

## Workshops

Synergy has been educating working professionals since 2002. Instructors are experienced practitioners and have extensive adult education experience. Please contact us with questions about which workshop is right for your group, to schedule a date, or to discuss customized topics.

### **Portfolio and Program Management**

	Title	Length	Instructor
1	Aligning Projects and Strategy: Introduction to Portfolios and Programs	1 day	Oltmann
2	Portfolio Management: Linking Organizational Strategy to Execution	2 days	Oltmann
3	How to Manage Integrated Programs	2 days	Oltmann

### **Project Management**

	Title	Length	Instructor
4.	Executive Briefing on Managing Projects	1 day	Oltmann
5.	Project Sponsorship	½ day	Oltmann
6.	Foundations and Best Practices of Project Management	2 days	Oltmann or Ridder
7.	Practical Projects for Ordinary People	½ - 1 day	Oltmann
8.	Managing Multiple Projects	1 day	Oltmann

### **Communication, Team, and Leadership Skills**

	Title	Length	Instructor
9.	Improving Cross Cultural Communication on Projects	1 day	Ridder
10.	Creating Effective Technical Presentations	½ day	Oltmann
11.	Communications and Stakeholder Management	1 day	Oltmann
12.	Managing Project Teams	1 day	Oltmann
13.	Project Leadership	1 day	Oltmann

### **Facilitation**

	Title	Length	Instructor
14.	Facilitation Basics	2 hours	Oltmann
15.	Applied Facilitation	1 day	Oltmann

### **Specialized Project Practitioner Topics**

	Title	Length	Instructor
16.	Developing Project Schedules	1 day	Oltmann
17.	Project Execution and Control	1 day	Oltmann
18.	Project Risk Management	1 day	Oltmann
19.	Project Integration Management	1 day	Oltmann

### ***Customized Topics***

Synergy has extensive expertise in the following areas. If you don't see what you want in a standard workshop, contact us about customized training especially for your needs.

- strategy deployment
- operational excellence
- enterprise project and program management
- effective portfolio management and governance
- management of engineering, product development, and operations
- soft skills for program and project managers

### ***1. Aligning Projects and Strategy: Introduction to Portfolios and Programs (1 day)***

Leaders must balance multiple simultaneous projects, constantly making imperfect tradeoffs between conflicting needs. This course is an introduction to program and portfolio management, two disciplines that focus on effectively coordinating multiple projects. Program management coordinates a set of projects that must be integrated tightly to achieve a single objective, while portfolio management looks at a large collection of projects as an investment in achieving strategic objectives.

This course can be used as a standalone overview or as the foundation for more detailed courses on program management and portfolio management. It is customizable to meet the needs of a specific organization.

### ***2. Portfolio Management: Linking Organizational Strategy to Execution (2 days)***

Management teams must constantly make decisions about how to apply limited resources. Organizations as diverse as Intel, Hershey, and the US Government have found that portfolio management is an essential part of the answer. This advanced course looks at current techniques and best practices for managing project portfolios. Portfolio management is a proven method of looking broadly across an organization to invest in the right projects and coordinate their execution. It integrates projects and programs, aligns them with strategic direction, links strategy and execution, and makes the best use of limited resources.

You will learn real-world best practices in project portfolio management. Your instructor will also identify typical gaps in portfolio management and show how you can deal with them. You will participate in hands-on exercises as well as plenty of interaction with the instructor and other class participants.

This course is customizable to meet the needs of a specific organization.

### **3. How to Manage Integrated Programs (2 days)**

Developing complex solutions often requires close coordination between multiple projects. Programs are a proven method to carry out this coordination. Like a conductor who leads an orchestra in a grand symphony, a program combines separate projects into a cohesive production. This advanced course explores the details of how to manage programs. It is customizable to meet the needs of a specific organization.

### **4. Executive Briefing on Managing Projects (1 day)**

This briefing examines, from a manager's point of view, how to use projects to link organizational strategy to action. It covers the essential elements of an effective project management system, examines how project management integrates with other management functions, and shows how to be an effective management sponsor for specific projects.

Participants will learn:

1. How to use projects to create action that aligns with strategic objectives
2. The most important roles related to projects
3. Why project management frameworks are important and what they look like
4. Key project management techniques that they should insist on in their organization
5. How to increase the success of a project using sponsorship

### **5. Project Sponsorship (1/2 day)**

This facilitated discussion is for leaders who are sponsoring or will soon sponsor projects. It begins with an overview of the responsibilities of a successful project sponsor, drawn from both from the project management literature and from experience. This is followed by open discussion of common questions and tips, such as:

- What does it mean to be a sponsor? How engaged should a sponsor be in the day-to-day activities of the project?
- How to handle competing priorities.
- What questions to ask of a project team and other project stakeholders. What to communicate.
- How to help project teams overcome roadblocks.
- Ensuring that teams are making good progress in the right direction.
- How to avoid the most common mistakes that sponsors make.

## **6. Foundations and Best Practices of Project Management (2 – 3 days)**

Modern projects are in the clutches of constant pressure. They must deliver more with less, while meeting short schedules and tight budgets. Unfortunately, too many projects fail at this challenge. This class shows you how to organize small to medium size projects, then work with a team to accomplish them on schedule and within budget. Participants learn practical and proven project management techniques, then immediately apply them to real projects as in-class teams.

Topics include:

- Starting a project on a firm foundation by defining it clearly, then getting alignment among the stakeholders
- Visual tools for building a good plan that addresses the how, when, and who of the project
- Executing the plan, monitoring progress, steering, and making changes
- Keeping a project adaptable and flexible
- Properly closing a project, including how to learn lessons for future improvement

The class includes proven techniques researched by the Project Management Institute, the global professional body for project management. It can be delivered in person, completely online using cloud-based collaboration technologies, or as a hybrid.

## **7. Practical Projects for Ordinary People (half or full day)**

Eighty-six percent of projects are late. Many cost more than twice their original budget before they are finally done. Learn how you can use simple, proven project management techniques to deliver your projects on time, on budget, and with successful outcomes.

Learn:

- Six characteristics of successful projects
- Most common and expensive project mistakes
- Tools and techniques for success in the 4 key steps of every project
- How to synchronize project management responsibilities with ongoing operational demands

## **8. Managing Multiple Projects (1 day)**

Few leaders have the luxury of focusing on a single project. Instead, they must balance multiple simultaneous projects, constantly making imperfect tradeoffs between conflicting needs.

This class looks at the personal skills you need to manage multiple projects. However, there is only so much you can do on your own. Therefore, this class also looks at the supporting organizational framework that enables a project-based organization to do many projects. It also includes a short introduction to portfolio management, which is a technique for deciding which projects to invest in.

## **9. Improving Cross Cultural Communication on Projects (1 day)**

Projects involving people from many cultures can be exciting and rewarding, but they are also more prone to the confusion that can hold a project team back. Even using English as a shared language does not lead to clarity, since all people, including native speakers, apply their own culture to it. Similarly, business norms and expectations are far from standardized when spread across time zones and continents, even within the same organization.

On top of it all, the time pressure and constant change that comes with projects serves only to intensify any misinterpretations of words, values, and practices. These misunderstandings can erode trust and relationships, ultimately impacting project results and morale. Effective global project managers can align themselves and their team to:

- Set a solid foundation for awareness, intention, and engagement.
- Discover surprising cultural barriers and how English speakers can mislead.
- Identify tools and strategies to create their own unique team culture.
- Appreciate and capitalize on the intricacies of cross-cultural collaboration.

The ultimate goal of cross-cultural collaboration is to not only grow and strengthen the quality of the project, but also individual and team performance through the shared achievement.

This highly interactive class workshop teaches practical steps that align project teams, improving efficiency and reducing misunderstandings. It provides tools and techniques that can be used immediately to create a cohesive team culture.

## **10. Creating Effective Technical Presentations (1/2 day)**

This half-day workshop shows participants the essentials of creating an effective technical presentation. In the workshop, participants start preparing their presentations.

The workshop covers:

1. How to organize your presentation and backup material
2. How to gather relevant content for your presentation
3. Effective delivery techniques
4. Using PowerPoint to help rather than harm
  - a. Pacing of your slides
  - b. How to use pictures and graphics to convey technical ideas
  - c. Slide layout and formatting
  - d. PowerPoint tricks

Exercises and examples are interspersed throughout.

## **11. Communications and Stakeholder Management (1 day)**

Projects live in an environment of conflicting priorities, scarce resources, and competition. Much of what your project needs is not within your direct control. Effective communication and

stakeholder management are keys to success in this environment. They help your project compete for resources, get support, and avoid pitfalls.

This workshop uses lectures, case studies, and exercises to show you how to identify and engage key stakeholders, build good working relationships, and design effective project communications. It also addresses managing conflict, escalating issues, and using email and meetings effectively.

*Note: this class can be expanded to include material on geographically distributed teams, leveraging varied interaction styles, and delegation.*

## **12. Managing Project Teams (1 day)**

This skills class focuses on the “soft skills” side of how to manage project teams. It is custom assembled to meet the needs of your project organization. Topics may include the following, or other topics that are important to you.

- project team leadership skills
- interaction styles
- geographically distributed teams
- delegation, responsibility assignment, and negotiating commitments
- acquiring and developing team members
- organizational change management
- retrospectives
- sources of power

## **13. Project Leadership (1 day)**

Poor leadership is an important reason why projects fail. According to research published in the Project Management Journal, successful project managers must combine technical competency with the ability to lead. The more responsibility a project manager has, the more crucial leadership skills are to his or her success. Even very experienced project managers have room to improve their leadership skills. This workshop will show you key elements of successfully leading a project, including getting commitments and accountability, facilitating team meetings, influencing others, and delivering unwelcome news.

## **14. Facilitation Basics (2 hours)**

It’s impossible to avoid meetings. Strategic planning, task force meetings, project meetings, brainstorming sessions, planning and coordination meetings – the list is endless. Sadly, many meetings are unproductive and horribly run. This short workshop introduces the fundamental concepts of meeting design, meeting management and process facilitation.

This workshop is designed for anyone who participates in meetings. It can be delivered either in person or completely online.

## **15. Applied Facilitation (1 day)**

Skilled facilitators turn agonizing meetings, whether in person or online, into effective meetings. This workshop builds on the overview from the Facilitation Basics workshop above but goes deep into hands-on application of core facilitation practices and techniques in specific contexts. It is designed for people who facilitate complex meetings and important planning or problem-solving sessions. Topics included in this highly interactive workshop include:

- How to design a facilitated session
- Core techniques for facilitating ideation, analysis, and selection
- Techniques for increasing participation
- How to “herd cats” into making forward progress
- How to use questions and language effectively
- Facilitating decision-making
- Ensuring follow-up

This workshop is designed so that it can be delivered in person or completely online using cloud-based collaboration technologies.

## **16. Developing Project Schedules (1 day)**

Inaccurate project schedules cause a lot of pain. They may cause projects to run out of funding, burn out people by trying to achieve unrealistic deadlines, or deliver results too late to meet the critical needs of the customer. But it is not easy to develop accurate, defensible schedules – just look at how often we get them wrong.

This workshop walks project managers and team members through pragmatic steps for developing a project schedule, including how to get a good understanding of what work the project has to do, identifying dependencies, and using appropriate estimating techniques. It also covers controversial topics such as adding buffer, handling multitasking, and making tradeoffs. Finally, it includes special techniques to use when the project is subject to a lot of uncertainty, such as in research and development.

### **Topics**

1. How to build a good definition of the work to be done
2. Identifying and preparing for dependencies
3. Estimating how long things will take - techniques and pitfalls
4. How to create good milestones
5. Adding buffer to schedules
6. Deciding how to handle multitasking
7. Balancing constraints
8. Creating a baseline schedule
9. Schedule development techniques for uncertain environments
10. Panel, exercises and case work

## **17. Project Execution and Control (1 day)**

You can do all sorts of great planning, but ultimately projects are about getting things done. This workshop uses lectures, case studies, and exercises to show you pragmatic techniques for executing and controlling a project. Guide your project team to do the work that they've planned out, set up a project GPS to monitor progress, and make course corrections. And since things rarely stay stable, learn how to keep your project flexible so it can respond to changing conditions.

### **Topics**

1. Getting it done: how to coordinate and drive project work
2. Monitoring and communicating progress
  - a. Formal and informal measurement methods
  - b. Communicating status information
  - c. Holding reviews
3. Steering the project
  - a. Making tradeoffs
  - b. Resolving issues and escalations
  - c. Managing changes
4. Staying flexible enough to respond to changing conditions
5. Panel, exercises and case work

## **18. Project Risk Management (1 day)**

Many projects fail because of inadequate risk management. This interactive workshop allows you to try easy-to-use techniques for identifying, prioritizing, and acting on risks. You will learn how to:

- Compare and contrast various strategies for dealing with risks.
- Identify, classify, and prioritize risks for a project.
- Assess and respond to identified risks that have sufficient priority.
- Demonstrate how to monitor and control project risks with various resolution strategies.
- Increase the resiliency of projects that are in turbulent and fast-changing environments.

## **19. Project Integration Management (1 day)**

Project managers must integrate all elements of a project together. They are the “superglue” of the project team, bonding the disparate pieces into a valuable whole. This workshop looks at the major activities in the PMBOK *Integration Management* knowledge area, spanning the full project lifecycle. It includes:

1. Pros and cons of predictive, adaptive and iterative approaches
2. Techniques for initiating a project
  - a. Starting a project on a firm foundation by defining it clearly, then getting alignment among the stakeholders



- b. Clearly identify how the project aligns with the mission and strategy of the organization
  - c. Writing a charter and a business case
  - d. Progressive elaboration
  - e. Holding a kickoff
3. Executing, monitoring and controlling project work
  - a. Measuring progress with formal and informal measurement techniques
  - b. Managing changes
  - c. Dealing with issues and escalations
  - d. Increasing organizational learning by planning and running retrospectives

## ***20. Using Quality Management to Gain a Competitive Edge (1 day)***

Quality is the difference between delivering mediocre project results and truly delighting customers. High quality makes customers want to return. It leads to higher profits and to projects that you can be proud to work on. How can you use best practices to reliably ensure high quality on every project, rather than just hoping for the best?

This one-day class offers both seasoned and novice project managers insight and tools for building a quality management perspective into projects, including satisfying stakeholders, managing based on facts, and empowering performance.

It covers:

- Learning from the Gurus: Deming, Juran, Ishikawa, Taguchi
- Four Core Concepts of Project Quality
- Understanding Quality Systems (PDCA, Total Quality Management, ISO 9000, 6 Sigma, Lean)
- How Quality Management Complements Project Management
- Quality Management Tools and Techniques
- PMI's Processes for Project Quality