designed for Project Managers seeking to learn advanced risk management skills. This course will start with a brief review of the risk management process. Quantitative risk identification and analysis tools and techniques will then be presented including Fishbone Diagrams, Expected Monetary Value and Monte Carlo probability simulation. Application of risk management to project budgets and schedules will be described using specific examples. This course will be highly interactive, with exercises and sample problems to allow attendees to practice the tools and techniques presented.

Who Should Attend

This course is intended for people who are leading or actively participating on project teams where advanced risk management techniques are needed to ensure project success. Attendees should have some basic knowledge and experience in applying basic risk management techniques to projects.

Course Features

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

- Construct a Cause-Effect (Fishbone) Diagram for identifying project risks
- Conduct an Expected Monetary Value Analysis
- Understand how to conduct a Monte Carlo analysis on a project
- Explain how to use risk analysis techniques to determine project contingencies

Course Outline

Core Risk Concepts

- Review Risk Management Process
- Risk Identification
- Risk Analysis
- Risk Response Planning
- Risk Monitoring and Control

Advanced Risk Identification Techniques

- Cause-Effect (Fishbone) Diagram format description
- Usage of Cause-Effect (Fishbone) Diagram format and examples
- Advanced Risk Identification Techniques class and team exercises

Expected Monetary Value

- Expected Monetary Value format description
- Usage of Expected Monetary Value format and examples
- Decision Trees
- Team Exercise: Expected Monetary Value preparation

Monte Carlo Analysis Simulation

- Monte Carlo analysis description
- Monte Carlo analysis examples and exercises

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Portfolio Management

While project management is about doing projects right, portfolio management is about doing the right projects. This course will explain how an organization develops a vision, mission and strategy, which then results in a portfolio of projects to meet strategic business objectives. The relationship among portfolio, program and project management will be explored, along with the link between portfolio management and operations management. Quantitative portfolio management metrics will also be covered.

Roles and responsibilities of people involved with portfolio management will be discussed. Portfolio management processes will be reviewed including how projects are evaluated and selected as well as and monitoring and controlling the portfolio. Best practices for portfolio governance will be explained along with effective techniques for portfolio risk management. This course will also explain how to prepare a high-level business case for portfolio projects ranking and will cover key business case terminology and formulas including net present value, internal rate of return and payback period. This course includes an exercise to decide on the project portfolio based on a company's mission, vision and strategic plans.

Who Should Attend

This course is designed for anybody involved with managing a portfolio of projects including Portfolio Managers, Executive Review Board members, Portfolio Management Board members, Project Sponsors, Operations Management, Program Managers and Project Managers. PMP® certification is suggested but is not a prerequisite to this course.

Course Objectives

Through instruction and real-world examples and exercises drawing from the experience of the instructor, upon completion of this course you will:

- Understand the basic definitions, knowledge areas and processes associated with portfolio management
- Know the elements of organizational strategy and how that relates to the portfolio
- Know how to prepare a high-level business case for portfolio projects ranking
- Understand the roles and responsibilities for portfolio management
- Know how to develop and manage a portfolio

Course Outline

Portfolio Management Explained

- Definition of a portfolio
- Portfolio management lifecycle
- Relationship of portfolio to programs and projects
- Strategy and investment alignment
- Organizational structures for portfolio management
- Portfolio stakeholder roles and responsibilities

Portfolio Management Processes

- Aligning processes
- Monitoring & controlling process

Portfolio Governance

- Identifying potential projects
- Developing high-level project plans
- Preparing a high-level business case
- Categorizing potential projects
- Prioritizing projects portfolio using scoring models
- Balancing the portfolio
- Reporting portfolio performance using metrics
- Monitoring business strategy changes
- Dealing with the portfolio 'churn rate'

Portfolio Risk Management

- Determining the risk level of the portfolio
- Identifying and analyzing portfolio risks
- Developing portfolio risk responses
- Monitoring and controlling portfolio risks
- Program financial framework

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Fundamentals of Earned Value

Earned value analysis (EVA) is the most effective method for measuring project performance and forecasting final project cost and schedule. This 7-hour course on Earned Value Fundamentals will cover the fundamentals and best practices for using earned value on projects, and provide attendees with a complete understanding of earned value basics. This course will start with a review of the definition and the value in performance reporting. This will be followed by a description of earned value terminology, formulas and the various physical progressing techniques available to establish what work was accomplished. The course will cover how to monitor project performance using earned value data, including formulas for forecasting the final project cost and schedule. This course will also explain how to handle project contingency funds when using earned value. The final topic will cover the project elements needed to make earned value work on projects. This course will reference and discuss examples of earned value use on projects. In addition, class participants will take part in earned value analysis practice exercises and a knowledge review test at the end of the course.

Who Should Attend

This course is intended for people who are leading or actively participating on project teams where earned value analysis is or will be used. Attendees should have some basic project management knowledge and experience.

Course Features

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

- Describe why measuring project performance is important
- Explain the terminology and calculations used for earned value analysis
- Select progressing techniques for project work packages and control accounts
- Determine work status and take corrective actions using earned value information
- Calculate cost and schedule estimate-at-completion using earned value data
- Describe what is needed on a project to make earned value successful

Course Outline

Topic 1: Why Performance Measurement?

- Exercise #1: Evaluate Project Performance Data
- Performance Reporting Definition, Inputs and Methods
- Earned Value Defined
- Evolution of Earned Value and ANSI/EIA Standard

Topic 2: Earned Value Terminology and Formulas

- PV, AC and EV Defined
- Calculating Earned Value
- CV and SV Defined
- Traditional Cost Management vs. Earned Value
- SPI Defined
- SPI and Critical Path Scheduling
- CPI Defined
- Exercise #2: Interpreting EV Data

Topic 3: Progressing Techniques

- Units Completed
- Incremental Milestones
- Start-Finish
- Apportioned Relationship
- Level of Effort
- Individual Judgment
- Combination Methods
- Exercise #3: Determine Progressing Technique
- Class Discussion: Progressing Techniques Example

Topic 4: Project Cost Forecasting

- Key Terminology
- Forecasting Final Results – Factors and Steps
- Estimate-at-Completion Formulas
- To-Complete Performance Index – TCPI
- Handling Contingency & Reserve
- EAC and TCPI Examples - Good and Bad Projects
- Exercise #4: Determine Project Progress & Forecast Result

Topic 5: Project Schedule Forecasting

- Forecasting Using Earned Schedule
- Estimate at Completion Formulas
- Exercise #5: Determine Schedule Status & Forecast Completion Data

Topic 6: Things Needed for Earned Value to Work

- Mature Projects Organization
- Defined Project Scope (Backed by Project Requirements and a WBS)
- Integrated & Correct Project Plan
- Schedule & Budget Contingency Management
- Change Management Process
- Accurate Reported Result

Duration: 7 Hours
Earn: 7 PDUs

35-Hr Business Analysis Training

Business analysis is the discipline of identifying business needs, determining solutions to business problems, and for a specific project, eliciting, documenting, and managing requirements. Proper application of business analysis on a project dramatically increases the chances of successfully completing the project and obtaining the project benefits. This 3-day course provides the fundamental knowledge needed for doing business analysis activities on projects, both Waterfall and Agile.

The course will cover in detail the types of project requirements and key business analysis processes. Effective techniques for eliciting and analyzing requirements will be discussed. Course topics also include writing good requirements, managing changes to requirements, communicating requirements, and tracing scope back to requirements. Implementing the solution, including organizational readiness, defect handling, and benefits achievement will also be covered. This course will prepare you to immediately start implementing business analysis best practices on projects.

Who Should Attend

This course will benefit new business analysts, project managers, project team members, and functional managers interested in learning how to apply business analysis practices for managing project requirements on Waterfall and Agile projects.

Course Features

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

- Define the types of project requirements
- Prepare a basic plan for business analysis on a project
- Elicit project requirements using various techniques
- Write clear and unambiguous requirements
- Prepare a requirements documentation package
- Analyze & prioritize project requirements
- Validate the project solution
- Confirm benefits achievement
- Understand the BA's role on an Agile project

Course Outline

Module 1: Business Analysis Fundamentals

- What is Business Analysis?
- Key Business Analysis Processes
- Skills & Expertise Needed for the BA Role
- IIBA® and PMI® BA Certifications
- Types of Requirements

Module 2: Business Analysis Planning

- The Business Analysis Approach
- Stakeholder Analysis
- Communications Planning
- Planning for Requirements Management
- Managing BA Performance

Module 3: Requirements Elicitation

- Key Steps for Elicitation Preparation
- Elicitation Techniques (Interviews, Brainstorming, Survey, Group Events, Observation, Prototyping)
- Elicitation Results Confirmation

Module 4: Strategy Analysis

- Define Business Need
- Assess Capability Gap
- Define Business Case

Module 5: Requirements Management and Communication

- Guidelines for Writing Good Requirements
- Requirements Package Preparation
- Traceability of Scope Back to Requirements
- Requirements Baseline
- Requirements Change Management
- Communication of Requirements

Module 6: Requirements Analysis

- Verification & Validation of Requirements
- Organization & Prioritization of Requirements
- Analysis Model Techniques (Scope, Process Flow, Data, Rules, Interface)
- Use Cases
- Solution Documentation

Module 7: Solution Evaluation and Validation

- When & How to Validate the Solution
- Organizational Readiness Assessment
- Acceptance Criteria Evaluation
- Solution Implementation & Defect Handling
- Benefits Achievement Confirmation

Module 8: The Business Analyst's Role in Agile

- Agile Overview
- Agile Roles and the BA
- User Stories
- Agile Myths

Duration: 35 Hours
Earn: 35 PDUs, 35 CDUs

21-Hr CBAP® Examination Preparation

This 21-hour program provides an intensive review of the subject matter tested on the International Institute of Business Analysis' Certified Business Analyst Professional (CBAP®) examination (Version 3). You will improve your test-taking skills by completing a Sample Examination of 200 questions and by discussing the rationale behind both correct and incorrect answers. The program is specifically designed to maximize the probability that you will succeed in passing the examination the first time. Each student will receive handout material, the sample examination questions, and a copy of the International Institute of Business Analysis' *The Guide to the Business Analysis Body of Knowledge (Version 3)*.

Who Should Attend

All individuals who plan to take the International Institute of Business Analysis' Certified Business Analyst Professional (CBAP®) examination (Version 3) should attend this seminar.

Course Objectives

This program emphasizes the six knowledge areas of the IIBA's *The Guide to the Business Analysis Body of Knowledge*, which serves as the basis for the CBAP® certification examination (Version 3). Upon completion of this program, you will be able to:

- Identify personal strengths and weaknesses in each of the knowledge areas
- Explain the correct answers to each of the Sample Exam questions
- Develop a personalized strategy for passing the CBAP® Exam (Version 3)

Course Outline

Introduction and CBAP® Program Overview

- Applying for and Taking the Exam
- Strategies: General and Question-by-Question

Business Analysis Key Concepts

- BACCTM™
- Key Terms
- Requirements Classification Schema

Business Analysis Planning and Monitoring

- Planning BA Approach
- Plan Stakeholder Engagement
- Plan Business Analysis Governance

Elicitation and Collaboration

- Prepare for Elicitation
- Conduct Elicitation

Requirements Lifecycle Management

- Trace Requirements
- Prioritize Requirements
- Approve Requirements

Strategy Analysis

- Analyze Current State
- Define Future State
- Define change Strategy

Requirements Analysis and Design Definition

- Specify and Model Requirements
- Verify and Validate Requirements
- Define Requirements Architecture
- Define Solution Option

Solution Evaluation

- Measure Solution Performance
- Assess Solution Limitations
- Recommend Actions to Increase Solution Value

Fundamentals

- Underlying Competencies
- Techniques
- Business Analysis Perspectives

Duration: 21 Hours
Earn: 21 PDUs, 21 CDUs

21-Hr Business Analysis Training

Business analysis is the discipline of identifying business needs, determining solutions to business problems, and for a specific project, eliciting, documenting, and managing requirements. Proper application of business analysis on a project dramatically increases the chances of successfully completing the project and obtaining the project benefits. This 3-day course provides the fundamental knowledge needed for doing business analysis activities on projects, both Waterfall and Agile. The course will cover the types of project requirements and key business analysis processes. Effective techniques for eliciting and analyzing requirements will be discussed. Course topics also include writing good requirements, managing changes to requirements, communicating requirements, and tracing scope back to requirements. Implementing the solution, including organizational readiness, defect handling, and benefits achievement will also be covered. This course will prepare you to immediately start implementing business analysis best practices on projects.

Who Should Attend

This course will benefit new business analysts, project managers, project team members, and functional managers interested in learning how to apply business analysis practices for managing project requirements on Waterfall and Agile projects.

Course Objectives

After successful completion of this course, attendees will be able to:

- Define the types of project requirements
- Prepare a basic plan for business analysis on a project
- Elicit project requirements using various techniques
- Write clear and unambiguous requirements
- Prepare a requirements documentation package
- Analyze & prioritize project requirements
- Validate the project solution
- Confirm benefits achievement
- Understand the BA's role on an Agile project

Course Outline

Module 1: Business Analysis Fundamentals

- What is Business Analysis?
- Key Business Analysis Processes
- IIBA® *A Guide to the Business Analysis Body of Knowledge® (BABOK® Guide)*
- PMI® *Business Analysis for Practitioners: A Practice Guide®*
- Skills & Expertise Needed for the BA Role
- IIBA® and PMI® BA Certifications
- Types of Requirements

Module 2: Business Analysis Planning

- The Business Analysis Approach
- Stakeholder Analysis
- Communications Planning
- Planning for Requirements Management
- Managing BA Performance

Module 3: Requirements Elicitation

- Key Steps for Elicitation Preparation
- Elicitation Techniques (Interviews, Brainstorming, Survey, Group Events, Observation, Prototyping)
- Elicitation Results Confirmation

Module 4: Requirements Management & Communication

- Guidelines for Writing Good Requirements
- Requirements Package Preparation
- Tracability of Scope Back to Requirements
- Requirements Baseline
- Requirements Change Management
- Communication of Requirements

Module 5: Requirements Analysis

- Verification & Validation of Requirements
- Organization & Prioritization of Requirements
- Analysis Model Techniques (Scope, Process Flow, Data, Rules, Interface)
- Use Cases
- Solution Documentation

Module 6: Solution Evaluation & Validation

- When & How to Validate the Solution
- Organizational Readiness Assessment
- Acceptance Criteria Evaluation
- Solution Implementation & Defect Handling
- Benefits Achievement Confirmation

Module 7: The Business Analyst's Role in Agile

- Agile Overview
- Agile Roles and the BA
- User Stories
- Agile Myths

Duration: 21 Hours
Earn: 21 PDUs, 21 CDUs

7-Hr Introduction to Business Analysis

Project requirements are a critical factor for project success. Disconnects can exist between the producers of the solution and the business users who need the functionality the project will provide. Business analysts (BAs) are the intermediary between these two groups, bridging the communication gap through both business and technical knowledge.

This 7-hour course will introduce you to the complex world of business analysis and will focus on the underlying competencies needed by successful business analysts. Key concepts of business analysis will be reviewed including types of requirements. The importance of analytical thinking, problem solving, communications, negotiating and other key business analysis competencies will be reviewed. How the business analyst uses project management in support of the project life cycle will be described. The course also includes a step-by-step tour of an actual IT project from the perspective of a Business Analyst.

Who Should Attend

This course will benefit people who are looking for a brief introduction on business analysis. Potential attendees include new business analysts, project managers, project team members, functional managers, and other project stakeholders looking for an understanding on the use of business analysis on projects, and the underlying competencies needed by business analysts.

Course Objectives

Upon completion of this course, the participants will be able to:

- Explain the role of a business analyst on projects
- Describe the types of project requirements
- Explain the underlying competencies needed by a business analyst
- Describe how a business analyst uses project management in support of the project cycle

Course Outline

Business Analysis Key Concepts

- What is Business Analysis?
- Domains & Solutions
- Requirements Stakeholders
- Definition & Types of Requirements

Business Analysis Underlying Competencies

- Behavioral Characteristics
- Business Knowledge
- Communication Skills

Analytical Thinking & Problem Solving

- Formal Reasoning Skills
- Information Analysis Tools
- Reporting the Results

Negotiation & Leadership

- Negotiations & Facilitation Defined
- Types of Power
- Negotiation Preparation & Stages
- Leadership

Project Management & the Business Analyst

- Project Management Institute
- Projects
- Project Management Knowledge Areas
- Project Management Processes
- Project Life Cycle Models

The Business Analyst Role on a Project

- The Food Kiosk Project
- Project Startup
- Requirements Documentation
- Solution Assessment
- Testing
- Implementation

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Preparing Effective Use Cases

A Use Case is a list of steps, typically defining interactions between a role (actor) and a system, to achieve a goal. Use Cases are becoming a common tool for describing functional requirements for software systems and for documenting business processes. The technique itself seems simple, however those unfamiliar with Use Cases are usually confronted with questions about what they are supposed to write – how much and at what level of detail?

This concise course provides the guidelines for Use Case writing and will include many examples of good Use Cases. The course is a mix of instructor lecture and exercises. It begins with an introduction to what Use Cases are and how they add value to the process. This is followed by a comprehensive explanation of the Use Case segments including actors, goals, exceptions, scenarios, alternate paths, preconditions and success guarantees.

Who Should Attend

This course is intended for people who are involved with documenting project requirements and want to learn how to prepare effective Use Cases for their projects. Project personnel including Business Analysts, Project Managers, project and resource managers, clients involved on projects, and others with project responsibilities will find this course relevant to their project work.

Course Objectives

Upon completion of this course, the participants will be able to:

- Understand the body parts of a Use Case
- Know the three named goal levels
- Describe key terms such as conditions, triggers and guarantees
- Know the steps in building a Use Case including the main success scenario and extensions
- Prepare Use Cases
- Avoid the common mistakes made when preparing Use Cases

Course Outline

Module 1: Introduction to Use Cases

- What is a Use Case?
- Background
- Why Use Cases?
- Requirements and Use Cases

Module 2: Use Case Body Parts

- Use Case Element Overview
- Usage Narratives
- Actors, Goals and Relationships
- Exercise 1: Brainstorm Actors
- Exercise 2: Brainstorm Goals
- Interactions
- Use Case Levels
- Guarantees
- Triggers
- Pre-conditions
- Exercise 3: Write Use Case Structure

Module 3: Scenarios, Steps and Extensions

- Scenarios and Action Steps
- Action Step Guidelines
- Exercise 4: Write Use Case Steps
- Extensions
- Exercise 5: Write Use Case
- Exercise 6: Write Use Case Extensions
- When Are We Done?

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Requirements Analysis Techniques

This course will cover techniques for analyzing requirements in order to define the required capabilities of the project solution. Methods to prioritize requirements will be discussed, which is done to ensure analysis efforts focus on the most important requirements. The importance of organizing requirements will be reviewed. This is necessary to understand which models are needed to analyze the project requirements from all stakeholder perspectives. This course will focus on the main diagramming models used to analyze requirements, including data flow diagrams, process modeling and data modeling. Diagrams serve two vital purposes – documentation and analysis of the information gathered and testing of the requirements. How to write use cases will be covered, which describes how a user interacts with a solution to accomplish goals. Other techniques for modeling requirements will be reviewed such as business rules analysis, prototyping, sequence diagrams and state diagrams.

Who Should Attend

This course will benefit business analysts, functional managers, project managers, programmers and other project personnel interested in learning about the analysis of project requirements.

Course Objectives

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

- Describe the tasks needed for requirements analysis
- Explain the purpose and methods of prioritizing and organizing requirements for analysis
- Interpret commonly used process and data models
- Prepare use cases and user stories
- Explain how to verify and validate project requirements

Course Outline

Requirements Analysis Overview

- What is Analysis?
- Requirements Analysis Tasks
- Reasons for Prioritizing Requirements
- Prioritization Methods
- Techniques for Organizing Requirements
- Models Selection Considerations
- Requirements Verification and Validation

Use Cases & User Stories

- Use Case Definition, Purpose and Usage
- Use Case Elements
- Business vs. System Use Cases
- Writing Use Cases & User Stories
- Use Case Diagrams - Components & Guidelines

Process Modeling

- Purpose, Description and Usage
- Notation Elements
- Steps to Build a Flowchart
- Activity Diagrams

Data Modeling & Flow Diagram

- Purpose, Description and Usage
- Data Flow Diagram Types & Elements
- Yourdon and Gane-Sarson Notation
- Data Modeling Types & Elements
- Steps to Build an Entity Relationship Diagram (ERD)
- Class Diagrams

Other Modeling Techniques

- Business Rules Analysis
- Data Dictionary and Glossary
- Prototyping
- State and Sequence Diagrams
- Miscellaneous Modeling Techniques

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Requirements Elicitation Techniques

Requirements are the foundation for the solution to the business need. Studies repeatedly find poor requirements are the leading cause of project failures. This course will briefly review the sources and types of requirements. The elicitation process will be explained from preparing for elicitation, conducting elicitation, documenting and confirming project requirements. Common techniques for eliciting requirements from project stakeholders will be reviewed, including brainstorming, document analysis, focus groups, interface analysis, observation, prototyping, requirements workshops and surveys. A focus of this course will be interviews since it is the most frequently used elicitation technique. Types of interview questions and best practices for preparing questions will be discussed. The final topic will be methods for testing project requirements for completeness and correctness.

Who Should Attend

This course will benefit business analysts, programmers, project managers, executives, functional managers, and any other individuals interested in improving their effectiveness in eliciting project requirements.

Course Objectives

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

- Explain the various sources of requirements
- Know the different types of requirements
- Use many of the common methods to elicit requirements
- Explain typical problems with the elicitation process
- Use methods for confirming project requirements

Course Outline

Overview of Elicitation

- Why Projects Fail
- Types of Requirements
- Elicitation Processes
- Role of the Business Analyst

Interviews and Questioning Techniques

- Interview Success Factors
- Designing the Interview
- Conducting the Interview
- Using Closed and Open-ended Questions
- Clarifying with Questions

Other Elicitation Techniques

- Brainstorming
- Document Analysis
- Focus Groups
- Interface Analysis
- Observation
- Requirements Workshop

Surveys **Document and Confirm Elicitation Results**

- Verification versus Validation
- Requirement Reviews
- Quality Checks

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Solution Assessment and Validation

This course will explain the work done to facilitate successful project implementation and to validate the project solution meets the business need. Solution options such as custom build, commercial off-the-shelf and third party hosted will be discussed along with guidelines for selecting a solution approach using decision analysis. The use of evaluation criteria for selecting a vendor will also be covered. Methods for assessing organizational readiness will be reviewed along with proven strategies for introducing change. Testing of the solution will be reviewed including types of testing, documentation, plus the testing and defect repair processes. Key considerations for solution implementation will be discussed such as release planning, implementation options, transition requirements and data migration. The final topic will be best practices for solution performance evaluation to ensure the business need is being met.

Who Should Attend

This course will benefit business analysts, executives, functional managers, project managers, programmers and other project personnel interested in learning the fundamentals for assessing and implementing a project solution, plus validating it meets the business need.

Course Objectives

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

- Explain project solution options and how to select a solution using decision analysis
- Establish evaluation criteria for vendor assessment
- Determine organizational readiness on a project
- Describe the types of testing and documentation done on projects
- Assist in the preparation of implementation plans
- Evaluate solution performance to validate the business need is met

Course Outline

Assessing the Proposed Solution

- Project Solution Options (custom development, commercial off-the-shelf and third party hosted)
- Appropriate Usage of Solution Options
- Evaluation Criteria for Vendor Assessment
- Selecting a Solution using Decision Analysis

Assessing Organizational Readiness

- Cultural Assessment
- Operational & Technical Assessment
- Stakeholder Impact Analysis
- Force Field Analysis
- Strategies for Introducing Change

Testing the Solution

- Validating the Solution
- Types of Testing
- Testing Process
- Testing Documentation
- Defect Repair Process

Implementing the Solution

- Allocation of Requirements to Solution Components
- Release Planning Considerations
- Implementation Options and Plan
- Transition Requirements
- Data Migration

Evaluating Solution Performance

- Value Analysis Process
- Project Acceptance Criteria
- Types of Solution Performance Metrics
- User Feedback

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Building a Solid Foundation for Testing

This course provides Business Analysts and other project personnel with a complete foundation on the testing process. This includes the upfront planning, testing definitions, types of testing, testing documentation, and the solution validation done after implementation. This course includes exercises designed for attendees to practice the course concepts and techniques. Exercises will include creating a test plan, writing test cases, and deciding on a testing approach. The skills covered in this course will prepare attendees to immediately start implementing the principles and techniques of testing on projects.

Who Should Attend

This course will benefit business analysts, functional managers, project managers, programmers and other individuals interested in expanding their effectiveness when dealing with project requirements and testing.

Course Objectives

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

- Understand the types of testing done on a project
- Identify those involved in testing
- Correctly place testing in the Project Lifecycle
- Create a test plan and approach
- Write test cases
- Understand how to conduct testing on a project
- Understand how to track, report and analyze bugs

Course Outline

Module 1: Introduction to Testing

- Testing Definition and Goals
- Types of Testing (Unit, Integration, System, User Acceptance)
- Testing Participants
- Methods of Testing (White, Gray and Black Box)
- Functional and Non-Functional Testing
- Manual and Automated Testing
- Testing Documentation
- When Testing is Done During the Project Life Cycle

Module 2: Requirements and Testing

- Types of Requirements
- Documenting Requirements on Agile Projects with User Stories
- Writing Effective Requirements
- Relationship Between Requirements & Testing
- Exercise 1: Critique Requirements & Review Testability
- Requirements Prioritization
- Requirements Traceability

Module 3: Testing Approach and Plan

- Testing Strategies and Approaches
- Exercise 2: Decide on Testing Approach
- Testing Plan Elements
- Testing Success Criteria and Sign-off Requirements
- Testing Environment and Data
- Testing Schedule & Tie to Project Schedule

Module 4: Testing Documentation

- Writing Good Testing Requirements
- Writing Test Cases and Scripts
- Exercise 3: Write Test Cases

Module 5: Testing the Product

- Test Case Log
- Tracking Test Cases
- Reporting and Analyzing Bugs
- Defect Repair Process
- User Testing & Stabilization
- Bug Convergence & Zero Bug Bounce
- Establishing 'Done' for Testing

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

3-Hr Business Analysis Planning and Monitoring

Proper business analysis planning ensures an efficient process will be used for eliciting and managing project requirements. This concise course covers the key elements of business analysis planning and monitoring. The different approaches for waterfall versus agile projects will be explained. The importance of identifying and analyzing project stakeholders will be discussed. The key components of the business analysis plan will be reviewed including work scope, schedule, cost estimate, risk management and communications. This 3- hour course will also explain how to manage requirements and changes to requirements. The final topic covered in this course are best practices for managing the business analysis work including performance reporting and status communications.

Who Should Attend

This course will benefit business analysts, programmers, project managers, executives, functional managers, and any other individuals involved with the planning and monitoring of business analysis activities on projects.

Course Objectives

The purpose of this course is to provide the skills needed to plan and monitor business analysis activities. Upon completion of this course, participants will be able to:

- Describe the difference between a waterfall and iterative project approach
- Explain the plan items needed for business analysis work for a project
- Know how to manage both requirements and the business analysis work

Course Outline

Module 1: Business Analysis Approach

- Planning Approach for Waterfall and Iterative Projects
- Stakeholders Identification
- Stakeholder Analysis
- Managing Stakeholders Expectations

Module 2: Business Analysis Planning

- Defining Scope of Work for Business Analysis
- Business Analysis Schedule
- Estimating BA Work
- Risk Management
- Communications

Module 3: Managing Business Analysis Work

- Managing Requirements
- Managing BA Work Performance

Duration: 3 Hours
Earn: 3 PDUs, 3 CDUs

3-Hr Requirements Management and Communication

This 3-hour course covers the activities for managing and communicating requirements to ensure all stakeholders have a shared understanding of the project requirements, and stakeholders with approval authority are in agreement with the requirements the solution will meet. Requirements traceability will be described along with techniques to ensure requirements are supported by business objectives and linked to specific solution components. Baselining requirements and managing changes will be discussed, along with handling conflicts and issues. Types of requirements documentation will be covered along with tips for writing effective business and functional requirements. The importance of communicating to bring stakeholders to a common understanding of requirements will be described along with proven techniques for sharing requirements.

Who Should Attend

This course will benefit business analysts, programmers, project managers, executives, functional managers, and any other individuals looking to improve their effectiveness in managing and expressing requirements.

Course Objectives

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

- Prepare a requirements traceability matrix
- Document and manage changes to requirements
- Understand the different communication methods available
- Explain the structure and content of a requirements package
- Describe techniques for communicating requirements

Course Outline

Module 1: Manage Solution Scope and Requirements

- Purpose, Description and key inputs
- Conflict Management and Presenting Requirements for Review
- Problem Tracking
- Baselining Requirements

Module 2: Manage Requirements Traceability

- Definition and Examples
- Benefits of Traceability
- Requirements Relationship Types
- Impact Analysis
- Traceability Matrix Example

Module 3: Prepare Requirements Package

- Purpose and Structure
- Questions to Consider
- Business Requirements Document
- Writing Business Requirements
- Functional Requirements Document
- Writing Functional Requirements

Module 4: Communicate Requirements

- Communication Skills
- Communication Inputs
- Use of Presentations
- Structured Walkthroughs

Duration: 3 Hours
Earn: 3 PDUs, 3 CDUs

3-Hr Fundamental Elements of Strategic Analysis

This concise 3-hour course will examine the pre-project work to identify a business need, develop potential alternative solutions, and the business case analysis to justify the investment to deliver the solution. This work done to define new projects is called strategic analysis. The importance of the organization having a strategy tied to a mission and vision will be explained, along with how development of the strategic plan leads to business needs. Tools to help identify business needs will be reviewed, including root cause analysis, process modeling and benchmarking. The use of decision analysis and feasibility studies for determining the solution approach will be discussed. The importance of the business case to justify the project investment will be reviewed, including the financial analysis techniques used to evaluate and justify the project.

Who Should Attend

This course will benefit business analysts, executives, project managers and other project personnel involved with the activities to define new projects to meet business needs.

Course Objectives

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

- Explain how the mission, vision and strategy for an organization leads to business needs
- Prepare a process model
- Use the root cause analysis techniques
- Understand the components of a feasibility study
- Assist in the preparation of the business case for a project

Course Outline

Defining Business Needs

- Strategic Analysis Overview
- Importance of Organization Mission, Vision and Strategy
- Strategic Planning, Business Goals and Objectives
- The Road to Projects
- Use of Benchmarking, Root Cause Analysis and Process Modeling to Define Business Needs

Assess Gaps & Determine Solution Approach

- Assessing Strategic Architecture Gaps
- Use of SWOT Analysis
- Solution Approach Process
- Use of Decision Analysis and Feasibility Studies

Define Solution Scope & Business Case

- Solution Scope Definition using Functional Decomposition, Scope Modeling and Vision Statements
- Business Case Components
- Benefit and Cost Assessment
- Financial Analysis Methods using Time Value of Money
- Metrics & Key Performance Indicators

Duration: 3 Hours
Earn: 3 PDUs, 3 CDUs

7-Hr Effective Meeting Techniques

Surveys have shown that over 50% of the project meeting time can be unproductive. The 1-day Effective Meeting Techniques course will teach attendees how to plan and hold productive meetings. Attendees will learn how to establish the purpose and agenda of a meeting, lead and manage a meeting, resolve conflict among meeting participants and handle problem meeting participants. In addition, attendees will learn how to facilitate participants' involvement for specific meeting events such as problem solving, brainstorming and decision making. The course also will discuss proven methods for building a positive meeting climate such as use of a team meeting ground rules, icebreakers, and meeting effectiveness scoring system.

Participants will also learn how to observe meeting participants by focusing on both verbal and non-verbal communication clues. How to prepare effective presentations and hand-outs for meetings will also be covered in this course. Through the use of lecture, role playing and class exercises, participants will learn new meeting management skills that can be easily applied at work. The end result is noticeable - meetings become more focused and efficient, and most importantly lead to improved project results.

Who Should Attend

This course is intended for anybody who is responsible for conducting meetings.

Course Objectives

This 1-day course on Effective Meeting Techniques will cover the critical skills that are needed to prepare and hold effective team meetings. Upon completion of this course, you will be able to:

- Manage meetings and get results
- Reduce the time spent in meetings
- Prepare effective visual aids for meetings
- Prepare an agenda and meeting notes
- Produce decisions supported by meeting participants
- Recognize and deal with problems, conflicts and confrontations during meetings
- Evaluate the effectiveness of meetings
- Manage, deal with and handle conflict, difficult situations and difficult people
- Address issues connected to conducting meetings in a virtual environment

Course Outline

Meeting Fundamentals

- Value of Meetings
- Meeting Types
- Why Do Meetings Fail

Meeting Participants & Issues

- Facilitator
- Recorder/Scribe
- Participants
- Dealing with Problem Participants
- Dealing with Conflict
- Eliminating 'Groupthink'
- Exercise 1: Disruptive Situations

Key Success Factors for Meetings

- Team Ground Rules
- Before the Meeting
- After the Meeting
- Exercise 2: Team Charter

Conducting a Meeting

- Communication Elements
- Questioning Technique
- Effective Listening
- Non-verbal Communication Clues
- Preparing Effective Visual Aids
- Meeting Facilitation and Guidance
- Virtual Meetings

Specific Meeting Types

- Interview
- Exercise 3: Interview Practice
- Focus Group
- Brainstorming
- Problem Solving and Decision Making
- Status Meetings

Duration: 7 Hours
Earn: 7 PDUs, 7 CDUs

7-Hr Effective Personality Style Management Techniques

Knowledge of project management technical skills such as scheduling or budgeting is not sufficient to avoid project failure. Project Managers need well developed soft skills including leadership, conflict resolution and communications. However, Project Managers will not have good soft skills unless they possess emotional intelligence, which is the ability to recognize and manage your feelings and effectively deal with the feelings of other people. Emotional intelligence also includes recognizing how you deal with other people and how you react when under stress. This is your personality style. The successful Project Manager is able to recognize the styles of other project stakeholders. This course will explore how to better understand yourself and others and give you ideas on how to adapt your personality style to improve interactions with project stakeholders. This course will help you improve communications with your project stakeholders and lead to improved project team performance.

Who Should Attend

This course is intended for Program Managers, Project Managers, IT Managers, Business Analysts and anyone else looking to improve interactions and communications with Project Teams and stakeholders.

Course Objectives

This course will cover the critical skills necessary to better understand yourself and others and will give you ideas on how to adapt your personality style to improve interactions with project stakeholders. Topics include a brief review of behavior models, elements of emotional intelligence, the 4-quardant behavior model, identifying and dealing with each style, how each style deals with stress, and flexing your style. This course includes practical exercises and a personal profile evaluation for each participant to determine their style. Upon completion of this course, you will be able to:

- Describe your personality style
- Describe the strengths, weaknesses and reaction to stress for the four basic personality styles
- Explain how to identify the four basic personality styles
- Describe how to flex each style to effectively communicate with other people

Course Outline

Determine Personality Style of Course Participants
Review Key Elements of Emotional Intelligence

- Key traits of effective leaders
- Emotional Intelligence components
- Personality styles defined
- Emotional Intelligence and personality style ties

History of Behavior Models
4-Quadrant Model

- Extrovert versus introvert
- Thinkers versus feelers
- Four basic personality styles defined
- Successful people in each style
- Personality styles - strengths
- Personality styles - weaknesses

Identifying the Style of Other People
Personality Styles under Stress

- Back-up styles
- Tips to avoid back-up styles
- What to do when in back-up style
- What to do when others are in back-up style

Dealing with Each Style

- How to approach each style
- How to flex your style
- The Golden Rule revisited

Duration: 7 Hours
Earn: 7 PDUs

7-Hr Effective Negotiation Techniques

Do you have clients who ask for extras at no additional cost? Do you have problems getting the right resources for your projects? Do your team members consistently miss schedule dates or exceed budgets? Maybe the problem is that you are not an effective negotiator! Most experienced Project Managers typically have good hard skills such as the ability to define scope, budget or schedule, but lack critical soft skills like negotiating. This course will improve your negotiation skills. Why people win in negotiations will be explained along with the key traits of successful negotiators. In addition to explaining a proven process for preparing and conducting a negotiation, this course will cover the frequent mistakes made in negotiations as well as techniques to avoid these mistakes. This course will describe the most common tactics used in negotiations, along with effective countermeasures. Attendees will take part in negotiation exercises to practice the skills covered in this course.

Who Should Attend

This course is intended for portfolio, program and project managers; plus business analysts looking to be more effective in negotiation situations with project teams and stakeholders.

Course Objectives

This course will reference and discuss actual negotiations. Upon completion of this course, attendees will be able to:

- Explain the reasons people succeed in negotiations
- Describe the types of negotiations
- Utilize an effective negotiation process
- Explain how communications and people needs influence negotiations
- Deal with the most common negotiations tactics and countermeasures
- Describe the application of negotiations to conflict situations

Course Outline

Exercise: Team Budget Negotiation

Successful Negotiator Traits

- Aspiration level
- Negotiating Skills
- Cultural Understanding
- Other Key Skills

Types of Negotiations

- Personal Negotiation
- Stakeholder Negotiation
- Compromise Negotiation
- Collaborative Negotiation
- Exercise: Changing the Negotiation Type

Negotiation Process

- Pre-meeting (strategic, administrative, tactical)
- Negotiation meetings
- Post-meeting
- Exercise: Testing Assumptions

Top 10 Negotiation Mistakes & Avoidance Measures

- Low Aspirations / Weak Negotiating Skills
- Making Low Initial Demands
- Making 1st and/or Large Concessions
- Neglecting to Ask Questions
- Providing Too Much Information
- Not Verifying Assumptions
- Reaching a Quick Settlement
- Lacking a Plan
- Losing Focus
- Using Coercive Power
- Exercise: Team Assignment Negotiation

Human Factors in Negotiations

- Communication Influences
- Needs and Goals
- Attitude
- Personality Styles

Common Negotiation Tatics and Countermeasures

- Maneuvers such as Timing, Pricing and Detours
- Techniques such as Concessions, Threats and Deadlock
- Exercise: Change Orders Management
- Negotiations and Conflict Management

Duration: 7 Hours
Earn: 7 PDUs

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PMCentersUSA Instructors and Consultants

Rick Clare, PMP, CBAP, CSM, MSPM is a Partner and the Director of PMCentersUSA. He has more than 30 years of experience as a developer, manager, project manager, business analyst, scrum master and trainer. Rick's earliest career experience was as an Oracle Database developer and instructor, and since transitioning to project management, he has managed many projects in the IT areas of Retail, Healthcare, Banking, Energy, Finance and Compliance. Rick is routinely called upon to present at various national and international events. He was one of the first Certified Business Analyst Professionals (CBAP®) in the world and holds the PMP® and CSM® certifications. He has a master's degree in project management from Northeastern University, teaches there part-time, and is the Principal Agile Instructor for the University.

Larry Dysert, PMP, CCP, CEP, DRMP, FAACE, is a Senior Instructor and Consultant for PMCentersUSA who possesses more than 35 years of experience in project estimating, project controls, cost engineering, and Total Cost Management (TCM) in the chemical, petroleum, oil sands, information technology, manufacturing and construction industries. Larry has developed a specialization in the preparation of conceptual and detailed estimates for capital projects, ranging to over $25B in size, and those involving the use of parametric estimating methodologies. He serves as a management consultant and trainer helping companies apply best practices for estimating, project controls, and project benchmarking. Larry has been responsible for the development of standardized estimating policies and procedures as well as various estimating and cost/scheduling software applications. He is an Honorary Lifetime Member and Fellow of the Association for the Advancement of Cost Engineering (AACE), an international organization accredited by the Council of Engineering and Scientific Specialty Boards (CESB) and dedicated to serving the Total Cost Management community to drive successful project and program delivery. He is the recipient of the AACE Award of Merit and the AACE Total Cost Management Award as well as a frequent presenter and published author on the topics of estimating, project controls, and cost engineering.

Connie Emerson, PMP, CSM, EdD is a Senior Consultant and Instructor for PMCentersUSA with over 40 years of practical experience in Project Management, including projects in engineering and construction, manufacturing, information technology, retail, insurance, and financial services. Connie leverages her experience optimizing project management within organizations through focused training, implementing best practices, coaching project and program managers, and facilitating planning and requirements sessions. Her work includes the creation and optimization of Project Management Office services, along with development of processes and templates. She has provided project plan evaluations, project re-planning support, and process reviews. Connie has supported project managers in the baselining of new initiatives and in the recovery of troubled projects. She has demonstrated skills in the facilitation of team kick-off meetings and work sessions to develop project requirements, product design specifications and comprehensive project plans to ensure project success. Connie has held both full-time and part-time faculty appointments at Northeastern University, Tufts University, Boston University and Nichols College. She is a certified Project Management Professional, a Certified Scrum Master, and a Prosci Change Management Practitioner. She earned her B.S. in Engineering from the University of Delaware, an M.S. in Industrial Administration from Purdue University's Krannert School of Management, and her Doctor of Education degree (EdD) in Organizational Leadership from Northeastern University.

Dr. Derex Griffin, PMP, PgMP, PfMP, CSM, MBA is a Senior Consultant and Instructor for PMCentersUSA with more than 23 years of experience. He has managed large-scale projects from requirements identification to closing with demonstrated success ensuring adherence to requirements and on-time completion within budget. Dr. Griffin has 30 years of experience as an Air Force Officer. He has served as a consultant for the US Department of Defense where he advises on project portfolio strategy. Dr. Griffin also has experience working with US Customs and Border Protection as a PMO Acquisition Strategist where he held accountability for building executive-level briefs supporting programmatic gate reviews and executive oversight, as well as for overseeing resource leveling, schedule compliance, scope definition, acquisitions and systems sustainment, and cost performance. Dr. Griffin serves as a professor for the Ira A. Fulton Schools of Engineering at Arizona State University where he teaches information technology project management. He has provided instruction to PMI's Baltimore, MD chapter since 2018 and has prepared individuals to sit for the PMI Project Management Professional (PMP)® certification exam. Dr. Griffin holds a B. S. degree in Industrial Engineering Technology and a B.A. degree in Computer Programming from Southern Illinois University and Louisiana Tech University, respectively. He holds an MBA in Business Information Systems from Texas A&M University and a Doctor of Business Administration, Quality Systems Management from The National Graduate School of Quality Management in Falmouth, MA. Dr. Griffin earned a Master's degree in Military Operational Art and Science from the Air Command and Staff College at Maxwell Air Force Base.

Sharyn Hardy, PMP, MBA, EdD, is a Senior Instructor and Consultant for PMCentersUSA with over 17 years of experience delivering Project Management training and over 10 years of experience managing a diverse array of projects. She is a business leader and innovator with expertise in education technology, business management, and leading software product and project management. Sharyn designed and led a $1M program for the capture, integration, and reporting of real estate data worldwide. The program included 8 applications, including SAP, a data warehouse and PeopleSoft, and it lowered operating costs by millions of dollars. She has performed Business Analysis, Project and Product Management, Training and Support functions and has worked with cross-functional teams (HR and Finance) to ensure proper integration of business operations and controls. As Director of Product Development for Navipath in Andover, MA, she directed a team of program managers and developers in creating/maintaining custom e-commerce products and developed training plans for the division's staff. Her contributions have included creating the product roadmap and launch plan for an edtech company and managing the creation of a portal specific to veterans under a contract with Massachusetts Technology Collaborative. In 2002, Sharyn began serving as an Adjunct Instructor and Consultant for various colleges and business schools including: Merrimack College, Boston University Corporate Education, Hult International Business School, Harvard University Extension School, and Northeastern University. She has led training In Project Management, Finance for Non-Finance Professionals, Business Communication, and other courses along with delivery of PM seminars aligned with the PMI® PMP® certification program standards. Sharyn holds an MBA degree with a Finance concentration from MIT's Sloan School of Management, a Doctorate in Education EdD with a focus on Higher Education, Finance and MIS from the University of Massachusetts at Lowell, and a bachelor's degree in Finance and Business Management from Simmons College in Boston.

PMCentersUSA Instructors and Consultants (continued)

Peter Johnson, CBAP, is a Senior BA Instructor and Consultant who brings over 30 years of experience to the classroom. As a senior consultant for a state government project, he developed the business case for a year-long Feasibility Study that aligned business needs with technical alternatives. For another, he managed the solution and transition requirements for an extensive array of systems interfaces between public agencies. Peter understands the dynamic nature of organizations as well as the evolving role of the business analyst as an agent of change. He draws out the challenges that students face and encourages discussion to help make business analysis more tangible and effective. Peter is among the first Certified Business Analysis Professional (CBAP®) to recertify after three years. He is a founding member of the New Jersey chapter of the IIBA® and has previously served as its Vice President for Professional Development. He has been a featured speaker at several IIBA® chapters around the world.

Timothy J. Lowe, PhD, is a Senior Instructor for PMCentersUSA and is the Chester Phillips Professor of Operations Management at the Tippie College of Business, University of Iowa. He has teaching and research interests in the areas of supply chain management and operations management. He received his BS and MS degrees in Engineering from Iowa State University and his PhD in operations research from Northwestern University. Additionally, he has published more than 80 papers in leading journals in his field. Professor Lowe has worked as a project and process engineer for the Exxon Corporation and has served on the faculties of the University of Florida, Purdue University, and Pennsylvania State University. At Purdue, he served as the Director of Doctoral Programs and Research for the Krannert Graduate School of Management.

Joe Lukas, PMP, CSM, PE, CCP, is the Vice President Emeritus and a Senior Consultant/Instructor for PMCentersUSA, and has more than 30 years experience in project management and business analysis spanning numerous industries including manufacturing, product development, information technology and construction. Joe also has program and portfolio management and international projects experience. His recognized areas of expertise include scheduling, earned value analysis, risk management, and interpersonal skills such as personality styles. Joe has been a member of the Project Management Institute since 1985 and earned his Project Management Professional (PMP)® certification in 1992. With over 30 published articles on various project management topics, Joe is a frequent guest speaker for companies and organizations across the county. Joe has been a guest instructor on project management for many universities including the University of Pittsburgh, Stevens Institute, the State University of New York (SUNY) at Brockport, St. John Fisher College and the Rochester Institute of Technology (RIT). Joe graduated with a B.S. in Chemical Engineering from Syracuse University, and holds a Professional Engineer license. Joe is also a noted Certified Cost Engineer (CCE) for the Association for the Advancement of Cost Engineering (AACE).

Joseph Nuzzo, PgMP, PMP, PMI-SP, PMI-ACP, SA, POPM, SPC is a Senior Instructor and Consultant for PMCentersUSA. Joe has been an instructor for several Pittsburgh area colleges and universities teaching undergraduate, graduate, and professional development courses. For more than 8 years, he also has prepared professionals to sit for the Project Management Professional (PMP®) certification exam. He is a PMI Authorized Trainer for the PMI PMP Exam Prep course introduced in 2021. Joe has nearly 20 years of program management, project management, and leadership experience delivering software and IT solutions in the healthcare industry. Among his many certifications, he holds the PMI Scheduling Professional (PMI-SP®), and Program Management Professional (PgMP®) as well as several certifications from Scaled Agile, Inc. including the SAFe Agilist, SAFe Product Owner/Product Manager and the SAFe Program Consultant. Joe holds a Bachelor of Science degree and an MBA from the University of Pittsburgh.

Jack Rearick, PMP, CSM, is an Instructor and Consultant for PMCentersUSA. He has over 40 years of experience in IT project management and consulting across various industries including manufacturing, health care and financial services. Jack's wealth of knowledge stems from a progressive career involving programming, management of a help desk, leading projects, and establishing an IT Project Management Office (PMO) along with its methodology/processes. Jack is well-known for his effective leadership skills and his expertise in team building, mentoring, group facilitation, process development and training. He has served on the Pittsburgh PMI Chapter's Financial Services SIG and Corporate Outreach Committees and has leveraged his learnings to present seminars on the topics of Portfolio Management and Compression Planning.

Solomon Thompson, Jr., a senior consultant and instructor for PMCentersUSA, has over 30 years of experience in technology transformations with expertise in the facilitation of Agile Transformation in highly regulated industries including financial institutions and the federal government. Mr. Thompson has transformed organizations through the administration of maturity assessments, training in Agile methodology and engineering practices, organizational design, and leadership. Known for his excellent interpersonal skills, Solomon is an expert at quickly establishing trust and helping organizations create the team and communication constructs to increase business agility through coaching at the team, program, portfolio and executive levels. His ability to approach engagements with a solid foundation stems from his background in crucial roles he has held in his career including system analyst, system architect, lead designer, lead developer, and project manager. Solomon holds a Bachelor's in Electrical Engineering from the University of Pennsylvania and a Master's in Management Information Systems from City College of New York. His certifications include Enterprise Business Agility Strategist, Agility Transformation Coach, SAFe 4.0, and Scrum Master.

Richard E. Wendell, PhD, is both a Senior Faculty Instructor for PMCentersUSA and a Professor of Business Administration at the University of Pittsburgh's Joseph M. Katz Graduate School of Business. With more than 30 years of experience in operations research, decision theory and technology, and process and project management within industry and academia, he has considerable experience in executive and professional development education in the United States and internationally. Professor Wendell's research has focused on utilizing decision technologies to deal with complex situations involving risk management, multiple objectives, and project speed-up decisions. In addition to his academic duties, he has served as a consultant to numerous financial, utility, manufacturing, and banking firms. Professor Wendell has authored and co-authored more than 50 articles on decision technologies and co-authored a PMCentersUSA's course. He received his Bachelor of Science and Master of Science degrees in Industrial Engineering from the University of Pittsburgh and his PhD in Operations Research from Northwestern University.

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