

## Advanced Management Program

### Overview

The Advanced Management Program is one or two-week fully customizable Leadership and Management course targeting mid to senior level managers. Our standard array of classes are set up to accommodate our most requested topics but they are interchangeable to suit client's needs.

### Leadership

Performance Leadership Workshop  
Leading for Optimal Performance  
Leadership and Strategic Thinking  
Leading 21st Century Change

### Business Competencies

Ethical Dilemmas  
Influencing Others  
Leadership and Decision Making  
Lean Six Sigma: Developing and Implementing a Lean Plan

### Management and Human Relations

Conflict Resolution: Building High Performance Work Teams  
Peer Consultation Workshop  
Teams that Work! Build Relationships, Rapport, and Connect

## Performance Leadership Workshop

### Overview

Performance Leadership is a model for developing people and talent. It is a way for leaders to help the people they work with grow and ultimately become Peak Performers.

The Performance leader understands to adapt their own leadership style accordingly based upon the developmental level of the people they manage. This diagnostic approach to leadership allows for a much more effective means to accomplish organizational and personal goals as well as helping yourself and others reach professional development objectives. Participants will learn through a variety of learning medium including; Leader self-inventory, interactive experiential based training, role play, video review, case study analysis, and facilitated group discussions. The objective of this dynamic workshop is to enhance the abilities of the leader to properly diagnose

the performance level of the employee and prescribe the most appropriate leadership style for maximum effectiveness. The workshop will also focus on strategies to develop employees through career development planning, goal setting, and face to face counseling.

#### **Course Objectives:**

- Open up communication in order to increase the frequency and quality of conversation about performance and development between you and the people you work with
- Help others develop confidence and commitment
- Lessons from Colonel Joshua Chamberlain of the 2nd Maine-“The Lion of the Round Top”
- Teach others to provide their own direction and support
- Value and honor differences
- Diagnose others development level and choose appropriate leadership style
- Know why there is no best leadership or coaching style
- Learn common language for coaching and developing others

### **Conflict Resolution: Building High Performance Work Teams (A People Reading Workshop)**

#### **Overall**

The foundation of personal and professional success lies in understanding yourself, understanding others, and realizing the impact personal behavior has on others. The Everything DiSC Profile is a multi-purpose learning instrument that helps individual's asses to what degree they utilize each dimension of behavior in a situation. Used by many Fortune 500 Companies, HR professionals, consultants, coaches, trainers, government agencies, sales firms and educational institutions. Everything DiSC Profiles helps these clients:

- Build productive teams
- Develop effective managers, supervisors, leaders
- Improve customer service
- Ease frustration and interpersonal conflict
- Enhance communication
- Conflict management resolution
- Team development and team building
- Improve personal diversity awareness and recognition
- Improve the bottom line; productivity
- Assist in hiring, recruiting, placement, promotion, outsourcing
- Change management, Quality enhancement
- Managing, counseling, coaching

### Course Objectives

- Discover behavioral strengths, areas for augmenting, blending, capitalizing
- Value and learn to respect the strengths of others
- Deal with conflict effectively by learning adaptive behaviors
- Enhance work group with teamwork and minimize team conflict
- Develop strategies to meet diverse needs of others
- Improve communication skills by determining communication styles
- Increase sales skills and understanding of the prospect, client, customer with people reading
- Improve customer relationships by identification and meeting needs
- Reduce conflict and stress, in interpersonal relationships
- Manage interpersonal communication better

## Leading for Optimal Performance

### Overall

Effective Supervisors and Managers are capable of leading and influencing those within their command to attain the goals and objectives of the organization. This one-day workshop will provide an overview of proven strategies to implement change initiatives within your organization as well as some guidance in effectively motivating employees who may have become beat up, drawn out, and cynical. This interactive course addresses various leadership styles, skills, and strategies to enhance the knowledge, skills and attitudes of the employee for maximum performance. Leading and influencing can be accomplished at all levels within any organization and is the foundation for our leadership philosophy; “Leadership at all Levels”

### Course Objectives

- Creating an Empowering Organization
- Learning to “Cross the Line”
- 360-degree Leadership; Leading from the Middle
- Adaptive Leadership styles/ “Diagnose Before You Prescribe”
- Focusing on the Organizational Spirit
- The Power of a Belief System - Beliefs Drive Performance and Behaviors
- Organizational/Personal Goal Setting
- Creating a Vision
- The eight-step process for leading organizational change initiatives
- Overcoming Adversity

## Negotiation and Influencing Others

### Overall

Business today is largely run by teams and populated by authority-averse baby boomers and Generation Xers. That makes persuasion more important than ever as a managerial tool. But contrary to popular belief, author Jay Conger (director of the University of Southern California's Marshall Business School's Leadership Institute) asserts, persuasion is not the same as selling an idea or convincing opponents to see things your way. It is instead a process of learning from others and negotiating a shared solution. To that end, persuasion consists of these essential elements: establishing credibility, framing to find common ground, providing vivid evidence, and connecting emotionally. Credibility grows, the author says, out of two sources: expertise and relationships. The former is a function of product or process knowledge and the latter a history of listening to and working in the best interest of others. But even if a persuader's credibility is high, his position must make sense--even more, it must appeal--to the audience. Therefore, a persuader must frame his position to illuminate its benefits to everyone who will feel its impact. Persuasion then becomes a matter of presenting evidence--but not just ordinary charts and spreadsheets. The author says the most effective persuaders use vivid--even over-the-top--stories, metaphors, and examples to make their positions come alive. Finally, good persuaders have the ability to accurately sense and respond to their audience's emotional state. Sometimes, that means they have to suppress their own emotions; at other times, they must intensify them. Persuasion can be a force for enormous good in an organization, but people must understand it for what it is: an often-painstaking process that requires insight, planning, and compromise.

### Course Objectives

- Understand essential elements of persuasion
- Understanding how to sense and respond to your audience

## Leading Change in the 21<sup>st</sup> Century

### Course Objectives

- Recognize non-tangible leadership traits demonstrated by successful leaders
- Describe techniques leaders use to develop a culture of accountability and responsibility
- Discuss methods leaders use to align and motivate diverse teams to collaborate toward a common goal
- Leverage the strengths of virtual and matrix teams to create a powerful cohesive working group
- Understand how a leader's weaknesses can become a strength

## Leadership and Decision Making

### Overview

Business today is largely run by teams and populated by authority-averse baby boomers and Generation Xers. That makes persuasion more important than ever as a managerial tool. But contrary to popular belief, author Jay Conger (director of the University of Southern California's Marshall Business School's Leadership Institute) asserts, persuasion is not the same as selling an idea or convincing opponents to see things your way. It is instead a process of learning from others and negotiating a shared solution. To that end, persuasion consists of these essential elements: establishing credibility, framing to find common ground, providing vivid evidence, and connecting emotionally. Credibility grows, the author says, out of two sources: expertise and relationships. The former is a function of product or process knowledge and the latter a history of listening to and working in the best interest of others. But even if a persuader's credibility is high, his position must make sense—even more, it must appeal—to the audience. Therefore, a persuader must frame his position to illuminate its benefits to everyone who will feel its impact. Persuasion then becomes a matter of presenting evidence—but not just ordinary charts and spreadsheets. The author says the most effective persuaders use vivid—even over-the-top—stories, metaphors, and examples to make their positions come alive. Finally, good persuaders have the ability to accurately sense and respond to their audience's emotional state. Sometimes, that means they have to suppress their own emotions; at other times, they must intensify them. Persuasion can be a force for enormous good in an organization, but people must understand it for what it is: an often-painstaking process that requires insight, planning, and compromise.

### Course Objectives

- Define the four essential elements of persuasion
- Apply the four essential elements of persuasion during classroom exercises

## Lean Six Sigma: Developing and Implementing a Lean Plan

### Overall

The U.S. Navy Aircraft Intermediate Maintenance Depot (AIMD) Lemoore Power Plants Division (F404 engine maintenance) was a real mess. Not-Ready-For-Issue parts were everywhere; the backlog was depressing (35 engines and 190 modules awaiting maintenance); there were 30 F/A-18 aircraft with bare firewalls (no engines); the maintenance crews were working 12-hour days; manning was at 61% of authorized levels; reenlistment rates were an abysmal 50%, and crew morale was lousy. Time on Wing for the engines repaired by the AIMD was significantly below the original specification. As if all of that wasn't enough, more parts and engines arrived daily. The newly appointed Officer-in-Charge of the Lemoore AIMD had worked in commercial aircraft facilities and she understood quickly that the situation at her new assignment was dysfunctional. She knew that something needed to be done and she decided to use Lean manufacturing to tackle the challenge. It would be the first application of the Lean concept to Naval Aviation.

### Course Objectives

- Understand how to identify and set appropriate metrics to measure performance.
- Understand the process by which change is managed.
- Introduce the concepts involved in Lean manufacturing.
- Understand how to identify excess capacity, and how managers assess the alternatives available as they deal with excess capacity.
- Appreciate the value of a 'New Look' attitude and consider how that attitude can
- Appreciate the value of a 'Navy Enterprise' attitude and consider how that attitude can be fostered individually and as a team.

### **Teams that Work! Build Relationships, Rapport and Connect**

#### Overall

Building positive connections, enhancing emotional intelligence and transforming interpersonal skills will boost your bottom line in many ways. You will retain employees, improve morale, get things done, build better teams, enhance managers and leaders effectiveness; improve customer service, win new customers, close more sales, increase job satisfaction and get customers and co-workers singing your praises. This program is based on the book, "Get Along with Anyone, Anytime, Anywhere ... 8 Keys to Creating Enduring Connections with Customers, Co-Workers, Even Kids" by Arnold Sanow and Sandra Strauss. We focus on the following topics:

#### Course Objectives

- Enhancing Working Relationships and Teamwork
- Building Cooperation, Likeability and Trust
- Understanding and Adapting to Different Communication Styles
- How to Communicate in a Clear, Concise and Understandable Manner
- How to Avoid Misunderstandings
- Becoming a Better Listener
- Eliminating Insensitivity, Rudeness and Incivility
- Dealing with Difficult People
- Banishing Words that Destroy Relationships
- How to Say No and Give Feedback in a Nice Way
- Understanding Body Language
- Reducing Anger
- Making Every Meeting, Interaction and Transaction Positive, Memorable and Special
- Promoting a Positive, Productive and Profitable Organization

## FAR Part 31: Cost Principles

### Overview

This course reviews the cost principles applicability to the various contract types and procurement methods of the government. This course also addresses the current areas of audit scrutiny by the government and methods of complying with the regulations including business systems and disclosure requirements.

### Course Objectives

- Recognize the types of allowable contract cost includable in estimates, proposals and invoices to the prime contractor or government
- Analyze cost allocability and reasonableness under the cost principles and CAS
- Identify the types of cost or activity under scrutiny from government auditors or those that may require an advance agreement to be considered allowable
- Recognize accounting methods and systems for accumulating and reporting cost, including expectations for policies, procedures and training
- Analyze the accounting documentation, record retention requirements and auditor access to both budgeted and incurred cost

## Government Contracting Fundamentals

### Overview

The Government Contracting Fundamentals course is a comprehensive, three-day overview and discussion of the federal government contracting process, including applicable procurement laws, regulations, and practical requirements. For those who are new, relatively inexperienced, or require a supervisory understanding of government contracting, this course provides an overview that will familiarize the attendee with the federal contracting process, provide a strong foundation on which to build greater subject-matter expertise, and dispel common myths and misunderstandings. For those with some experience, the course will heighten knowledge, provide context, sharpen issue awareness, and improve the ability to operate successfully in this highly complex and competitive field. This “fundamentals” course is designed to be of benefit to both government and contractor personnel, including contracting officers, contract and subcontract administrators, program and item managers, finance and accounting personnel, engineers, and attorneys (in-house, outside, government).

### Course Objectives

- Understand the major differences between government and commercial contracting.
- Understand the principle laws and regulations that affect the federal procurement environment.
- Become familiar with the major components of the Federal Acquisition Regulation (FAR) and Cost Accounting Standards (CAS).
- Understand the government's legal environment and the players on the government's contracting team.

- Understand the different contract types, and their associated opportunities and risks.
- Understand competition alternatives, including full and open competition, set-asides, and sole-source procurements.
- Explore various procurement methods and discuss the processes affiliated with each, including competitive negotiations, sealed bidding, simplified acquisition, and federal supply schedules.
- Identify multiple types of compliance requirements, audits, and reviews, and the associated penalties for non-compliance.
- Recognize the components of a typical government contract and discuss the use and applicability of specific contract clauses, including inspections, changes, terminations, delays, and disputes

## GSA Schedule Contracting

### Overview

Obtaining, managing and understanding a GSA or VA Schedule contract takes specialized knowledge and dedication. For instance, do you know what your Basis of Award customer is? If you don't, this course is definitely a must for you. GSA Schedule contracts are an integral part of any company's federal business strategy. This intensive one-day course provides an overview of the program, current government market trends and other knowledge you need to succeed. It is especially designed for executives, managers, and general counsels involved in federal government business.

The course alerts you to key risks and presents solutions and time-honored best practices. Budget trends, marketing tips and other information important to growing your business are also included. The program is suitable for lawyers and non-lawyers within and outside the United States.

### Course Objectives

- Analyze the structure of a GSA Schedule contract and distinguish myth from reality of GSA Schedules
- Identify the key contractual, regulatory, and statutory requirements that apply to GSA Schedule contractors
- Analyze the risks of non-compliance
- Obtain information on federal budget trends
- Learn best practice marketing and compliance tips by studying what has worked for other successful Schedule contractors

## Leading Practices in Cost Estimating and Accounting

### Overview

This course examines the leading practices for adequate accounting and estimating systems. It also provides recommended approaches to achieving, maintaining, and documenting execution of internal accounting and estimating system controls and behaviors to comply with government contract requirements. This two-day class covers sound business practices in accounting and estimating.

### Course Objectives

- The nature and intent of accounting and estimating system compliance requirements
- Inter-relationships between accounting and estimating systems
- The nature and intent of business system internal controls
- Indicators of control risk/vulnerability and potential noncompliance in accounting and estimating systems
- The adequacy qualities and significant compliance issues related to accounting and estimating systems and internal controls

## **Navigating the FAR: Practical Applications**

### Overview

This fast-paced interactive course examines the organization, content, policy and procedures of the Federal Acquisition Regulation (FAR) as it applies to Federal acquisition. Designed for new professionals in both government and industry, as well as more experienced professionals, to build or update their familiarity with the Federal Government's procurement system. The course includes a review of the topical divisions of the FAR, exercises to help the participant find and analyze FAR contracting issues, and group activities to reinforce the application of FAR principles.

### Course Objectives

- Identify the foundations, organization, and principles of the FAR.
- Learn to “navigate” the FAR in order to understand, interpret and use it in executing business transactions.
- Analyze the purpose of the policies, processes and procedures set out in the FAR to better understand the constraints on, and the latitude available to, government procurement officials.
- Increase professional understanding of the acquisition system.
- Build skills to train, mentor and coach others using the FAR.
- Improve participant's ability to add value through their role in the acquisition process.

## **Negotiating Strategies and Techniques**

### Overview

This course is divided into two parts. The first part is designed to provide attendees with a thorough understanding of the qualities of an effective negotiator, with examples rooted in the government contracting process. The second part focuses on the negotiation process itself—the preparation stage, the actual negotiation, and the techniques for ensuring that the deal is closed once and closed correctly. Class discussion and case studies underscore the importance of the principles covered in the lecture.

### Course Objectives:

- Recognize the traits that make an effective negotiator
- Apply the principles taught in the program to your own negotiations
- Determine effective negotiation practices
- Identify different agenda approaches that can be used to meet your goals
- Recognize and defeat strategies being used against you
- Analyze the human element of a negotiation, often the most important element

## Organizational Conflicts of Interest

### Overview

This Organizational Conflicts of Interest (OCI) course will provide an in-depth analysis of both OCI theory and OCI practice. The course will begin by analyzing different types of OCIs, regulatory provisions in the FAR and DFARS, and the obligations of both government and contractor as defined by the extensive and evolving case law from the GAO and courts. The next part of the course will be unique- it will provide practical, hands-on guidance to contracting personnel (and counsel who advise and assist them) so that they can understand and address OCI issues in order to maximize business opportunities, make wise business choices, and avoid wasting Bid and Proposal resources on lost causes. Similarly, this guidance will be invaluable to government agency procurement officials who want to understand how they can identify and resolve OCIs. The workshop will provide examples, case-based discussion scenarios, and take-home materials that contractors can adapt and use.

### Course Objectives

- Recognize the three types of organizational conflicts of interest and why they are important
- Identify requirements imposed by current FAR and DFARS regulations
- Analyze existing case law, with a resource to find more detailed information
- Identify potential organizational conflicts of interest with respect to both existing procurements and potential future procurements
- Identify and mitigate potential organizational conflicts of interest
- Adapt resources in order to mitigate potential organizational conflicts of interest
- Analyze how related areas of the law affect organizational conflicts of interest

## Preparing Compliant Proposals

### Overview

This two-day course walks through the proposal preparation process. This includes work done prior to a customer issuing a request for proposal through contract award. It focuses on the importance of ensuring integrity between the technical, management and cost volumes of the proposal and the

processes necessary to make that happen.

The estimating process, a significant component of the proposal preparation process, is one of the business systems specifically addressed by the Department of Defense Supplement to the Federal Acquisition Regulation. This course addresses each of the specific components of an acceptable estimating process must meet. The existence of a compliant estimating system will help maximize the likelihood an auditor will find the company's proposal adequate. Even if a company does not do business with the Department of Defense, it is important that cost estimates meet the criteria in DCAA's adequacy checklist.

The course also presents techniques for gathering data, developing and documenting sound basis of estimates, and cost and price analysis techniques to support cost estimates for direct material and subcontractors— a particularly troublesome area.

The course also covers the importance of time management and writing in the context of proposal preparation.

### **Course Objectives**

- Preliminary work before the customer request for proposal.
- Reviewing the customer's request for proposal.
- Using the work breakdown structure.
- Selecting subject matter experts for technical inputs.
- Templates and formats for gathering resource requirements.
- Writing techniques for clarity and comprehension— avoid the “great solution but no one understands it” dilemma.
- Proposal review techniques

## **Protests: Process and Strategy**

### **Overview**

This course will address topics of interest to both contractor and government personnel. Designed for lawyers, contracting professionals, and anyone else involved in the acquisition process to better understand the protest system, as well as best practices in planning to file or defend a protest.

### **Course Objectives**

- Learn about protecting protest rights and deciding whether to protest:
- The debriefing processes
- Potential protest issues
- Selecting a forum
- Timeliness and stay issues

- Understand what to expect during the protest itself:
- Protective orders
- The role of outside counsel
- The role of interveners
- Protest timelines
- Supplemental protests
- Hearings
- Understand the outcomes of protests:
- Voluntary corrective action
- Types of relief based on a decision
- Combining GAO and COFC remedies
- Corrective action process issues

## Surviving a DCAA Audit

### Overview

This one-day course provides an overview of the government contract audit function, DCAA audit expectations regarding adequacy of accounting systems, labor timekeeping and cost accumulation, and cost representations for forward pricing, billing, and incurred costs are covered. The course also addresses strategies for addressing controllable audit risk/vulnerability factors and preparing for and handling issues that arise during contract audits. This course is recommended for those individuals responsible for contract audit related issues and preparing input or information that is subject to audit review.

### Course Objectives

- DCAA general expectations for government contractors
- Government contracting basics including acquisition regulations content, contract types, and roles and responsibilities of acquisition officials
- DCAA expectations regarding the adequacy of accounting systems, labor timekeeping, and cost accumulation
- DCAA audit risk assessments and quality of audit evidence
- FAR Part 31 Cost Principles and Cost Accounting Standards
- Truth in Negotiations Act requirements and price proposal audits
- DCAA audits of incurred costs and business systems
- Strategies for audit risk management

## Accounting and Auditing for Government Contracts

### Overview

This course is designed to help contractors navigate the details of these requirements so that they can successfully recover all allowable and allocable contract costs incurred in support of their contracts. This course will also prepare contractors for the accounting requirements of government contracts and identify strategies in preparing for audits. Instructors provide real life examples of the challenges associated with the existing

accounting and audit environment. Whether your company is new to government contracting or has been in the business for years, this course will be valuable to ensure that you are up to speed with these ever-changing requirements and prepared for the audit requirements to come as a result of these contracts.

### **Course Objectives**

- Identify basic accounting terms and procedures required for government contracts
- Identify and discuss Federal Acquisition Regulations related to the determination of the allowability, allocability, and reasonableness of costs
- Identify contract types and different interim financing methods
- Identify revenue recognition methods unique to government contracts
- Identify special reporting requirements
- Distinguish competitive vs. non-competitive procurements
- Government contractor system expectations– accounting, estimating, timekeeping, and purchasing
- Determine the current audit environment through an overview of DCAA
- Examine the incurred cost submission and audit approach including penalties for unallowable costs

## **Advanced Contract Administration**

### **Overview**

This course focuses on all of the aspects of contract administration. It is intended to expand on the working relationship between government employees and the contractor. We address the rules governing: the interpretation of contract language, the allocation of risk between the parties, the application of the major contract clauses, the negotiation of price adjustments, and the submission of requests for equitable adjustment and claims. Students will learn the fundamental legal principles the courts and boards of contract appeals apply in interpreting the major clauses that impact contract administration.

### **Course Objectives**

- Identify constructive changes
- Identify excusable delays and suspensions of work
- Learn the rules governing inspection, acceptance, and warranties
- Identify the grounds for default termination
- Learn the rules governing terminations for convenience
- Determine how to price adjustments
- Learn the rules governing payment and discharge

## Advanced Source Selection

### Overview

This course focuses on the Competitive Negotiation and Source Selection processes outlined in FAR Part 15, examining the challenges, issues, and processes encountered in conducting a formal source selection and responding to a Request for Proposal. This course is highly interactive, using case studies from the Government Accountability Office (GAO) and the Federal Court of Claims. Interactive team exercises are for participants to practice in RFP and evaluation factor development.

This course is appropriate for both government and contractor personnel, whether a new or seasoned professional, including contracting officers, contract and subcontract administrators, program managers, finance and accounting personnel, engineering personnel and anyone who participates in the source selection process.

### Course Objectives

- Review and understand the Federal Government's formal source selection process
- Identify and discuss source selection issues and difficulties
- Identify the various strategies that are available to achieve the most effective source selection and “best value” awards
- Practice developing evaluation factors and the evaluation process
- Compare and contrast government and industry perspectives
- Demonstrate methods to reduce the potential for protests
- Improve ability to compete and the opportunity for successful awards

## Best Practicing in Subcontracting

### Overview

Successful prime-sub relationships are often the key to profits in government contracting. This two-day course is designed to provide a comprehensive and practical discussion of prime-sub contracts, teaming agreements, and joint venture arrangements best practices. In this class you will learn who the players are and their roles, strategies and factors to consider in choosing a team, and understanding each party's role in working to win a contract. In addition, this class focuses on the importance of how the team is structured and the importance of a non-disclosure agreement, drafting teaming and JV agreements and hazards to avoid, negotiating and finalizing the subcontract, and dealing with flow downs as is addressed in practical terms.

### Course Objectives

- Understand who the players are and what are their roles
- Identify strategies and factors to consider in choosing a team
- Learn the importance of a non-disclosure agreement
- Understand how to structure the relationship: Prime, Sub, or JV
- Understand the role of a teaming agreement
- Learn how to draft a teaming agreement
- Learn how to draft a JV agreement
- Learn how to negotiate and finalize the subcontract
- Understand how to deal with flow downs
- Learn how to handle disputes

### CAS Cost Impacts

#### Overview

This two-day course provides students with a comprehensive learning experience on what constitutes a cost accounting practice (CAP) change and what constitutes a noncompliance. Students will learn the requirements for preparing cost impact proposals, including General Dollar Magnitude Proposals and Detailed Cost Impact Proposals. The course includes a focus on how to compute increased and decreased costs by contract, by contract group, and in the aggregate and a discussion of the various methods for resolving CAS cost impacts. In addition to course instruction, the student will complete numerous practical exercises and two comprehensive case studies (one for a CAP change and one for a noncompliance). This course is a must for anyone that is involved in determining the cost impact of a change in cost accounting practice and/or a noncompliance.

#### Course Objectives

Upon completing this course, the student will be able to determine whether a contractor has complied with any/all of the Cost Accounting Standards (CAS) cost impact statutory and regulatory requirements, including the following:

- Given a scenario, the student will be able to identify the impact the various types of cost accounting practice changes or CAS non-compliances have on Government contracts
- Given a scenario, the student will be able to prepare an adequate and compliant cost impact proposal
- Given a scenario, the student will be able to provide advice to the client as to the most advantageous method for resolving the cost impact

## Contract Changes and Equitable Adjustments

### Overview

This course focuses on the central role the Changes clause plays in the performance of government contracts. It addresses the use of the clause in ensuring the government achieves its goals during contract performance. The use of the clause by contractors to assert requests for equitable adjustment when the conditions of performance change, the myriad of rules governing the negotiation of equitable adjustments, and the process of modifying the contract to accomplish these goals are covered.

### Course Objectives

- Identify constructive changes.
- Identify excusable delays and suspensions of work.
- Learn the rules governing inspection, acceptance and warranties.
- Identify the grounds for default termination.
- Learn the rules governing terminations for convenience.
- Determine how to price adjustments.
- Learn the rules governing payment and discharge.

## Cost Accounting Standards

### Overview

The Cost Accounting Standards (CAS) was designed to promote uniform and consistent methods of accounting practices for contractors. This course explains to which contracts and contractors the Standards are applicable and highlights the current and proposed exemptions to the Standards. Discussions include the requirements of all 19 Standards, the differences in accounting as compared to GAAP and IFRS, and methods of structuring your accounting system for compliance. The administrative requirements, including preparation of the Disclosure Statement, and post award contract adjustments due to changes in accounting practices are also covered.

### Course Objectives

- Identify when the Cost Accounting Standards are applicable and when a Disclosure Statement is required.
- Distinguish the differences between “modified” and “full” CAS coverage and to which contracts and subcontracts the Standards apply.
- Recognize the fundamental requirements and techniques of application for the Standards.
- Assess accounting system designs for compliance with the Standards.
- Appraise administrative requirements for changes to accounting practices and fundamentals of the General Dollar Magnitude and Detailed Cost Impact.
- Prepare the CASB Disclosure Statement.

## Cost and Price Analysis

### Overview

Course participants will learn regulatory requirements and expectations related to cost and price analysis. Additionally, how and when to perform and document price analysis, how and when to perform and document cost analysis, and how and when to request performance of and incorporate results of a technical analysis. Participants will also learn how to document source selection, including justification for single/sole source acquisitions and related negotiations. This course consists of practical techniques for analyzing the reasonableness of proposed pricing and costs and documenting the results of the analysis.

### Course Objectives

- Identify cost and price analysis requirements and techniques for U.S. Government contracts and subcontracts
- Understand Regulatory requirements and expectations related to price and cost analysis
- Know when to perform and document price analysis
- Know when to perform and document cost analysis
- Know when to perform and incorporate technical analysis
- Learn to document source selection including justification for single/sole source acquisition

## Ethics and Compliance

### Overview

Legal and ethical conduct is the way to protect your credibility and earn the respect and trust of your employees, partners, clients, and community. This one-day course provides an in-depth understanding of the ethical and compliance rules that apply in the federal government marketplace. It emphasizes the importance of ethical conduct when contractors do business with the federal government; enable contractor (and government) employees to recognize compliance and ethical issues and traps before they make irreparable mistakes; and advise about support resources.

### Course Objectives

- Understand the ethical and compliance rules that apply in the federal government.
- Identify the importance of ethical and compliant conduct when doing business with the federal government.
- Recognize compliance rules, ethical issues and traps before irreparable mistakes are made.
- Identify and be able to use support resources.

# Earned Value Management Systems (EVMS)

## Incorporate Best Practices for Program and Project Management Systems

The EVMS processes incorporate best practices for program and project management systems that require strong applications for program or enterprise planning and control.

The processes include integration of program scope, schedule, and cost objectives, establishment of a baseline plan for accomplishment of program objectives, and use of Earned Value Management techniques for performance measurement during the execution of a program EVMS provides a solid platform for risk identification, corrective actions, and necessary management replanning.

The emphasis of this course is on the latest EVMS principles and concepts in accordance with changes and guidelines for Earned Value Management in *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*. These concepts may be applied to any project, whether government or commercial.

### Prerequisites

Participants should have a working knowledge of general project management principles and some familiarity with the concept of Earned Value

### Course Level

Intermediate/Advanced

### Who Should Attend

- All program managers, project managers, and project team members who need to apply EVMS criteria to current or future contracts, whether commercial or governmental
- Technical staff who are involved in Integrated Baseline Reviews or Earned Value reporting

- All program managers, project managers, and technical staff applying Earned Value as an integral part of fixed asset planning
  - Members of the Project Management Office interested in establishing the best and most current EVMS processes
  - Program or project managers who need to apply EVMS as a risk assessment and management tool
- Performance Focus**
- Obtaining the knowledge and understanding needed to properly implement EVM within your organization

### What You Will Learn

You'll learn how to:

- Develop a project baseline
- Record actual project performance
- Calculate EVM measures
- Evaluate project performance based on EVM measures
- Respond to project variances
- Integrate EVM and risk management
- Determine if EVM will add value to your organization
- Develop an EVM implementation plan for your organization

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Foundation Concepts

- Definition and benefits of EVM
- History of EVM and Cost and Schedule Control System Criteria (C/SCSC)
- Project applications of EVM

#### Building a Project Baseline

- Definition of project baseline
- Developing a project baseline
- Using a project baseline

#### Recording Actuals

- Data collection for recording actual project performance
- Methods for determining Earned Value
- Improving the data-collection process

#### EVM Performance Measures

- Calculating and interpreting measures of current status
  - Cost and schedule variance
  - Cost and schedule performance indexes
- Calculating and interpreting measures for forecasting results
  - Estimate at completion
  - Latest revised estimate
  - Variance at completion
  - To-complete performance index

#### EVM and Risk Management

- Integrating EVM and risk management
- Developing and using a reserve drawdown curve

#### Responding to Variances

- Determining what is a variance
- Proper process for responding to variances
- Response options

#### Reporting Project Performance

- Determining reporting objectives
- Determining reporting needs
- Reporting options
- Reporting problems

#### Implementing EVM

- Requirements for an EVMS
- Tailoring the EVMS
- EVMS "light"

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Global Project Management

## Managing a Project with Global Stakeholders

Managing a project where customers and support organizations are spread over multiple countries and continents is a major challenge in today's increasingly global environment

There are: different needs for communication, different customs and work expectations, as well as real legal differences which must be considered.

From identifying stakeholders and gathering requirements to planning and controlling the project, a global project has its own unique set of challenges. The goal of this course is to equip you with the necessary knowledge, skills, and techniques so that you can establish effective management and leadership in an environment with a diverse set of stakeholders

### Prerequisites

A good working knowledge of project management, as well as exposure to project leadership issues

### Course Level

Intermediate/Advanced

### Who Should Attend

- Project managers
- All project team members responsible for initiating, planning, and controlling a global project

### Performance Focus

- Identifying stakeholders, gathering their requirements, and creating an

effective communications plan with them

- Leveraging the most appropriate tools and techniques for operating in a global environment
- Customizing stakeholder interaction and project control based on local customs and laws

### What You Will Learn

You'll learn how to:

- Identify unique characteristics of global projects
- Identify and analyze global stakeholders for a project
- Communicate effectively with global stakeholders
- Identify cultural differences and determine how to handle them during the project
- Control global projects
- Close a global project

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Global Project Management

- What is a global project?
- Why is it different from other projects?

#### Initiating the Global Project

- Starting a global project
- Identifying and analyzing stakeholders

- The communication plan
- Selecting the project manager
- A global project charter

#### Planning the Global Project

- Requirements gathering for a global project
- Defining the scope
- Estimating and scheduling difficulties for global projects
- Staffing the global project
- Developing the risk plan

#### Executing the Global Project

- Team building for a global project
- Cultural issues
- Communication styles
- Procurement on a global basis
- Legal issues

#### Monitoring and Controlling the Global Project

- Procurement control
- Progress control
- Stakeholder control

#### Closing the Global Project

- Lessons learned for global projects
- Closing contracts
- Administrative closure

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Managing Multiple Projects

## An Exercise-Driven Workshop

Does your organization work on more than one project at a time? Are there limitations to the types and amount of human and other resources for project assignments?

Are your projects taking longer and longer to complete? Are results less than optimal because of time pressures on resources? Would you like to increase project “throughput”?

Succeeding in today’s competitive marketplace often requires cycle time reduction - reducing the duration of projects and getting results faster This workshop will address managing multiple projects within the context of program or product management

Planning and managing individual projects is challenging When introducing the real-life limitation of resources and other outside influences into the multi-project environment, those challenges are magnified and new challenges are introduced.

This interactive workshop will position you for immediate action. The goal of this course is to equip you with the necessary knowledge, skills, and techniques so that you can effectively and productively manage multiple projects

### Prerequisites

A good working knowledge of project management, as well as some experience managing projects

### Course Level

Intermediate/Advanced

### Who Should Attend

- Anyone who:
  - Manages a single project that is affected by other projects within his/her organization
  - Participates in or leads resource

### assignment

- Makes decisions across multiple projects, and/or supports portfolio management decision-making processes for the selection and prioritization of project
- Manages multiple projects at his/her company

### Performance Focus

- Planning and managing multiple projects
- Managing the dependencies, relationships, and related resources across multiple projects

### What You Will Learn

You’ll learn how to:

- Manage stakeholder relationships and expectations
- Prioritize and sequence multiple projects
- Manage time and stress within a multi-project environment
- Effectively navigate the multi-project environment
- Use appropriate methods to plan and control multiple projects
- Apply scheduling and estimating techniques
- Maintain a dynamic multi-project schedule

### Course Overview

#### Getting Started

- Introductions
  - Course structure
  - Course goals and objectives
- Foundation Concepts
- Portfolio, program, and project management principles
  - The multiple project environment
  - The MMP process model

#### Developing the Multi-Project List

- Multi-project portfolio management
- Project selection
- Project categories and types
- The multi-project list

#### Multi-Project Logical Dependencies

- Project dependencies
- Types of multi-project portfolios
- Categories of logical dependencies across multiple projects
- Project priorities in the multi-project Schedule

#### Multi-Project Resource Management

- Multi-project resources and resource management concepts
- Multi-project resource loading
- Resource pool and resource database
- Multi-project resource issues and outsourcing
- Critical chain resource management, including drum resources and multi-tasking

#### Managing Risk Across Multiple Projects

- Multi-project risk management process
- Identifying, assessing, and responding to multi-project risks
- Critical chain and multi-project risks
- Risk interrelationship management methods

#### Creating and Executing the Multi-Project Plan

- The multi-project plan
- Multi-project scheduling
- Multi-project budgeting
- Executing and maintaining the multi-project plan
- Controlling in the multi-project environment
- Tools in multi-project management

#### Multi-Project Communications

- Effective communication in the multi-project environment
- Common communication barriers
- Multiple project communications plan
- Resolving multi-project conflicts

#### Summary

- What did we learn, and how can we implement this in our work environments?

# The Project Management Office

## A Building Block for Achieving and Managing PM Effectiveness

This course addresses the complex issues of how to integrate a Project Management Office (PMO) into the organization while avoiding bureaucracy, turf wars, and other resistance to a disciplined and flexible PM process throughout the enterprise. Working with our experts, you will assess the needs of your organization for a PMO, be ready to design the kind of PMO that will be most effective for you, and define the path to PM maturity and competency.

Issues addressed include: multiple levels of PMOs, project autonomy, the methodology role of the PMO, and whether the PMO should be the “home” of project managers, or an enabling organization that supports project excellence and portfolio management

### Prerequisites

A good working knowledge of project management, as well as some experience managing projects

### Course Level

Intermediate/Advanced

### Who Should Attend

- Senior PM practitioners, PMO staff, managers of PMs
- Anyone who wants to know what a good PMO is, and how to build and maintain one

### Performance Focus

- Equipping you with the necessary knowledge and skills to establish, improve, and work with a PMO that will be the catalyst for enterprise project management excellence

### What You Will Learn

You’ll learn how to:

- Describe why it is advantageous for an organization to have a PMO
- Differentiate between different views of project success and the role of the PMO as a facilitator to assure success for all stakeholders

- Recognize that the PMO can operate on a continuum, from providing specific functions that support individual projects to being responsible for the results of all of the enterprise’s projects
- Describe the importance of periodic evaluations of projects and other Enterprise Project Management (EPM) processes (e.g., portfolio management) to provide an objective view of maturity and performance
- Describe project management maturity, metrics at maturity levels, and the roles and responsibilities of the PMO in a maturity assessment
- Describe the role of the PMO in performing a competency analysis, and developing and using a competency model
- Determine the steps needed to implement a PMO and effectively position it within the organization

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Foundation Concepts

- Defining a PMO and EPM
- The importance of a PMO
- The desired organizational environment
- Key characteristics of a PMO

#### Project Success: Different Measures and Views

- Definition of project success
- Client and team views of project success
- Ways to quantify project success
- Approaches to rate and evaluate the success of the project at frequent and regular intervals

#### PMO Functions: Project-Focused and Enterprise-Focused

- Organization goals and their influence on PMO functions
- Different levels of coverage for the PMO in the organization

- Project- and enterprise-focused functions

#### The PMO and Project Control, Audit and Recovery

- Establishing a control process to identify troubled projects
- Describing the PMO’s role in review, audit, and recovery
- Identifying troubled projects and conducting a project audit
- Supporting project recovery

#### The PMO’s Role in Project Management Competency Development

- Definition of competency
- The importance of competency in project management
- The PMO’s role in performing a competency analysis
- The PMO’s role in developing and using a competency model

#### Project Management Office: Maturity Levels

- Definition of maturity and organizational/enterprise project management
- The PMO and maturity models
- Metrics and key performance indicators
- Role of the PMO in the maturity assessment process

#### The Ten-Step Implementation Process

- Goals for the PMO
- Commitment for a PMO
- PMO functions, roles, and responsibilities
- Processes and tools to be provided by the PMO
- The PMO resource estimation process
- The needed budget for the PMO
- Staffing the PMO
- Assimilating the PMO

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Project Portfolio Management

## How to Increase the Return on Your Organization's Project Management Investment

This workshop defines the strategy, processes, information, analysis, and deliverables of an effective portfolio management approach. You will learn how to proactively identify, select, de-select, and nurture a balanced and desirable mix of projects. Effective portfolio management improves the multi-project flow through the organization (speed and quality) by minimizing unnecessary multi-tasking and priority changes.

The goal of this course is to provide you with knowledge of the components, importance, and challenges of implementing enterprise-level project portfolio management (PPM) based upon your organization's strategic business goals.

### Prerequisites

We recommend that you have between three and five years of project management experience

### Course Level

Intermediate/Advanced

### Who Should Attend

- People who support portfolio management decision-making processes for the selection and prioritization of projects
- Project Management Office (PMO) team members responsible for or with an interest in developing and managing their project portfolio(s)

### Performance Focus

- Defining the objectives of PPM and project portfolio process
- Strategic planning as it relates to portfolio management
- Linking the project portfolio with the resource and asset portfolios
- Prioritizing projects to improve project flow and return on investment (ROI)
- Managing resource pools and the strategic resource(s)

- Avoiding the trap of becoming too involved in the details
- Defining and facilitating the roles and responsibilities of the PMO, executives, and others
- Ensuring project ownership and sponsorship

### What You Will Learn

You'll learn how to:

- Define the five fundamental components of the enterprise-level PPM process
- Identify the components of PPM, including information requirements, principal performers, and the relationship among the major activities
- Relate the principles of enterprise-level PPM to business strategy and organizational performance
- Evaluate specific techniques, tools and models for project selection, prioritization, resource management, and portfolio balancing
- Navigate the organizational change that is required to implement or improve your portfolio management process
- Recognize the benefits and challenges of implementing portfolio management within the business

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Portfolio Management Framework

- Portfolios, programs, and projects
- A closer look at portfolio management
- Why portfolio management is important
- The enterprise portfolio management model

#### Defining the Portfolio Management Process

- Portfolio management models and approaches

- Portfolio management process steps
- Challenges of multi-project management
- What is business strategy?
- Applying business strategy to the portfolio
- Stepping through a strategic decision
- Implementing business strategy using PM
- Unified Project Management® Methodology (UPMM™) approach to strategic decisions

### Organizational Factors and Influences

- PM and organizational change
- Creating the right environment
- Stakeholder perspectives
- The enterprise PMO

### Acquiring the Right Information

- Key portfolio data elements
- Relating the portfolio data
- Measuring portfolio performance
- Portfolio information checklists

### Analyzing, Balancing, and Optimizing the Portfolio

- What is a balanced portfolio?
- Portfolio selection methods
- Analysis and optimization
- Ways to view the portfolio

### Survey of Enterprise PPM Tools

- Why use PPM tools?
- The three levels of tools
- Effective selection and use
- Available tools and product suites

### Applying Portfolio Management

- Creating a project portfolio
- Refining the portfolio contents
- Root Cause Analysis
- Managing resistance to change

### Summary

- What did we learn, and how can we implement this in our work environments?

## PMI-ACP® Exam Prep

### Preparing Candidates for PMI's Agile Certification

This course builds on the candidates' practical experience of Agile in the workplace to equip them with the broad range of knowledge and skills required for the PMI® Agile Certification exam. It will follow the PMI® requirements and reference the suggested reading list, including the Agile Practice Guide, but will not be limited to those areas.

#### Prerequisites

Candidates attending this course are expected to apply for the PMI® Agile Certification exam, therefore, the course pre-requisites will be those relevant to the exam which are:

- Secondary degree (high school or equivalent) or higher and
- 2,000 hours working on project teams within the last 5 years (Note: PMP® and/or PgMP® credential holders will be accepted as fulfilling this general project experience requirement), and
- 1,500 hours working on Agile project teams or with agile methodologies in the last 3 years (in addition to the 2,000 hours required in general project experience)

In addition, in order to fully contribute to class discussions and maximize the classroom experience for all attendees, IIL recommends that all participants have at least 1,200 hours of agile project experience at the time they attend this course and have plans to acquire the remaining 300 hours - for a total of 1,500 hours in the last three years as required by PMI - within their planned timeframe for taking the PMI-ACP® exam.

#### Course Level

Advanced

#### Who Should Attend

This course is designed for anyone currently working on Agile-based projects and with wider project experience who wants to become PMI® Agile certified.

Anyone with a working knowledge of Agile from senior management to product developers will benefit from this course including but not restricted to:

- Project Managers
- Team Leaders
- Business Analysts
- Technical Coordinators

#### What You Will Learn

You will learn how to:

- Appreciate the wider aspects of Agile project management tools and techniques
- Integrate various disciplines within Agile
- Tailor / customize Agile to suit the needs of different projects

- Prepare yourself for the PMI® Agile Certification examination

#### Course Overview

##### Getting Started

- Introductions
- Agenda
- Expectations

##### Foundation Concepts

- Defining "Traditional" Project Management
  - Project management parameters
  - The "traditional" approach to the parameters
  - Strengths and weaknesses of the traditional approach
- Defining "Agile" Project Management
  - Project management parameters revisited
  - The "agile" approach to the parameters
  - Strengths and weaknesses of agile
- Managing projects with traditional and agile methods
  - Can the two approaches co-exist?
  - Leveraging the benefits of both methods
  - Options for using both methods on a project
  - Avoiding the elephant traps
- Key aspects of the PMI® Agile Certified Practitioner (PMI-ACP)® Handbook
  - Overview
  - Eligibility requirements
  - Exam information
  - Exam Blueprint
  - Continuing certification requirements
- Key aspects of the PMI Agile Certification Examination Content Outline
  - Introduction
  - Agile exam content outline
  - Tools and techniques
  - Knowledge and skills
  - Domains and tasks (not examined)
- An Introduction to and Implementing Agile
- Definable work vs high-uncertainty work
- Project factors that influence tailoring
- The Agile Manifesto and 12 Principles
- Agile mindset
- Agile domains and tasks

##### Agile Tools and Techniques Related to PM "Hard Skills"

- Planning, monitoring, and adapting
  - The need for planning, monitoring, and adapting
  - The Agile approach to planning and plans
  - The Agile planning tools and techniques
  - The Agile monitoring tools and techniques
  - The Agile approach to adapting
- Product quality
  - A definition of "product quality"
  - Setting the standard for product quality
  - Agile tools and techniques for achieving product quality
- Risk management
  - A definition of "risk"

- What is "at risk"?
- The acceptability of risks
- The Agile tools and techniques for managing risks

##### Agile Tools and Techniques Related to PM "Soft Skills"

- The difference between PM "hard and soft" skills
- Communications
  - The importance of communications
  - Forms of agile communications
  - Communications within the project
  - Communications from the project
  - Communications to the project
  - Making communications the cultural norm
- Interpersonal Skills
  - Defining and understanding management
  - Defining and understanding leadership
  - Defining and understanding servant leadership
  - Delegating vs empowering
  - Playing to people's strengths
  - Overcoming the roadblocks
- Core Agile Tools and Techniques
- The philosophy of core Agile tools and techniques
- Agile estimation

##### Value-Based Agile Tools and Techniques

- The role of value-based tools and techniques in bridging traditional PM with Agile
- Value-based prioritization
  - Value-based prioritization and agile projects
  - Investment appraisal methods
  - Regulatory driven
  - Customer driven
  - Ranking methods (MMF, MoSCoW)
- Metrics
  - What should we measure / track?
  - Methods of measuring / tracking
  - Adding value with metrics
- Process Improvement
  - Value-stream analysis
  - Value-stream mapping

##### Agile Knowledge and Skills

- Context of Agile Knowledge and Skills vis-à-vis Agile Tools and Techniques
- Agile Knowledge and Skills
  - Process focused
  - People focused
  - Product focused
  - Project focused

##### Exam Preparation and Course Closure

- The application process - where are you now?
- The "Exam-Focused Journal" - what you still have to do
- Further preparation - self-study schedule
- Exam topic review
- Practice exam
- Practice exam debrief

# Implementing Scrum for Agile Software Development

## A Practical Approach for All Team Members

Scrum is an iterative, incremental framework for developing software products. It allows teams to deliver a potentially shippable set of functionality for each iteration, providing the agility needed to respond to rapidly changing requirements. These characteristics have led to Scrum becoming the most popular method in the world of Agile software development.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Basic/Intermediate

### Who Should Attend

- All members or potential members of Scrum teams
- Anyone considering implementing Scrum on projects in their environment
- ScrumMasters®
- Product owners
- Software development managers
- Developers and testers
- Business Analysts and architects
- Customers and users

### Performance Focus

- Increasing efficiency and flexibility using Scrum

### What You Will Learn

You'll learn how to:

- Describe the Agile values and principles
- Explain Scrum roles and responsibilities
- Conduct Scrum ceremonies
- Estimate and plan Scrum projects
- Develop user stories to document requirements
- Create release and Sprint plans

- Design conditions of success for implementing Scrum in your environment
- Describe a process for scaling Scrum for large projects

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives
- Scrum Basics
- Scrum overview
- Agile values and principles
- Contrasting Agile and waterfall development
- Scrum roles and responsibilities
- The Scrum team environment
- Stakeholder and user roles
- Activity: Identify stakeholder and user roles

#### Initiating a Scrum Project

- Sprint Zero activities
- Creating a vision statement
- Activity: Define the vision
- Creating the product Backlog
- Guidelines for writing user stories
- Activity: Write user stories for the Product Backlog
- Writing acceptance tests for user stories

#### Planning Releases

- Planning releases
- Estimating user stories
- Planning Poker
- Activity: Estimate user stories using Planning Poker
- Prioritizing user stories
- Prioritizing themes for releases
- Activity: Prioritize user stories
- Selecting a Sprint length
- Estimating velocity

- Creating a release plan
- Activity: Create a release plan

#### Planning a Sprint

- The Sprint planning meeting
- Creating a Sprint plan
- Creating the Sprint Backlog
- Activity: Create the Team Board and Sprint Backlog for the first Sprint
- Commitment and velocity-driven Sprint planning

#### Running a Sprint

- Conducting a Sprint
- The Daily Scrum
- Using burndown charts to track progress
- The Team Board
- Activity: Hold a Daily Scrum, update the Team Board, and create a burndown chart
- Negotiating changes during the Sprint
- Techniques for splitting user stories
- The Sprint Review Meeting
- Managing changes to the Product Backlog
- Release software into production
- Closing the Scrum project

#### Implementing and Scaling Scrum

- Conditions of success for implementing Scrum
- Implementing Scrum
- Sprint metrics
- Introducing Scrum to your organization
- Scaling Scrum
- Sprint retrospectives
- Activity: Conduct a workshop retrospective

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Managing Agile and Waterfall Projects

## Exploring How the Two Different Approaches Might be Used Together

This course presents an approach to project management which capitalizes on the most appropriate elements of each approach tailored to the specific project being undertaken. In this course, the Waterfall approach will be based on the PMBOK® Guide Each approach will be presented to highlight its particular strategy and strengths. The course will then propose project scenarios which will require the project team to use a hybrid method which brings together aspects of both approaches. The overall goal of the course is threefold:

1. To introduce the Waterfall approach to project management
2. To introduce the Agile approach to project management
3. To explore how a combination of both approaches can bring added value to the sponsoring organization and their customers

### Prerequisites

Basic familiarity with Agile and Waterfall approaches

### Course Level

Specialty topic

### Who Should Attend

- Project management team members interested in learning Agile and Waterfall principles and practices, and how to
  - treat them as a toolbox, from which the most appropriate set can be selected for specific projects
  - Senior managers who want to know why project teams are customizing “tried and trusted” methods
  - Those who have been exclusively used to using either Agile or Waterfall and need to understand their respective
    - strengths and how and why, therefore, they may be used to complement each other within a single project
  - Project managers who are in a situation where some team members

are using Waterfall and others are using Agile approaches

### Performance Focus

- Becoming familiar with the Waterfall approach, principles, and practices
- Understanding the Agile approach, principles, and practices
- Exploring a hybrid approach
- Understanding the Agile approach, principles, and practices
- Exploring a Hybrid approach

### What You Will Learn

You’ll learn how to:

- Identify the strengths that the Waterfall approach brings to project work
- Identify the strengths that the Agile approach brings to project work
- Exploit the strengths of each method by combining their practices and protocols to maximize the potential for return on investment

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Foundation Concepts

- The purpose and importance of project work
- The drivers for change
- The roles associated with projects
- The competing demands of project work
- The significance of competing demands
- The problem of meeting all competing demands
- The rationale for ranking the competing demands for optimal business return on investment

#### The Waterfall Approach to Competing Demands Optimization

- What do we mean by “Waterfall”?
- Setting, aligning, and managing the

competing demand priorities

- The PMBOK® Guide process model
- The strengths of Waterfall / the PMBOK® Guide

#### The Agile Approach to Competing Demands Optimization

- What do we mean by Agile?
- Setting, aligning, and managing the competing demand priorities
- The Agile PM approach
- The strengths of Agile / Agile PM

#### Key Facets between Waterfall and Agile

- Four areas within projects
  - Management
  - Requirements
  - Reporting
  - Delivery Team

#### Examples for Implementing a Hybrid Approach

- The available toolset(s)
- Options for combining both approaches
  - Guidelines for experimenting with these and other creative combinations

#### The Challenges for the “Combination” Project Management Team

- The sponsoring organization
- The decision-making body within the project
- The project manager
- The delivery team

#### Practicing the Hybrid Approach

- Final exercise
- Understanding the practical applicability of hybrid options

#### Summary and Next Steps

- Review of key concepts
- What did we learn, and how can we implement this in our work environments?

# Agile Practices for All Projects

## Introducing Agile Development and Its Relationship to Project Management

The concept of Agile software development incorporates the principles and precepts of a number of software development and quality management methods that are based on speeding the time to market. The Agile development approach enables cycle time reductions through lower process overhead and more efficient and responsive practices

### Prerequisites

Basic familiarity with software development and software engineering terms and techniques

### Course Level

Specialty

### Who Should Attend

This course is designed for:

- Developers interested in learning Agile concepts and practices
- IT managers who want to know what all the fuss is about
- Those involved in the Agile approach who want to refine their techniques or learn some new practices
- Project managers interested in leading their software projects with more agility

### What You Will Learn

Course participants will understand the basic Agile approach and the various methods for achieving agility and will be able to:

- Compare and contrast the Agile approach to the continuum of more traditional software development approaches
- Apply selected Agile practices to specific software development situations
- Explain selected Agile leadership principles that enable an Agile approach to project management, either in or beyond the software development environment
- Define and adapt a process for transforming an existing software

development methodology to a more Agile approach

### Course Overview

#### Getting Started

- Welcome
- Course orientation
- Why is this course important?
- Participants' expectations

#### Foundation Concepts

- Software Development Environment (SDLCs)
- Agile approach to software development
- Overarching Agile principles (Agile manifesto, its principles, and key enablers)
- Applying Agile concepts to project management
- Journey into Agile territory (topic flow from technical practices to leadership/directional practices to implementation)

#### Solution-focused Agile Development Practices (Requirements, Analysis, and Design)

- From Agile values to Agile practices (translating the Manifesto into specific practices, starting with those that are technical and relate to solving the business problem)
- Agile requirements practices
- Agile analysis and design practices

#### Product-focused Agile Development Practices (Development, Testing, and Deployment)

- Agile technical practices continued (introducing the technical practices associated with building the SW product)
- Agile development
- Agile (post-development) testing
- Agile deployment
- Process-focused Agile Development Practices (Agility and Project management)

- Managing Agile projects (introduction to leadership/directional Agile practices, including the debate over the concept of an Agile project manager and the PMI standards used as the basis for comparison)
- The Agile environment (Agile analogs to PMI's Organizational Project Management or Program Management concerns)
- Agile initiating (following the PMBOK® Guide structure to explore Agile analogs to the five PM process groups)
- Agile planning
- Agile executing
- Agile monitoring and controlling
- Agile closing

#### Implementing Agile Development

- Trailblazing an Agile path (introduction to alternative approaches to implementing Agile and four major phases involved in getting there, regardless of approach)
- To be or not to be Agile? (criteria for determining whether Agile is a viable option given the environment or specific situation)
- Implementing Agile practices (starting from the bottom-up approach or easiest path, a few practices at a time)
- Implementing Agile projects (exploring bottom-up option to implement an Agile method, project by project)
- Influencing beyond our reach (starting from the top down for an Agile method or even a more agile organization, although beyond the purview of participants in the course, what we CAN do to influence the process for better results)

#### Summary

- What did we learn, and how can we implement this in our work environments?

# ITIL® Awareness Course

## Key Principles for a Quality IT Infrastructure

This ITIL Awareness course is designed to enable you to understand the overall structure of ITIL. The course uses an example that follows a business idea from inception to production.

### Eligibility and Prerequisites

No previous knowledge of ITIL is required to complete this course

### Course Level

Basic

### Who Should Attend

- Individuals at all levels in a company (including Executive Management) who do not require ITIL Foundation certification but still require a fundamental understanding of the ITIL framework and how it may be used to improve the quality of IT Service Management within an organization
- IT professionals that are working within an organization that has incorporated, or will be incorporating, the ITIL framework in order to provide better IT services

- All other staff involved in delivering IT services that use the ITIL methodology

### Performance Focus

- Understanding Service Management and the importance of ITIL
- Integrating IT with business goals
- Understanding and utilizing the areas of:
  - Service Operation
  - Service Transition
  - Service Design
  - Service Strategy
- Implementing Continuous Service Improvement

### What You Will Learn

You'll learn how to:

- Demonstrate knowledge and understanding of an internationally recognized, best practice framework, that if correctly adopted and adapted, will help the organization create a more structured value-add IT infrastructure in order to better meet the demands of its customers' business objectives

### Course Overview

### Getting Started

- Introductions
- Course structure
- Course goals and objectives

### Service Management as a Practice

### Service Strategy

### Service Design

### Service Transition

### Service Operation

### Continual Service Improvement, ITIL Certification Path, ITIL Implementation

### Summary

- What did we learn, and how can we implement this in our work environments?

# ITIL® Foundation

## Key Principles for a Quality IT Infrastructure

This ITIL 2011 Foundation course is designed to help you understand the key principles, processes, functions, roles, and benefits that enable Service Management staff to deliver and support quality IT services to its customers.

### Prerequisites

Service Management knowledge is beneficial; however, previous knowledge of ITIL is not required to complete this course. This is the entry level to preparation for the ITIL qualification.

### Course Level

Basic

### Who Should Attend

- Individuals who require a fundamental understanding of the ITIL framework and how it may be used to improve the quality of IT Service Management within an organization
- IT professionals that are working within an organization that has incorporated, or will be incorporating, the ITIL framework in order to provide better IT services
- All other staff involved in delivering IT services that use the ITIL methodology

### Performance Focus

- Understanding Service Management and the importance of ITIL
- Integrating IT with your business goals
- Understanding and utilizing the areas of:
  - Service Operation
  - Service Transition
  - Service Design
  - Service Strategy
- Implementing Continuous Service Improvement
- Preparing to take and pass the ITIL Foundation exam

### What You Will Learn

- You'll learn how to:
- Demonstrate knowledge and understanding of an internationally recognized, best practice framework that if correctly adopted and adapted, will help the organization create a more structured value-add IT infrastructure, in order to better meet the demands of its customers' business objectives
  - Prepare and practice for the ITIL Foundation exam
  - Follow a business idea from concept to production, and continue to improvement

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### ITIL Fundamentals

- What is ITIL and where did it come from?
- Introduction to the case study
- The Service Lifecycle
- Why ITIL is successful
- Definition of services
- Definition of Service Management
- Processes and functions
- Generic roles in ITIL and RACI charts
- ITIL and Automation
- Competence and skills
- Certification scheme

#### Service Strategy

- Purpose, objective, scope, and value to the business of Service Strategy
- Assets, Capabilities, and Resources
- Service Provider Types
- Value Creation
- Utility and Warranty
- Patterns of Business Activity
- Business Case

- Risk Management
- Governance
- Processes
- The Service Package

#### Service Design

- Purpose, objective, scope, and value to the business of Service Design
- The Four Ps
- The Five Major Aspects
- Processes
- The Service Design Package

#### Service Transition

- Purpose, objective, scope, and value to the business of Service Transition
- Processes
- The Released Service

#### Service Operation

- Purpose, objective, scope, and value to the business of Service Operation
- Functions
- Processes
- Service Performance Reports

#### Continual Service Improvement

- Purpose, objective, scope, and value to the business of Continual Service Improvement
- Baselines
- Deming Cycle
- CSI Approach
- Critical Success Factors, Key

#### Performance Indicators, and Metrics

- The CSI Register
- The Seven-step Improvement Process
- The Service Improvement Plan

#### ITIL Foundation Exam Preparation

- Review of and practice with the APMG Sample questions and test papers

#### ITIL Foundation Exam\*

- 1 hour, 40 multiple choice questions

# ITIL® Passport Foundation

## On-Demand Training for ITIL

ITIL Passport is accredited by the APM Group to support self-study distance learning for the ITIL Foundation exam. IIL's self-study products aim to provide you with a straightforward route to becoming a fully certificated professional in your own time and at your own pace ITIL Passport is compatible with laptops, desktops, android tablets, iPads, and mobile devices

*Note: The ITIL Foundation exam fee is included in the course price.*

### Prerequisites

Service Management knowledge is beneficial, however, previous knowledge of ITIL is not required to complete this course This is the entry level to preparation for the ITIL Qualification.

### Course Level

Basic

### Who Should Attend

- Individuals who require a fundamental understanding of the ITIL framework and how it may be used to improve the quality of IT Service Management within an organization
- IT professionals that are working within an organization that has incorporated or will be incorporating, the ITIL framework in order to provide better IT services
- All other staff involved in delivering IT services that use the ITIL methodology

### What are the benefits?

- Provides flexibility for those wishing to study at a time, pace, and place convenient to them
- A flexible choice of self-study options using innovative leading-edge eLearning developed by industry experts
- A cost-effective solution for both individuals and organizations
- People using IIL e-Learning products consistently achieve a higher score in the Foundation exam
- Achieving the Foundation Certificate using Passport will enable candidates to progress on to further levels with the ITIL qualifications framework

- Online learning gives you the freedom to access from any location

### What You Will Learn

You'll learn how to:

- Demonstrate knowledge and understanding of an internationally recognized, best practice framework, that if correctly adopted and adapted, will help the organization create a more structured value-add IT infrastructure, in order to better meet the demands of its customers' business objectives
- Prepare and practice for the ITIL Foundation exam
- Follow a business idea from concept to production, and continue to improvement

### Course Overview

#### Getting Started

Getting to grips with ITIL Terminology What is IT Infrastructure Library? Why is ITIL so successful? ITIL Lifecycle Core Foundation Certificate in IT Service Management

#### Service Management as a Practice

Definition of a Service Concepts of Service Management Need and Source for Best Practice. What is a Service? Types of Service. Who are the Stakeholders? Key Definitions What are Processes? Functions and Roles Key Roles. The RACI Matrix.

#### Service Strategy

Purpose, Objectives and Scope Creation of Value Components of Value, How Customers Perceive Value Assets, Resources and Capabilities, Service Provider Types, Service Strategy Processes, Business Relationship Management, BRM vs SLM, Service Portfolio, Service Portfolio Management Risk, Management Financial, Management Business, Case Value to Business

#### Service Design

Purpose, Objectives and Scope Five Aspects of Service Design, Service Design Package, Four Ps of Service Design, Service Design Processes, Design

Coordination Service, Catalogue Management Service, Catalogue Views Service Level Management How Service, Level Management Works SLA Contents, Monitoring and Interactions Availability, Management Availability Management, Explained Capacity Management IT Service, Continuity Management, Information Security Management, Supplier Management, Value to Business.

### Service Transition

Purpose, Objectives and Scope, Service Transition Processes, Transition Planning Support, Change Management, Change Management Process Flow and Interactions, Release and Deployment Management, Service Asset Configuration, Management Knowledge Management, Value to Business.

### Service Operation

Purpose, Objectives and Scope Communication, Service Operation— Functions and Processes, Service Desk Application and Technical Management, IT Operations Management Event Management, Incident Management, Incident Management Procedure, Request Fulfilment, Access Management, Problem Management, Problem Management Procedure, Value to the Business

### Continual Service Improvement

Purpose, Objectives and Scope Deming Cycle, CSI Approach, Measurement Metrics, CSF KPI, CSI Register, Seven Step Improvement, Governance, Value to Business

### Technology Considerations

Technology Considerations, Technology Benefits, Core Requirements Tool Selection

### Exam Preparation

Competence and Training, Qualifications Foundation Exam Overview, Foundation Exam Approaches, (Hints and tips on exam approach; style of questions), Full Foundation exam simulation with references to both the eLearning Module / Lesson and the ITIL Syllabus and interactive adaptive reasoning feedback.

# Project Management Fundamentals for IT Professionals

## Developed for Information Technology Environments

A number of factors impact the project manager's role within information technology (IT) - for instance, the need to fully integrate IT into the business improvement process and also the advent of distributed technology and Business Process Reengineering. As a result, the range of activities required of a project manager has greatly increased, as well as the range of people with whom s/he interacts. This workshop enables you to minimize the problems inherent in managing a systems development project.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Basic

### Who Should Attend

- Information technology professionals
- Product managers
- Systems and software developers
- Systems analysts and IT managers
- Business people who are involved in IT projects

### Performance Focus

- Managing IT projects along with project management skills and concepts
- Realistic planning and controlling, along with other project management activities, to maximize the probability of project success
- Obtaining a workable plan of action for managing IT projects effectively and the skills needed to make the plan succeed

### What You Will Learn

You'll learn how to:

- Articulate the benefit of using project management methodology, processes, and various life cycles for IT projects
- Articulate various standards and maturity models that provide benefits to performing organizations that manage IT projects
- Describe governance, gating, and the processes required for project origination
- Conduct a stakeholder analysis and describe its benefits throughout the project life cycle
- Gather good requirements, develop a work breakdown structure (WBS), and establish a baseline project plan
- Execute against the baseline project plan while managing change and configuration items
- Monitor and control project activities using the baseline project plan and Earned Value Management concepts
- Close the project by conducting scope verification, procurement audits, gathering lessons learned, archiving project records, and releasing resources

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives
- Case study

#### Foundation Concepts

- Key definitions and concepts
- Methodologies, processes, and project life cycles
- Project success factors and the benefits of standards and models

#### Originating and Initiating

- Originating projects

- Initiating projects

#### Planning Scope and Quality

- Planning project scope
- Planning project quality

#### Planning Time

- Planning project time
- Identifying schedule activities
- Sequencing schedule activities
- Estimating activity resources and time
- Developing the project schedule

#### Planning Risk and Cost

- Planning for project risks
- Planning project costs
- Estimating project costs
- Developing a project budget

#### Planning Human Resources

- Planning Human Resources
- Developing a project team
- Developing effective leadership skills

#### Planning Communication and Procurement

- Planning project communications
- Planning project procurements

#### Executing, Monitoring and Controlling

- Executing
- Monitoring and controlling

#### Project Closing

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Requirements Management for IT Professionals

## Managing Project Scope from Concept to Completion

The causes of the majority of failed information technology (IT) projects can be traced to poor definition and understanding of requirements. Changing requirements create more delays than any other factor. If you want to improve project performance, you must improve the way you define and manage requirements. They are the bridge between the customer who will describe, pay for, and use the system, and the technical community who will specify and provide the system.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Intermediate

### Who Should Attend

Systems professionals or business associates who will take part in defining requirements for computer systems development, business reengineering, procedural change, or other activities that require the analysis of a business system

### Performance Focus

- Cultivating the skills needed to identify and get full business information from the right sponsors, clients, users, and others
- Acquiring structured and object-oriented modeling techniques and templates to identify and present business and systems requirements clearly and effectively

### What You Will Learn

You'll learn how to:

- Determine who the stakeholders are and establish roles and appropriate requirements-gathering techniques
- Differentiate between business, user,

functional, and system requirements

- Gather requirements and create the User Requirements Specification (URS) document
- Develop user and functional Use Cases
- Create the Software Requirements Specification (SRS) document

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Introduction to Requirements Management

- Objectives of projects
- The project environment
- Classifying projects
- Requirements for systems
- Levels of requirements
- Requirements documents
- User Requirements Specification
- Voice of the Customer
- Documenting the beginning of the project
- Stakeholder assessment
- Roles and responsibilities of stakeholders
- Creating the URS

#### Requirements Development

- Five levels of requirements maturity
- Requirements development and the major activities
- Detailed descriptions of type of requirements
- Quality attributes and example of requirements in traditional "shall" statements
- Requirements prioritization
- Requirements repository

#### Requirements Elicitation Tools

- Interviewing
- Objects and classes
- Class, package, and sequence diagrams
- What does a Use Case look like?
- Elements of a Use Case
- Types of Use Case - textual versus graphical
- Use Case and requirements collection
- Prototyping
- Storyboarding
- Brainstorming
- Requirements workshop

#### Requirements Analysis

- Structured analysis
- Context diagrams
- Data flow diagrams
- Entity relationship diagrams
- Structured English
- Data dictionary
- Decision table and decision tree

#### Requirements Specification

- Software Requirements Specification
- Identifying sources of requirements
- Labeling requirements
- Organizing requirements information
- Documenting business rules
- Creating a requirements traceability matrix

#### Requirements Verification and Control

- Requirements analysis and verification
- Requirements pre-reviews
- Requirements reviews
- Requirements checklists
- Test cases for verification
- Requirements testing
- Requirements change control

#### Summary

- What did we learn, and how can we implement this in our work environments?

## Business Analysis Certificate Program

### Be the Architect of Strategic Goals

ILL's Business Analysis Certificate Program is designed to provide you with the core skills, knowledge, and hands-on experience needed to succeed as a Business Analyst in today's global marketplace.

Depending upon the delivery method that you choose, the program earns you between 60 and 70 PDUs, and can be completed within a time period of 3 to 12 months. Courses may be taken in either our Virtual Classroom, Traditional, or On-Demand Learning setting. While we recommend that you take the courses in the order shown to the right, you may take them in an order that best fits your needs, interests, and schedule

#### Who Should Attend

Business Analysts, or anyone who:

- Defines and manages requirements through the development cycle
- Elicits information from stakeholders to define requirements
- Solves, defines, or analyzes business problems

#### Performance Focus

- Analyzing current best practices from some of the most successful companies that utilize Business Analysis
- Learning to better define and manage requirements
- Eliciting information from stakeholders
- Analyzing business processes
- Finding innovative and efficient solutions to even the most challenging business problems

#### What You Will Learn

You'll learn how to:

- Define the product scope
- Work with the development team in the systems testing stage
- Ensure that the solution is usable in the business environment
- Acquire the information necessary for the definition of requirements
- Conduct a requirements information gathering session
- Write and validate a requirements document
- Manage the changes to requirements

- Document through the Systems Development Life Cycle (SDLC)
- Work with Unified Modeling Language (UML) diagrams
- Use process modeling in business diagramming
- Diagram and model business processes
- And much more!

#### Criteria for Receiving the Certificate

In order to be awarded the certificate, you must:

- Complete the four required courses
- Achieve at least a 70% score on each of the post-course multiple-choice online exams (a 30-question exam for our two-day courses; a 45-question exam for our three-day courses)

#### Course Delivery Methods

As a participant in the program, you can choose one of the following delivery methods:

- Virtual Classroom
- Traditional
- On-Demand Learning

# Business Analysis Fundamentals

## Solving the Business Problem

This course teaches participants the overall process of business analysis and where it fits in the bigger picture of the project life cycle and the business context. The course is interactive and combines discussion, active workshops, and demonstrations of techniques. The goal is bottom-line results that cut through the real-world problems facing people seeking to improve the way they operate to develop new and improved systems and products or otherwise deliver results through project performance.

### Prerequisites

No prerequisites: this course is suitable for both novices and experienced people who need a clear business analyst Model.

### Course Level

Novice/Advanced

### Who Should Attend

- It is important for you to attend if you:
- Work as a business analyst
- Define and manage requirements through the development life cycle

### Performance Focus

- Business analysis
- Defining solutions to business problems
- Stakeholder analysis
- Defining the solution scope

### Learning Objectives

Upon completion, participants will be able to:

- Define the solution scope
- Work with the development team in the systems testing stage
- Ensure the solution is usable in the business environment

### Course Overview

#### Foundation Concepts

- Defining the Business Analyst Function
- Role of the Business Analyst as Change Agent
- An Introduction to the BABOK® Guide
- Business Analyst Roles and Relationships through the Project Life Cycle

#### Business Analysis Planning and Monitoring - Defining the Process

- Overview of Business Analysis Planning & Monitoring (BAP&M)
- BAP&M - Process and Tools
- BAP&M - Roles and Responsibilities
- BAP&M - Governance, Information Management & Performance Improvement

#### Elicitation and Collaboration - Gathering and Confirming Information

- Overview of Elicitation and Collaboration
- Elicitation and Collaboration Techniques

#### Requirements Life Cycle Management - Maintaining Requirements and Design

### Information

- Overview of Requirements Life Cycle Management
- Requirements Life Cycle Management Tasks - Details

### Strategy Analysis - Providing Context to Requirements Analysis and Design Definition

- Overview of Strategy Analysis
- Analyze Current State
- Define Future State
- Assess Risks
- Define Change Strategy

### Requirements Analysis and Design Definition - Defining Solution Options

- Overview of Requirements Analysis and Design Definition (RA&DD)
- The Anatomy of Requirements
- RA&DD Task Descriptions
- RA&DD Techniques

### Solution Evaluation - Assessing Solution Performance

- Overview of Solution Evaluation
- Solution Evaluation Tasks

### Solution Evaluation in Development Stages

### Underlying Competencies

- Overview of Underlying Competencies (UCs)
- Underlying Competencies - Details

# Facilitation Skills for Business Analysts

## Communication and Problem Solving

Business analysts are communicators who bridge the gap between people with business needs and knowledge and the people who will provide solutions. Business analysts are continuously involved in communications with stakeholders and developers as they create the solution to business problems. They participate in information-gathering sessions including interviewing, joint requirements definition, and Joint Application Design (JAD) workshops which are used to streamline information gathering and get immediate validation from user representatives. The business analyst is also involved with negotiating the solution with the stakeholders, upper-level management and the developers, mediating among the groups when disagreements take place, and influencing the results of decisions during the solution cycle. This course teaches the methods needed to organize and run information-gathering events. It combines the basics of graphic decision making and modeling with facilitation, communication, and meeting management skills.

### Prerequisites

No prerequisites: this course is suitable for both novices and experienced people who need to elicit business requirements or solve business problems.

### Course Level

Novice/Advanced

### Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Define and manage requirements through the development life cycle
- Elicit information from stakeholders to define requirements
- Solve business problems

### Performance Focus

- Business analysis

- Defining solutions to business problems
- Requirements elicitation
- Facilitation of meetings
- Negotiation skills and techniques
- Decision analysis

### Learning Objectives

Upon completion, participants will be able to:

- Acquire information necessary to the definition of requirements
- Conduct a requirements information gathering session
- Identify alternate solutions to business problems
- Get agreement that the solution is usable in the business environment

### Course Overview

#### Foundation Concepts

- The role of the business analyst
- An introduction to the IIBA® BABOK® Guide
- The business analyst and the product/project life cycle (PLC)
- Facilitation skills for the business analyst

#### Requirements Communication through Business Analysis Planning & Monitoring and Enterprise Analysis

- An introduction to the communication process
- Addressing basic communication challenges
- Planning business analysis communication
- Communication and BABOK® Guide tasks

#### Targeted Elicitation Techniques

- Synergy between requirements communication and targeted elicitation techniques
- Preparing for elicitation
- Cornerstone targeted technique: interviews
- Other targeted elicitation techniques
- Related general communication skills (listening and empathy)

#### Group Elicitation Techniques

- Synergy between requirements communication and group elicitation techniques
- Cornerstone group elicitation technique - requirements workshops
- Other group elicitation techniques
- Related general communication skills - meeting management best practices
- Related general communication skills - facilitating best practices

#### Process / Model-based Elicitation Techniques

- Synergy between requirements communication and process / model based elicitation techniques
- Process / model-based elicitation techniques
- Related interpersonal skills - problem solving and decision making
- Investigative Elicitation Techniques
- Synergy between requirements communication and investigative elicitation techniques
- Cornerstone investigative elicitation technique - document analysis
- Other investigative elicitation techniques
- Summary of elicitation techniques by usage in the requirements process

#### Using Presentations, Structured Walkthroughs, and Influencing Skills

- Structured walkthroughs, presentations, and influencing within BABOK® Guide tasks
- Cornerstone technique - structured walkthroughs
- General communication skill - presenting
- Related interpersonal skill - influencing
- Special Facilitation Skills - Negotiating and Mediating
- Negotiating
- Mediating

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Writing and Managing Requirements Documents

## Creating the Acceptable, Approvable Requirements Document

Once a business analyst has completed the information gathering and analysis to produce the solution to a business problem, the results must be documented for all stakeholders to see and understand. This course will enhance the skill set needed for writing and managing the complex readership that business analysts interact with on a day-to-day basis.

### Prerequisites

No prerequisites: this course is suitable for both novices and experienced people who need to produce requirements documents for development.

### Course Level

Novice/Advanced

### Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Define and manage requirements through the development life cycle
- Prepare requirements documents for development

### Performance Focus

- Business analysis
- Defining solutions to business problems
- Selecting the audience to write to
- Requirements writing guidelines
- Writing clear, precise, unambiguous

requirements

- Managing the requirements document through the System Development Life Cycle (SDLC)

### Learning Objectives

Upon completion, participants will be able to:

- Write an understood requirements document that is approvable and acceptable
- Validate a requirements document
- Manage the changes to requirements documents through the SDLC

### Course Overview

#### Foundation Concepts

- The role of the business analyst
- An introduction to the BABOK® Guide
- The business analyst and the product/project life cycle
- The requirements documentation process

#### Planning for Effective Requirements Documentation

- Overview of requirements planning
- Planning for validation
- Planning for verification: well-formed criteria
- Planning for verification: understood and usable criteria

#### Writing Effective Requirements Documents

- Overview of writing requirements documents
- Using a standard structure / template
- Applying formatting techniques
- Meeting the challenge of writing nonfunctional requirements

#### Baselining Requirements Documents

- Overview of the requirements baseline process
- Validation
- Verification
- Approval

#### Managing Requirements Change through the Product Life Cycle

- Overview of requirements change management
- Establishing a formal change management process
- Tracing requirements through design and development (build, test, and implementation)
- Following through to post implementation (transition and early production)

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Business Process Modeling

## Diagramming the Business Problem and Solution

A process model is a description of a process in terms of its steps or actions, the data flowing between them and participants in the process, machines, systems, and organizations involved. Modeling is a critical business analysis skill. It applies graphical and text communication techniques to describe the actions, objects, and relationships acted upon in the process and the steps that act upon them. This course teaches the technique of process modeling and ties together the core methods of process, behavior and data modeling to enable business analysts to fully describe business processes in levels of detail from multiple perspectives.

### Prerequisites

This course assumes the participant is a practicing business analyst familiar with basic practices of business analysis.

### Course Level

Intermediate/Advanced

### Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Define business problems
- Analyze business processes

### Performance Focus

- Business analysis
- Defining solutions to business problems
- Workflow modeling
- Data modeling and entity relationship

analysis

- Use cases
- Unified Modeling Language (UML) diagrams

### Learning Objectives

Upon completion, participants will be able to:

- Identify business processes and their components
- Work with UML diagrams
- Use process modeling in business diagram
- Diagram and model business processes

### Course Overview

#### Foundation Concepts

- The role of the business analyst, The IIBA® BABOK® Knowledge Areas
- Business Process Modeling (BPM) and the business analyst
- A practical approach to business process modeling

#### The Context for Modeling Business Processes

- Overview of context for business process modeling
- Analyzing stakeholder information
- Modeling best practices
- Critical inputs for BPM: Business Rules
- Critical inputs for BPM: Context Diagrams

#### Data Models

- Overview of data modeling

- Entity relationship diagrams
- Object-oriented approach
- Class diagrams
- Other data models

#### Process Models - Part I (Non-UML)

- Overview of process modeling
- Data flow diagrams
- Workflow diagrams
- Flowcharts

#### Process Models - Part II (UML)

- Overview of UML Process Models
- UML Activity Diagrams
- UML Sequence Diagrams

#### Usage Models - Part I (Non-UML)

- Overview of usage modeling
- Prototyping options
- Static prototyping and storyboards
- Dynamic prototyping
- User Interface Design and user stories

#### Usage Models - Part II (UML Use Cases)

- Overview of Use Cases
- Use Case diagrams
- Use Case descriptions
- Use Cases and the product life cycle

#### Integrating the Models

- Overview of integrating the models
- General analysis best practices
- Specific analysis techniques summary
- Best practices for transition to design

#### Summary

- What did we learn and how can we implement this in our work environments?

# Effecting Business Process Improvement

## The Proactive Business Analyst

Business analysts facilitate the solution of business problems. The solutions are put into practice as changes to the way people perform in their organizations and the tools they use. The business analyst is a change agent who must understand the basic principles of quality management. This course covers the key role that business analysts play in organizational change management.

### Prerequisites

This course is aimed at people who are practicing business analysts or who have had previous business analysis training

### Course Level

Intermediate/Advanced

### Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Analyze the results of technical solutions to business problems
- Participate in the initiation and/or management of change in the organization

### Performance Focus

- Business analysis
- Defining solutions to business problems
- Managing organizational change
- Enterprise analysis
- Analytical methods

- Work-flow modeling and analysis
- Process and data modeling
- Business process reengineering

### What You Will Learn

You will learn how to:

- Define and document a business process
- Work with various business modeling techniques
- Perform an enterprise analysis in preparation for determining requirements
- Analyze business processes to discern problems

### Course Overview

#### Foundation Concepts

- Overview of business analysis and process improvement
- Defining the business process
- Introducing the proactive business analyst
- Focusing on business process improvement for business analysts

#### Launching a Successful Business Process Improvement Project

- Overview of the launch phase

- Understanding and creating organizational strategy
- Selecting the target process
- Aligning the business process improvement project's goals and objectives with organizational strategy

#### Defining the Current Process

- Overview of current process phase
- Documenting the business process
- Business modeling options: work-flow models
- Business modeling options: Unified Modeling Language (UML) model adaptations for business processes

#### Analyzing the Current Process

- Process analysis overview
- Evaluation: establishing the control group
- Opportunity techniques: multi-discipline problem-solving
- Opportunity techniques: matrices

#### Building and Sustaining a Recommended Process

- Overview of the recommended process and beyond
- Impact analysis
- Recommended process
- Transition to the business case
- Return to proactive state

## Developing the Business Case

### Defining the Business Problem and Solution Scope

Business Analysts must be able to create business case documents that highlight project benefits, costs, and risks. The business case is based on the real business problem to be solved, and the business case documents become parts of proposals, feasibility studies, and other decision support documents.

This course teaches the purpose, structure, and content of a business case. It presents the basic techniques for determining financial return on investment, non-tangible benefits, and the probability of meeting expectations.

#### Prerequisites

No prerequisites: this course is suitable for both novices and experienced people who need to develop and justify the business case.

#### Course Level

Novice/Advanced

#### Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Establish the business case for the solution of a business problem
- Need to provide business justification for a solution

#### Performance Focus

- Business analysis
- Problem/Opportunity definition
- Defining solutions to business needs
- Feasibility study
- Business case development
- Return on Investment

#### What You Will Learn

You will learn how to:

- Prepare a business case
- Justify the business investment to solve the business need
- Perform feasibility studies and ROI analyses

#### Course Overview

##### Foundation Concepts

- The role of the business analyst
- An introduction to the BABOK® Guide
- The business analyst and the product/project life cycle
- The business case deliverable

##### Introducing the Business Case Process

- The business analyst and Strategy Analysis
- The business analyst and the business case process
- The business analyst during the business case process
- The business analyst after the business

case process

- Importance of defining solution performance metrics

##### Defining the Business Need

- Overview of defining the business need
- Business needs: problem/opportunity statement
- Product vision
- Objectives and constraints

##### Exploring Business Case Solutions

- Overview of exploring solutions
- Solution identification for feasibility
- Solution definition for analysis
- Assessing project risks

##### Justifying the Business Case

- Overview of justifying the business case
- Qualitative justification
- Quantitative justification

##### Approving the Business Case

- Overview of business case approval
- Developing recommendations
- Preparing the decision package - Documents
- Preparing the decision Package - Presentations

# Assuring Quality Through Acceptance Testing

Ensuring the Business Needs are Met

It is the business analyst's job to define the business problem to be solved by IT. It is also the business analyst's responsibility to confirm that the resulting solution developed by IT does, in fact, solve the defined problem. This is done first through testing, especially acceptance testing, and then through monitoring of the installed solution in the user community. The business analyst is not only concerned with the testing itself, but also with the management and monitoring of the users doing the acceptance testing, and recording, analyzing, and evaluating the results.

## Prerequisites

Basic understating of business analysis and software development

## Course Level

Intermediate/Advanced

## Who Should Attend

It is important for you to attend if you:

- Work as a business analyst
- Perform acceptance testing on behalf of the users
- Manage or monitor users performing acceptance testing
- Prepare test cases for system or acceptance testing
- Evaluate, analyze or record the results of acceptance testing
- Ensure that the product is accepted and used in the business community and solves the initial business problem it was intended to solve

## Performance Focus

- Acceptance testing
- System testing
- Creation of test cases and test scenarios
- Planning an acceptance test
- Confirmation of the business solution in the business environment

## Learning Objectives

Upon completion, participants will be able to:

- Create a set of acceptance test cases
- Manage and monitor an acceptance test stage where users perform the testing
- Work with the development team in the systems testing stage
- Assess the solution once it is in the business environment

## Course Overview

### Foundation Concepts

- The role of the business analyst
- An introduction to the BABOK® Guide
- BA roles and relationships through the project life cycle
- Introduction to assuring software quality through acceptance testing

### The Scope of IT Testing

- Overview of testing stages
- The testing process
- Testing documentation

### Pre-Acceptance Testing

- The BA's role in testing
- Early development testing stages (unit and integration)

- Late development testing stage (system)

### The Acceptance Test Stage - Part I (Planning, Design, and Development)

- Overview of user acceptance testing
- Acceptance test planning
- Designing user acceptance tests
- Developing individual user acceptance test cases
- Building effective user acceptance test scenarios

### The Acceptance Test Stage - Part II (Execution and Reporting)

- Operating guidelines
- Execution
- Reporting
- Post-Acceptance Testing
- Overview
- Project implementation
- Project transition (project closure)
- Production through retirement

### Testing Commercial Off-the-Shelf (COTS) Software

- Overview
- Selecting the software
- Implementing the software

## Summary

- What did we learn and how can we implement this in our work environments?

# Decision Making and Problem Solving

## Understanding and Applying Proven Techniques

The goal of this course is to build the decisiveness and problem-solving competency through knowledge and tools to enhance timely decision-making and problem-solving skills.

You will define the difference between decision making and problem solving, and explore interdependencies. You will consider different perspectives in defining what makes a good decision. You will practice using a three-step decision making model and analyze the effectiveness of the process of arriving at a decision and its impact. As part of a small group, you will evaluate a couple of different case studies and select which set of decision-making tools and techniques are most appropriate and then apply them to the scenario. You also will be introduced to a problem-solving model and supporting techniques, and explore applying them in a work-related context.

### Prerequisites

None

### Course Level

Basic

### Who Should Attend

- Anyone interested in improving the effectiveness of their decisions and solutions

### What You Will Learn

You'll learn to:

- Reinforce the importance of making a sound decision in a timely manner
- Select appropriate decision-making tools and techniques appropriate in different contexts
- Understand the concept of separating facts from perceptions
- Describe a structured problem-solving approach, some fundamental tools and perceptive questioning techniques

### Course Outline

#### Getting Started

- Welcome and introductions
- Participants' expectations
- Foundation Concepts
- Opening activity on decision making
- Results-driven competencies
- Group activity on decisiveness
- Key definitions

#### Recognizing Indecision

- The impact of indecision
- Decision-making issues
- Key drivers of good decision making
- Paired activity: Force field analysis
- How our thought processes work
- Cognitive bias and its effect on decision making
- Knowledge, Skills and Abilities (KSAs)
  - o Ladder of Inference
  - o Course of action

#### Decision-Making Models and Supporting Tools

- Successful decision-making criteria

- Small group activity: decision making
- Decision-making tools and techniques
  - o 3D Model - Define-Decide-Declare
  - o SRAM - Situation, Root Causes, Act, Monitor/Verify
  - o OAR - Objectives, Alternatives, Risks
  - o Decision-Making Checklist
  - o Decision Authority Matrix
  - o De Bono's Six Thinking Hats
  - o Pair-wise comparison
  - o Decision Tree Analysis
  - o KT Decision Model
- Activities: Small group practice using decision-making tools
- Translating requirements into action
- Problem Solving
- Defining the problem
- The importance of defining the real business problem
- Problem solving models
  - o PDCA - Plan, Do, Check, Act
  - o 6-Step Problem-Solving Wheel
  - o DMAIC - Define, Measure, Analyze, Improve, Control
  - o Lean Six Sigma
- Cause and Effect Analysis
  - o Ishikawa diagram
  - o The 5 Whys technique
  - o Quick hit improvements
- Divergent versus convergent thinking
- Activities: Small group practice using problem-solving tools

### Summary

- What did we learn, and how can we implement it in our work environments?

# Effective Communication Skills for Project Managers

## Blending Processes, Tools, and Interpersonal Skills

Communication is the single most critical success factor in projects. It provides the foundation for defining and managing project objectives and scope, planning project performance, and executing, controlling, and closing projects. This workshop gives project stakeholders at every level the performance edge to make their projects successful.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Basic/Intermediate

### Who Should Attend

- Those who lead project teams or work with managers, peers, customers, and/or vendors
- Project managers and members of a Project Management Office (PMO)

### Performance Focus

- Using role-play, case study-based exercises, and interactive dialogue to ensure that we address both practical and situational applications of communication concepts, principles and techniques
- Improving project performance and project management capability by learning effective communication skills, including:
  - Formal communication, such as documentation and reporting
  - The interpersonal aspects that are critical to conflict resolution and healthy team and individual relationships

### What You Will Learn

You'll learn how to:

- Gather and distribute the right information to the right people, through the right media, and at the right time to keep the project on track for successful completion
- Address the varying communication needs of project stakeholders and manage communication in a time- and cost-effective way
- Create a communication plan and obtain buy-in from the project team
- Listen in a focused, centered, and attentive fashion

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Foundational Concepts

- Communication: definition and process
- Communication: challenges in the project environment
- An Effective Project Communications (EPC) success model

#### Impact of Values on Effective Communication

- Overview of value-based impacts on communication
- Behavioral and thinking styles
- Paradigms and attitudes
- Responsiveness and Emotional Intelligence

#### Focus on Basic Communication Skills

- Overview of basic communication skills
- Basic oral - informal/conversations
- Basic written - informal/e-mail

- Basic written - formal/professional deliverables
- Basic written - formal/document Management

#### Focus on Interpersonal Communication Skills

- Overview of interpersonal communication skills
- Nonverbal skills (body, face, voice)
- Listening skills: focusing and filtering
- Skills for building trust: initiating individual relationships
- Skills for building trust: giving/receiving feedback

#### Focus on Team Communication Skills

- Overview of interpersonal communication skills
- Building trust with project teams
- Conducting project business: general meeting skills
- Conducting project business: specific project meeting tips
- Meeting major challenges: interacting within the virtual environment
- Meeting major challenges: respecting diversity

#### Impact of Infrastructure on Effective Communication

- Overview of infrastructure-based impacts

#### Practicing Situational Project

- Overview of practice environment
- Solution templates
- Situation debriefs

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Project Stakeholder Relationship Skills

## Improve Your Project Relationships

This two-day course is designed to provide project managers with the ability to:

- Analyze the complexities of major stakeholder relationship categories
- Apply the most appropriate interpersonal relationship skills to the different categories of relationships
- Align the dynamic needs of the stakeholders with a project's objective throughout the project life cycle

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Basic/Intermediate

### Who Should Attend

This program is designed for functional/line managers, program managers, project managers, and anyone who deals with various stakeholders on a regular basis

### Performance Focus

- Developing and refining interpersonal and communication skills to help you get the most out of your relationships with project stakeholders

### What You Will Learn

You'll learn how to:

- Examine traditional and non-traditional ways to identify and assess stakeholders
- Explain how competence, character, and trust lead to project success and strong relationships with stakeholders
- Utilize "Embodied Leadership" skills to build stakeholder relationships
- Apply stakeholder engagement best practices to case study and real-life scenarios

### Course Overview

#### Foundation Concepts

- Stakeholders and project success
- Stakeholder management research
- Managing stakeholder relationships

#### Identifying Stakeholders

- Stakeholder categories
- Stakeholder relationships across the project life cycle
- Tools and techniques for identifying stakeholders

#### Assessing Stakeholders

- Assessing stakeholder relationships
- Recognizing stakeholder attitudes toward the project
- Analyzing stakeholders
- Using other types of stakeholder assessments

#### Building Stakeholder Relationships

- The importance of psychological safety
- Building trust and getting results
- The anatomy of trust

#### Navigating Challenging Situations

- Dynamics of conflict
- Responding to conflict
- Managing difficult conversations

#### Summary

# Building High-Performance Teams

## Develop a Team Poised for Success

This course pulls together the most current and popular theories and writings on this complex topic, and presents an amalgamated view in a highly-interactive workshop using an activity-based approach. You will understand and gain the skills required to build and participate in high-performance project teams, and will obtain the insight needed to proactively affect change within your organizations. With these skills, you will learn how to transform your existing culture into one that promotes high performance.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Intermediate

### Who Should Attend

- Department heads
- Project and Program managers
- Team leaders

### Performance Focus

- Building and participating in high performance project teams
- Affecting positive change within your organizations
- Transforming your organizational culture into one that promotes high performance

### What You Will Learn

You'll learn how to:

- Define a team and describe the optimum team size for effective performance
- Describe characteristics and guiding behaviors of high-performance teams

- Describe the major elements of each development stage in two distinct models
- Recognize cultural barriers in achieving high performance
- List the attributes of a high-performing corporate culture
- Assess your own corporate culture
- Discuss corporate leadership as a factor in building high-performance project teams
- Describe the three A's of selecting team members
- Describe leadership responsibilities, styles, and roles
- List and describe the eight components of the team charter model for building high performance teams

### Course Overview

#### Getting Started

- Introductions
- Course delivery strategy
- Discussion: participant expectations
- Team activity: Building a Bridge

#### Foundational Team Concepts

- The nature of teams
  - The definition of a team
  - Types of teams
  - Does the size of the team matter?
- Characteristics of high-performance teams
- Guiding behaviors of high-performance teams
- Team activity: Characteristics of High-

#### Performance Teams

- Purpose and values
- Empowerment
- Relationship and communication
- Flexibility

- Optimal performance
- Recognition and appreciation
- Morale

#### Understanding Team Development

- Stages of team development - Model 1
- Stages of team development - Model 2
- Team activity

#### Designing a High-Performance Culture

- Corporate cultures
  - Cultural characteristics
  - The cost of culture
  - Designing high-performance cultures
  - Assessing your culture
- Corporate leadership
- Leadership tips

#### Establishing the Attributes of High Performance

- Choosing the right people
- Team effectiveness
- Team leadership
  - Leadership responsibilities
  - Leadership styles
- The Team Charter model
  - Team vision, purpose, and values
  - Team norms
  - Team member roles
  - Key responsibility areas and goals
- Communication strategies
- Decision-making, authority, and accountability
- Resources
- Team activity

#### Summary

- What did we learn, and how can we implement this in our work environments?

# Leading Cross-Cultural Virtual Teams

## Meet Project Objectives Through Effective Global Virtual Teaming

High-performing teams are a must in this world of intense competition and higher expectations. Global virtual teaming has become a necessity as organizations become increasingly distributed and suppliers and clients actively engage in joint projects. Teams work across geographical and organizational boundaries to deliver solutions and services to global users where distance and differences, both geographic and cultural, amplify the effect of issues and factors that are relatively straightforward when managing a team of people in the same location.

This course delivers practical concepts and techniques that participants will start using immediately on their global projects.

### Prerequisites

Good understanding of project management

### Course Level

Intermediate/Advanced

### Who Should Attend

This program is designed for program managers, project managers, team leaders, and others responsible for managing and working on cross-cultural global projects or tasks and with teams that work predominantly in virtual mode. Different versions of the course can be presented to participants at different management levels within an organization. Participants should have

experience working on or managing projects that span cultural and/or geographical boundaries.

### What You Will Learn

The primary goal of this course is to provide project managers with the knowledge and skills to recognize and address the range of issues and pressures that are unique to global, remote, and virtual team leadership. The workshop will address effectively working across time zones and countries, embracing cultural and personal diversity and making the most of virtual technologies. By the end of the course, participants will be better equipped to successfully lead in the fast-paced, ever-changing global business world.

### Course Overview

#### Foundation Concepts

- Basic definitions
- Critical success factors for Learning Cross-Cultural Virtual Teams
- A road map to success for Leading Cross-Cultural Virtual Teams

#### Leadership Excellence in any Project Environment

- Leading Effectively in a Global Environment
- The GLOBE Study: 6 Leadership Styles
- Transformational Leadership
- The LCCVT Success Model
- Four Components of Transformational Leadership
  - o Idealized Influence
  - o Inspirational Motivation

- o Individualized Consideration
- o Intellectual Stimulation

#### Leveraging Personal Diversity

- Overview of Personal Diversity
- The Mind Styles™ Model
- Multiple Intelligences
- Connecting Transformational Leadership and Personal Diversity

#### Embracing Cultural Diversity

- Introduction to Cultural Intelligence
- The Impact of Culture
- Body Language and Proxemics
- Cultural Dimensions Theory
- The Culture Map - Eight Scales Mapping Culture

#### Managing Virtual Diversity

- Overview of Virtual Diversity
- The Six Centrifugal Forces of Virtual Teams
- Virtual Time Management
- Virtual Processes and Technology
- Virtual Leadership
  - o Virtual Distance Model
  - o Trust and Virtual Teams

#### Creating an Environment for Success

- Supporting a CCVT-Friendly Environment
- Building a Foundation of Trust
- Developing a Team Charter
- Creating Your Personal Action Plan

#### Summary

- What did we learn and how can we implement this in our work environments?

# Conflict Resolution for Project Managers

## Strengthen Your Leadership and Communication Skills

The human factor is a major challenge in every project. If conflicts and negative behavior are affecting your team's ability to work cooperatively toward its goal, then this workshop is a must for you!

Successful people must, as Stephen Covey suggests, "be proactive, think win-win, seek first to understand and then to be understood." This workshop provides you with the day-to-day tools to become a highly successful person and leader.

The goal of this course is to provide you with the skills to first set the context for and diagnose specific conflict situations, and then to evaluate and implement "enlightened" (win/win) solutions.

### Prerequisites

Basic project management training or equivalent experience

### Course Level

Intermediate/Advanced

### Who Should Attend

- Project and team leaders, executives, supervisors, managers, union leaders, program managers
- Anyone else who wants to be more successful in working with others

### Performance Focus

- Achieving a personal conflict paradigm shift

- Aligning conflict stakeholders' expectations
- Agreeing on specific paths to conflict resolution
- Identifying demands versus needs in the context of a common objective
- Neutralizing potential resistance and surfacing assumptions
- Addressing barriers and generating solutions
- Agreeing upon a win/win solution
- Developing a plan to implement the solution
- Harnessing the value from the conflict and celebrating the results

### What You Will Learn

You'll learn how to:

- Describe the three stages of an enlightened conflict resolution process
- Explain how selected personal and interpersonal leadership theories and techniques support this process
- Identify specific points where project management techniques complement the enlightened process
- Practice selected techniques to achieve declaration and definition outcomes
- Develop and pursue a personal action plan for improving your ability to achieve disposition outcomes

### Course Overview

#### Getting Started

- Introductions
- Course structure

- Course goals and objectives

### Foundation Concepts

- Successful project team relationships
- Conflict and project team performance
- Traditional conflict resolution approaches
- A more structured approach to conflict resolution - Theory of Constraints
- Enlightened conflict resolution process

### Declaration Stage

- Declaration stage overview
- Personal commitment
- Common ground
- Accepted process
- Practicing declaration

### Definition Stage

- Definition stage overview
- Conflict containment
- Exposed barriers
- Potential solutions
- Practicing definition

### Disposition Stage

- Disposition stage overview
- Solution synergy
- Solution roadmap
- Stakeholders' enlightenment
- Practicing disposition

### Summary

- What did we learn, and how can we implement this in our work environments?

# Grateful Leadership™

Using the Power of Acknowledgment® to Engage All Your People and Achieve Superior Results

Effective leaders must find ways to enhance people's level of engagement, commitment, and support, especially during the difficult periods of time that all organizations may face.

Grateful leaders can tap into the power of personal commitment and dedication by acknowledging people in an authentic and heartfelt manner. Those leaders who model true acknowledgment behavior will inspire others to do the same and to want to dramatically increase their levels of contribution to the organization, making the power of acknowledgment transformational.

## Prerequisites

There are no prerequisites for this course.

## Course Level

Basic/Intermediate

## Who Should Attend

- Senior and middle level managers who want to improve their leadership skills by using acknowledgment to enhance their interpersonal and communication capabilities
- Junior managers who are being prepared for higher levels of leadership
- Those with hands-on supervisory or managerial experience and responsibility
- Employees who have a current or impending role as an organizational change agent

## Performance Focus

- Linking effective leadership and employee engagement
- Strengthening interpersonal relationships

- Motivating team members and stakeholders
- Developing personal leadership capabilities
- Assessing personal acknowledgment skills

## What You Will Learn

You'll learn how to:

- Understand and develop the capability to act upon the need for Grateful Leadership to create a culture of appreciation in the workplace
- Understand the potentially huge benefits of Grateful Leadership in the workplace
- Overcome the barriers to using acknowledgment
- Demonstrate the language and subtleties of authentic and heartfelt acknowledgement behavior
- Describe the Seven Principles of Acknowledgment for "High-Interest Benefits" in the context of participant's personal leadership style
- Describe how to coach teams, managers, and other corporate stakeholders in using Grateful Leadership to produce breakthrough results

## Course Overview

### Getting Started

- Introductions
- Course goals and objectives
- Introspection on the practice of Grateful Leadership

### The Workforce Engagement Sustainability Challenge

- Employees who are engaged, not engaged, and actively disengaged

- The costs of non-engagement
- Meeting the workforce engagement challenge

## Acknowledgment, Engagement, and Leadership

- Acknowledgment and its benefits
- Recognition versus acknowledgment
- "Challenging people" case study
- Blanchard, Covey, Keith (Servant Leadership): how acknowledgment fits into these leadership models
- Leadership and acknowledgment
- The 5 C's - Consciousness, Courage, Choice, Communication, Commitment

## Employing the Power of Acknowledgment

- Overcoming barriers to acknowledgment
- The Seven High-Interest Benefits Principles of Acknowledgment
- Exploring the acknowledgment process

Applying the Principles of acknowledgment within the Context of your personal leadership style

- Case study
- The ROI of Grateful Leadership
- Creating your Grateful Leadership Personal Action Plan™
- Creating a Vision Statement for your organization that incorporates Grateful Leadership into your corporate culture
- The 360° Grateful Leadership Competency Assessment

## Summary

- What did we learn, and how can we implement this in our work environments?

# Lean Six Sigma Yellow Belt Certification Program

## Build a Knowledge Base of the Facets of Lean Six Sigma

This course is designed to instill an in-depth understanding of Lean Six Sigma and give you a clear sense of what is required to define high impact improvement projects. It will help you establish Lean Six Sigma measurements and complete Lean Six Sigma projects using the systematic and proven Define, Measure, Analyze, Improve, and Control (DMAIC) methodology.

This course offers you the perfect opportunity to demonstrate your foundational understanding of process management and improvement through the IIL Lean Six Sigma Yellow Belt Certification.

### Prerequisites

A basic understanding of quality

### Course Level

Basic

### Who Should Attend

- Anyone interested in learning the fundamental principles, concepts, and terminology of Lean Six Sigma
- Executives, managers, support employees, account managers, sales representatives, and operational managers who support Lean Six Sigma (either internally or externally)
- Employees about to join a Lean Six Sigma team

### Performance Focus

- Learning the fundamental aspects of the three main facets of Lean Six Sigma:
  - It is a Business Management Strategy that aligns your organization through clearly defined roles and responsibilities; it also provides a comprehensive set of measurements to help align projects with strategic objectives

- Secondly, it measures the capability of any process to determine the ability to deliver products and/or services without defects
- Finally, it is a rigorous methodology to improve or redesign critical processes
- Learn, practice, and apply the basic concepts, tools, and techniques necessary for process improvement

### What You Will Learn

You'll learn how to:

- Establish the structure that supports and sustains Lean Six Sigma Quality
- Identify and calculate key Lean Six Sigma Measurements (Sigma, DPMO, and Yield)
- Select successful, high-impact projects that match with strategic objectives
- Document, measure, and improve key processes using the DMAIC methodology
- Utilize data-based thinking to make key business decisions

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Introduction to the Fundamentals and Vision of Lean Six Sigma

- Lean Six Sigma's focus on the customer, on quality, and on results
- The costs of poor quality
- Critical factors to consider when deploying Lean Six Sigma
- Lean Six Sigma as a process improvement methodology
- Lean Six Sigma metrics
- Why do it - return on investment (ROI) and payback for Lean Six Sigma
- Business Process Management
- Critical Lean Six Sigma roles and

responsibilities

- Main aspects of managing the organizational change
- Project selection

### Metrics of Lean Six Sigma and the DMAIC Model

- How to strategically align business metrics and projects within an organization
- How to identify and measure quality characteristics that are critical to customers
- What does the customer (internal or external) really want from our products and services?
- Establishing appropriate teams and setting those teams up to be successful
- What defines a good measurement system?
- How are we doing? (the secret to measuring the right things correctly)
- How to improve output measures by understanding and measuring the process
- Where are there defects? (how to properly select and scope high-impact projects)
- Where is the process broken? (the Lean Six Sigma version of root cause analysis)
- How to determine the process efficiency, or value add, of a process
- The appropriate use of quality tools
- Understanding the concept of variation and how to reduce knee-jerk reactions
- How to achieve breakthrough results for any key measure
- How can we ensure the identified improvements will be sustainable? (the basics of process control)

### Summary

# Lean Six Sigma Green Belt Certification Program

## Become Green Belt Certified

Green Belt is not just a role, it is also a competency required for leadership positions at many top companies. This learning series is designed to enable you to fulfill the important role of a Lean Six Sigma Green Belt and to incorporate the Lean Six Sigma mindset into your leadership skills.

You will learn how to collect data and turn it into useful information using SigmaXL® statistical software - provided at no additional cost. Using a real-world project focus, the series will teach the fundamental methodology, tools, and techniques of the Define, Measure, Analyze, Improve, and Control (DMAIC) Process Improvement Methodology.

### Prerequisites

A basic understanding of quality

### Course Level

Intermediate

### Who Should Attend

- Process experts
- Team members
- Project leaders who will lead smaller projects
- Individuals who will support Black Belts with data collection
- Future leaders who want to learn this valuable skill set

### Performance Focus

- Recognizing how to select high-impact projects that align to organizational

objectives and strategy

- Deciding when, why, and how Six Sigma tools and techniques are used to identify and eliminate defect drivers
- Deciding when, why, and how Lean tools and techniques are used to improve speed in critical business processes

### What You Will Learn

You'll learn how to:

- Select high-impact projects
- Identify and measure critical customer requirements
- Identify and collect non-biased data
- Identify current process capability
- Analyze data Using SigmaXL statistical software
- Determine high-impact root causes
- Design and test solutions
- Make improvements sustainable
- Determine the difference between Common and Special Cause Variation

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Introduction to Lean Six Sigma Project Selection

#### Define

- Introduction to Define
- Project planning
- Process management

- The Voice of the Customer
- Define summary

#### Measure

- Introduction to Measure
- Data collection
- Graphical statistics for continuous data
- Graphical statistics for discrete data
- Variation concepts
- Process capability
- The cost of poor quality
- Measure summary

#### Analyze

- Introduction to Analyze
- Process analysis
- Cause and effect
- Advanced analysis
- Analyze summary

#### Improve

- Introduction to Improve
- Generating and selecting solutions
- Design of experiment
- Error-proofing
- Project management fundamentals
- Standardization
- Piloting and verifying results
- Improve summary

#### Control

- Introduction to Control
- Statistical process control
- Transition planning

#### Summary

# Project White Belt® 2013

## Getting Started with Microsoft® Project 2013

This workshop serves as an introduction to the interface and features of Microsoft Project 2013. It is kept up to date with the framework of knowledge outlined by the Project Management Institute (PMI)® *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*.

This course will be led by an IIL-certified instructor who will outline the benefits of Microsoft Project, provide tips on using various features and common shortcuts, recommend guidelines and discuss the application of scheduling concepts to manage project work.

### Prerequisites

None

### Course Level

Basic

### Who Should Attend

- Project managers and scheduling practitioners
- Anyone new to Microsoft Project
- Anyone with a need to use scheduling software
- Individuals in a project management career path who need to sharpen their scheduling skills
- Users who manage projects in Excel, PowerPoint and SharePoint

### Performance Focus

- Setting up a project with Microsoft Project 2013
- Navigating and sharing information with Microsoft Project 2013
- Building practical project management skills and proficiencies
- Preparing you for IIL's Project White Belt certification exam

*This course also enables participants to practice and start preparing for Microsoft's Exam 74-343: Managing Projects with Microsoft Project 2013.*

### What You Will Learn

You'll learn how to:

- Define key scheduling concepts and terms
- Effectively navigate the user interface and interpret common views
- Configure essential elements of a new schedule
- Enter and modify a task list
- Record unplanned or partially planned activities
- Set dependencies between tasks
- Create a basic resource list and generate assignments
- Format targeted areas of the Gantt Chart view
- Prepare the schedule for printing

### Course Overview

#### Getting Started

- Introductions
- Course objectives
- Course outline

#### Navigating the User Interface and Views

- Navigate and use the Ribbon
- Use and customize the Quick Access Toolbar
- Modify general and display options
- Become familiar with major elements on the Project screen

- Navigate Gantt Chart, calendar and network diagram views

- Search for a help topic

#### Setting up a New Schedule

- Create new schedules
- Create a new schedule using existing information
- Enter and modify the schedule start date

- Enter and modify exception days in the calendar

#### Entering, Modifying, and Outlining Task Data

- Enter, edit, correct and clear information
- Enter unscheduled tasks
- Enter duration estimates for a single task or multiple tasks
- Organize tasks
- Set up a multi-level outline
- Add notes to tasks

#### Creating Dependencies by Setting Links

- Identify a critical path in a simple schedule
- Understand how scheduling software calculates a critical path
- Describe dynamic schedules and dependencies
- Create links using various methods
- Display the critical path

#### Entering and Assigning Resources

- Plan for resources
- Create a list of available resources
- Assign resources

#### Formatting Gantt Chart View

- Format text and Gantt Chart bars
- Format a collection of items
- Configure print options

#### Communicating Information

- Creating a Basic Timeline View
- Rich Data Exchange
- Printing Views
- Creating Basic Reports
- Creating Excel, PDF, and XPS Files
- Hands-on Exercise

#### Summary

# Microsoft® Excel® in Depth

## Becoming Proficient in the Details of Excel

This practical course gives you a solid background in the features of Excel, as well as a deeper understanding of the best ways to use Excel.

This is not a beginner's course in Excel. You will learn advanced features such as Pivot Tables, Charting, Tables, Sorting, Filtering, Functions, and more.

The goal of this course is to give you a deeper understanding of the intricacies of Excel, and a new ability to use it efficiently to produce the solutions they are seeking.

### Prerequisites

A solid working knowledge of Excel and a desire to become more knowledgeable about its features and benefits

### Course Level

Intermediate/Advanced

### Who Should Attend

- Anyone with a basic working knowledge of Excel who wishes to enhance their understanding of the many features of Excel and when to use them

### Performance Focus

- Gaining a deeper understanding of the advanced functions within Excel
- Learning how to use Excel to “tell the right story” with your data

### What You Will Learn

You'll learn how to:

- Use functions like IF, AVERAGE, SUMIF, SUMIFS, SUMPRODUCT, INDEX, MATCH, CHOOSE, DATE, and many more
- Create meaningful charts
- Use Pivot Tables
- Use Conditional Formatting and Data Validation
- Take advantage of using Named ranges, do sorting, filtering, tables

### Course Overview

#### Getting Started

- Introductions
- Course structure
- Course goals and objectives

#### Excel Overview

- Excel Functions - VLOOKUP, IF, INDEX, MATCH, CHOOSE, SUMIF, SUMIFS, SUMPRODUCT, DATE, and many more
- Using Named ranges, Data Validation, Sorting, Filtering
- Learn the Name Manager
- Learn the difference between local and global names
- Ensure correct access to linked workbooks
- Ensure data accuracy
- Learn how to use cascading data validation (for example, once a user chooses “cars”, another cell allows only Ford, Toyota, etc )
- Sorting by more than 3 fields
- Filtering by font, pattern, or value
- See your data based on things like dates in the third quarter, or fields where quantity x price is greater than some fixed value

#### Conditional Formatting and Data Formatting

- Make relevant data stand out
- Isolate highs and lows
- Make error cells invisible
- Learn about Data bars and Icon sets
- Color Scales
- Highlight differences between worksheets
- Learn all the codes in the Format/Number list, like #,##0 00\_);(##,##0 00)
- Using cell styles
- Learn all about alignment, protection, borders, colors, and more

#### Pivot Tables

- How to summarize large amounts of data with a few clicks
- Learn various ways of presenting the data
- Pivot table tools
- How to customize and format a pivot table to suit your needs
- How to group data
- Using the various options to present your data

#### Charts

- Learn how to create a chart with one keystroke
- The 11 types of built-in charts

- How to customize the charts to make the information tell the right story
- Using the design, layout, and formatting available to charts in Excel
- Embedded charts versus chart sheets
- How to modify all the pieces of a chart

#### Array formulas

- Learn how to use the most powerful formulas in Excel
- How to combine many formulas into one compact array-formula
- Learn the real power of these formulas and why regular formulas can't do the job
- Using built-in array formulas, like TREND or TRANSPOSE

#### Summary

- What did we learn, and how can we implement this in our work environments?