

ATD Workshop Series

PROJECT MANAGEMENT training



**Includes All the Activities, Handouts, Tools, and Assessments
You Need to Create and Deliver Powerful, Effective Training**

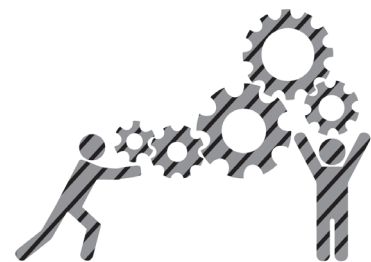
WES BALAKIAN

ATD Workshop Series

PROJECT MANAGEMENT training

WES BALAKIAN, PMP

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The ATD Workshop Series

Whether you are a professional trainer who needs to pull together a new training program next week, or someone who does a bit of training as a part of your job, you'll find the ATD Workshop Series is a timesaver.

Topics deliver key learning on today's most pressing business needs, including training for change management, coaching, communication skills, customer service, emotional intelligence, facilitation, leadership, new employee orientation, new supervisors, presentation skills, project management, and time management. The series is designed for busy training and HR professionals, consultants, and managers who need to deliver training quickly to optimize performance now.

Each ATD Workshop book provides all the content and trainer's tools you need to create and deliver compelling training guaranteed to

- **enhance** learner engagement
- **deepen** learner understanding
- **increase** learning application.

Each book in the series offers innovative and engaging programs designed by leading experts and grounded in design and delivery best practices and theory. It is like having an expert trainer helping you with each step in the workshop process. The straightforward, practical instructions help you prepare and deliver the workshops quickly and effectively. Flexible timing options allow you to choose from half-day, one-day, and two-day workshop formats, or to create your own, using the tips and strategies presented for customizing the workshops to fit your unique business environment. Each ATD Workshop book also comes with guidance on leveraging learning technologies to maximize workshop design and delivery efficiency and access to all the training materials you will need, including activities, handouts, tools, assessments, and presentation slides.

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ABOUT ATD

Foreword

In 2002, we launched the ASTD Trainer's WorkShop Series—a collection of books authored by practitioners that focused on the design and delivery of training on popular soft-skills topics. The creation of this series was a departure for us. These workshops-in-a-book were created to help internal trainers expedite their program delivery by using appropriate and exceptionally designed content that could be adapted and repurposed.

These topics, dealing with issues ranging from customer service to leadership to manager skills, continue to be important training programs offered in companies and organizations of all sizes and across the globe. The ASTD Trainer's WorkShop Series has helped more than 60,000 trainers and occasional trainers deliver top-notch programs that meet business needs and help drive performance.

And while many things about the delivery of soft skills training have not changed in the last decade, there have been advances in technology and its use in training. So, when we began talking about how to refresh this popular series, we knew we needed to incorporate technology and new topics. We also wanted to make sure that the new series was cohesively designed and had input from author-practitioners who are, after all, the heart and soul of this series.

Inside *Project Management Training* by Wes Balakian, and each of the titles in the series, you'll find innovative content and fresh program agendas to simplify your delivery of key training topics. You'll also find consistency among titles, with each presented in a contemporary manner, designed by peers, and reflecting the preferences of training professionals who conduct workshops.

We hope that you find tremendous value in the ATD Workshop Series.

Tony Bingham
President & CEO
Association for Talent Development (ATD)
November 2016

Preface

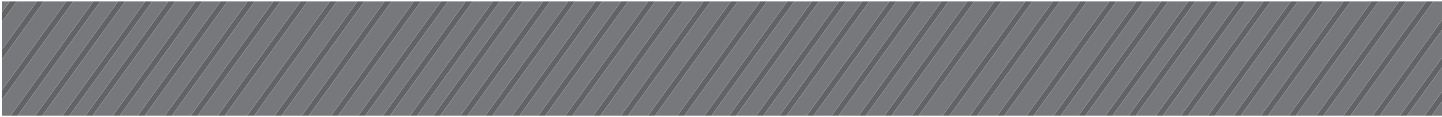
In the competitive “need it now” business environment, organizations are looking for an edge that can help them deliver products and services faster and cheaper while maintaining high quality and brand integrity. In the past 20 years as a consultant, trainer, speaker, author, and strategic advisor to global organizations, I’ve determined that a prime ingredient to scalability, predictability, and consistency in any organization or industry is having a proven method or process to deliver projects and their products and services on time, in budget, and within scope—that is, project management.

When leaders make job functions easier and help employees understand how their work relates to business results and to the work of others in the organization, they increase morale, engagement, and productivity for everyone in the organization. Employees become committed to a success larger than just their specific jobs. Project management training can help organizations establish standard processes, documentation, and language throughout the organization to ensure that projects deliver results and the organization thrives.

Not all templates, methods, or processes will work for every organization but understanding the fundamentals of project management is an important start for employees and teams. The workshops in this book are not meant to be used as test preparation. They are designed from the perspective of “healthy” project management—using just the right amount of project management to achieve your desired results. This book is chock-full of easy-to-use templates and tools that the learners can put to work right away. The activities give provide opportunities to practice the concepts in small and large groups reminiscent of their work teams.

Despite increased competitive pressure, fluctuating economies, and the chaotic pace of change, healthy project management has proven to be one constant in business success. I have designed these workshops to help project managers and their teams improve performance, which will help their organizations maintain a competitive edge. The methods and tools have worked for my clients and customers—and they will work for your employees—project managers and project team members alike.

Wes Balakian
CEO, True Solutions Inc.
Fairview, Texas
November 2016



Introduction

How to Use This Book

What's in This Chapter

- Why project management matters
 - What you need to know about training project managers
 - Project manager skills and competences
-

Why Is Project Management Training Important?

Nearly everything we do in our professional and personal lives is a project of some sort. Whether it is rolling out a new product or initiative, collaborating on a team, or planning a vacation, a good understanding of how to deliver a project on time, in budget, and within scope is the formula for success. In today's complex, interconnected world, organizations need predictable, repeatable, and scalable workforces that can maintain the blistering pace of change—precisely what project management gives employees the tools and know-how to do.

Managing projects requires the ability to set clear objectives, report, project plan, work collaboratively, navigate uncertainty, and monitor and control project outcomes. Project managers need to be adept at motivating and influencing a diverse group of people, sometimes dispersed geographically, to accomplish a common objective or goal. (Oh, and by the way, just because your job title does not have the words *project manager* in it doesn't mean that you are not performing the role of a project manager.) Project managers must know how to communicate, coach, train, listen, and deliver results while working with people from different cultures, age groups, backgrounds, and knowledge. Layered on top of these attributes they must also be leaders, able to balance priorities, scope, budget, schedule, organizational value, people skills, planning, and organizational skills. In short, project managers need a comprehensive set of knowledge, skills, and attributes to be effective.

That is a tall order. What does it take to properly prepare others to manage the countless projects in their organizations and lives?

Many people who are cast in the role of a project manager have not been formally trained nor do they have a complete understanding of what project management is. Many successful project managers came up through the ranks, learning what works over time by trial and error. That is how I came to the field of project management. In many ways, experience is the best teacher, though sometimes a harsh and unforgiving one. But learning how to do your job over time without understanding the reasons why you are successful will not produce repeatable, predictable, and scalable results. It will produce habits, which, as we know, can be either good or bad.

Moreover, project management is an expansive field, touching every type of organization and industry. No one training program can begin to cover all the details and nuances of the job (for example, we dedicate only one learning activity to communications management, when entire books have been written on that topic.)

So, the workshop agendas in this book focus on grounding participants in the foundational project management concepts and methods and giving them opportunities to practice the concepts working in teams. The workshops are *not* exam prep courses, but they will help participants to feel comfortable delivering a successful project on their own. They will come away with effective methods and tools to put to work back at their jobs.

Whether you choose the half-day, full-day, and two-day program, you will find the resources and tools you need to create engaging, interactive sessions that will enable your participants to deliver business results using project management best practices. Each of the agendas can be used as a stand-alone workshop, or they can be used in succession, each building on the other to explore aspects of project management. Combine all three, and you have a career path program, if your organization decides to pursue project management as a core competency for talent development. The programs can provide an introduction to the field that can lead to further training and even certification through an organization such as PMI (Project Management Institute).

Is there more to learn about project management than is presented in these workshops? Absolutely. Developing project management skills is a journey. It takes time, practice, and experience. The workshops in this book offer solid training programs to give participants the knowledge and resources they will need along the way. Remember that project management is a formal method of delivering business results—and project management *training* is a key component in enabling employees to deliver those results effectively.

Everything you do to prepare for and deliver this workshop needs to model these skills. Spend time building your understanding of project management methods and practice them in your preparation, design, delivery, and follow-up of this workshop.

What Do I Need to Know About Training?

The ATD Workshop Series is designed to be adaptable for many levels of both training facilitation and topic expertise. Circle the answers in this quick assessment that most closely align with your state of expertise.

QUICK ASSESSMENT: HOW EXPERT DO I NEED TO BE?			
Question	Authority	Developing Expertise	Novice
What is your level of expertise as a facilitator?	• More than 5 years of experience • Consistently receive awesome evaluations • Lead highly interactive sessions with strong participant engagement	• From 1 to 5 years of experience • Catch myself talking too much • May feel drained after training • Participants sometimes sit back and listen instead of engage	• Less than 1 year of experience • No idea what to do to be successful • Eager to develop a facilitative style
How proficient are you with the topic?	• Well versed • Have taken courses • Read books/ authored articles • Created training materials • Am sought out by peers on this topic • It is my passion	• On my way • Have taken courses • Read books • Created workshop materials • Would benefit from the book's support tools	• I can spell it! • Had a course in school • Received feedback from respected colleagues indicating I have a natural inclination for this topic (but feel a bit like an imposter)

Two-fold novice: Your best bet is to stick closely to the materials as they are designed. Spend extra time with the content to learn as much as possible about it. Read the examples and sample stories, and plan examples of your own to share. Also, closely read Chapter 8 on training delivery, and consider practicing with a colleague before delivering the program. Take comfort in the tested materials you are holding and confidence in your ability to apply them!

Developing your expertise in one or both areas: Logical choices for you may include using the outline and materials, and then including material you have developed that is relevant to

the topic *and* your participants' workplace needs. Or, take the core content of the materials and revise the learning techniques into interactive approaches you have used with success in the past. Play to your strengths and develop your growth areas using the resources in this volume that complement your existing skills.

Authority twice over: Feel free to adapt the agendas and materials as you see fit and use any materials that you have already developed, or simply incorporate training activities, handouts, and so forth from this volume into your own agenda. Enjoy the benefits of ready-to-use processes and support tools and have fun tailoring them to your preferences and organizational needs.

How Much Time Will Preparation Take?

Putting together and facilitating a training workshop, even when the agendas, activities, tools, and assessments are created for you, can be time consuming. For planning purposes, estimate about four days of preparation time for a two-day course.

What Are the Important Features of the Book?

Section I includes the various workshop designs (from two days to a half day) with agendas and thumbnails from presentation slides as well as a chapter on customizing the workshop for your circumstances. The chapters included are

- Chapter 1. Two-Day Workshop (15 hours program time) + Agenda + PPT (thumbnails)
- Chapter 2. One-Day Workshop (7.5 hours program time) + Agenda + PPT (thumbnails)
- Chapter 3. Half-Day Workshop (3 to 4 hours program time) + Agenda + PPT (thumbnails)
- Chapter 4. Customizing the *Project Management Training* Workshop.

The workshop chapters include advice, instructions, workshop at-a-glance tables, as well as full program agendas.

Section II is standard from book to book in the ATD Workshop Series as a way to provide a consistent foundation of training principles. This section's chapters follow the ADDIE model—the classic instructional design model named after its steps (analysis, design, development, implementation, and evaluation). The chapters are based on best practices and crafted with input from experienced training practitioners. They are meant to help you get up to speed as quickly as possible. Each chapter includes several additional recurring features to help you understand

the concepts and ideas presented. The Bare Minimum gives you the bare bones of what you need to know about the topic. Key Points summarize the most important points of each chapter. What to Do Next guides you to your next action steps. And, finally, the Additional Resources section at the end of each chapter gives you options for further reading to broaden your understanding of training design and delivery. Section II chapters include

- Chapter 5. Identifying Needs for Project Management Training Training
- Chapter 6. Understanding the Foundations of Training Design
- Chapter 7. Leveraging Technology to Maximize and Support Design and Delivery
- Chapter 8. Delivering Your Project Management Training Workshop: Be a Great Facilitator
- Chapter 9. Evaluating Workshop Results.

Section III covers information about post-workshop learning:

- Chapter 10. The Follow-Up Coach

Section IV includes thumbnail versions of all the supporting documents for reference and online guidance for accessing the documents online:

- Chapter 11. Learning Activities
- Chapter 12. Assessments
- Chapter 13. Handouts
- Chapter 14. Project Manager Toolkit
- Chapter 15. Online Supporting Documents and Downloads.

The book includes everything you need to prepare for and deliver your workshop:

- **Agendas**, the heart of the series, are laid out in three columns for ease of delivery. The first column shows the timing, the second gives the presentation slide number and image for quick reference, and the third gives instructions and facilitation notes. These are designed to be straightforward, simple agendas that you can take into the training room and use to stay on track. They include cues on the learning activities, notes about tools or handouts to include, and other important delivery tips.
- **Learning activities**, which are more detailed than the agendas, cover the objectives of the activity, the time and materials required, the steps involved, variations on the activity in some cases, and wrap-up or debriefing questions or comments.
- **Assessments, handouts, and tools** are the training materials you will provide to learners to support the training program. These can include scorecards for games, instructions, reference materials, samples, self-assessments, and so forth.

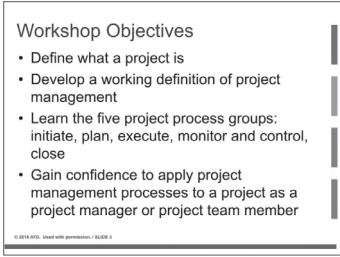
- **Presentation media** (PowerPoint slides) are deliberately designed to be simple so that you can customize them for your company and context. They are provided for your convenience. Chapter 7 discusses different forms of technology that you can incorporate into your program, including different types of presentation media.

All the program materials are available for download, customization, and duplication. See Chapter 15 for instructions on how to access the materials.

Half-Day Workshop Agenda

Half Day: (8:00 a.m. to 12:00 p.m.)

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
8:00 a.m. (5 min)	Slide 1 	Welcome and Introductions Welcome the participants as they enter the room and briefly introduce yourself. Make an effort to talk to each person, which will set the tone for the session and begin to model communication as a primary skill for successful project management. Note the usual housekeeping items such as restroom locations and breaks.
8:05 a.m. (10 min)	Slide 2 	Learning Activity 1: My Project Management Story This icebreaker partner activity will help you get a sense of your participants' level of experience with project management and what their learning needs are. It will also help your participants get to know each other better. To help participants interact with each other, divide the group into pairs and have them interview each other using the same set of questions. Then have each pair introduce each other to the group. NOTE: To conduct this activity in the time allotted, follow the instructions in the learning activity but skip steps 1 and 2 and start the activity at step 3.

TIMING	SLIDES	ACTIVITIES/NOTES/CONSIDERATIONS
8:15 a.m. (5 min)	Slide 3 	Workshop Objectives Introduce the topic of project management to the participants. Make the point that they use project management every day—even though they may not call it that. Just about everyone is a project manager based on the definition of a project (unique, temporary, defined start and finish, progressively elaborated). Doctors, police officers, attorneys, veterinarians, teachers and more all deliver and manage projects. Briefly present the objectives at a high level. Let the participants know that the workshop will need to cover a lot of information, but there will be interactive opportunities to practice the concepts they are learning with each other in small groups. Explain that the session will introduce them to basic project management terminology and processes and will help them develop several key project management skills they will need to lead a project or participate as a project team member. (Slide 1 of 1)

How Do I Use This Book?

If you’ve ever read a “Choose Your Own Adventure” book, you will recognize that this book follows a similar principle. Think back to the self-assessment at the beginning of this introduction:

- If you chose *authority*, you can get right to work preparing one of the workshops in Section I. Use Section II as a reference. Many of the chapters in Section II feature a sidebar or other information written by the author who has much experience in the topic under consideration. This advice can help guide your preparation, delivery, and evaluation of training.
- If you chose *developing expertise*, read Section II in depth and skim the topic content.
- If you chose *novice at training and the topic*, then spend some serious time familiarizing yourself with both Sections I and II of this volume as well as the topic content.

Once you have a general sense of the material, assemble your workshop. Select the appropriate agenda and then modify the times and training activities as needed and desired. Assemble the materials and familiarize yourself with the topic, the activities, and the presentation media.

Key Points

- The workshops in this book are designed to be effective at all levels of trainer expertise.
- Good training requires an investment of time.
- The book contains everything you need to create a workshop, including agendas, learning activities, presentation media, assessments, handouts, and tools.

What to Do Next

- Review the agendas presented in Section I and select the best fit for your requirements, time constraints, and budget.
- Based on your level of expertise, skim or read in depth the chapters in Section II.
- Consider what kind of follow-up learning activities you will want to include with the workshop by reviewing Section III.

Additional Resources

Biech, E. (2008). *10 Steps to Successful Training*. Alexandria, VA: ASTD Press.

Biech, E., ed. (2014). *ASTD Handbook: The Definitive Reference for Training & Development*, 2nd edition. Alexandria, VA: ASTD Press.

Emerson, T., and M. Stewart. (2011). *The Learning and Development Book*. Alexandria, VA: ASTD Press.

McCain, D.V., and D.D. Tobey. (2004). *Facilitation Basics*. Alexandria, VA: ASTD Press.

Piskurich, G. (2003). *Trainer Basics*. Alexandria, VA: ASTD Press.

Stolovitch, H.D., and E.J. Keeps. (2011). *Telling Ain't Training*, 2nd edition. Alexandria, VA: ASTD Press.



LEARNING ACTIVITY 1

My Project Management Story

Objectives

Participants will be able to

- get to know each other better
- identify their current level of experience with project management
- share what they expect to learn over the course of the workshop.

Materials

- Pens and paper for note taking
- Sticky notes, one per participant
- Flipchart and easel or chart paper posted on the wall

Time

30 minutes

Instructions

1. Distribute sticky notes to participants or place sticky notes pads at each table. Give participants 3 or 4 minutes to answer the four questions on the slide. For the final question, ask participants to write their idea of success on the sticky notes provided.
2. When everyone has completed the questions, ask them to post their sticky notes on the flipchart or chart paper. Briefly review the answers on the notes with the group and let participants know that you will be referring back to the chart as the workshop touches on the topics and ideas they identified.
3. Then divide the group into pairs.



LEARNING ACTIVITY 1, continued

4. Tell participants they will be interviewing their partners as a way to help the group get to know each other.
5. Allow 5 minutes for everyone to interview their partners using the questions on the slide. Ask them to be prepared to introduce their partners to the group and share one or two of their answers to the questions.
6. After 5 minutes, reconvene the group and ask each pair to introduce each other to the rest of the group.
7. No debriefing is needed for this activity.

About the Author



Wes Balakian, PMP, is CEO of True Solutions Inc., a Dallas-based global project management consulting and training organization. He is a published author, accomplished speaker, strategic facilitator, and program manager delivering strategic planning and program management consulting services to a variety of organizations including military, nonprofit, governmental, and commercial entities throughout the world. During his career, he has been a management consultant, a college professor, a corporate executive, and a business owner. Before founding True Solutions Inc., he held management positions with several *Fortune* 100 companies and served as a senior strategic planning and performance management consultant and advisor to the office of the chief information officer of many global corporations.

As a strategic facilitator Wes has worked with boards of directors and executive management to develop strategic initiatives that have delivered positive results to global 1000 companies. Wes's innovative style has helped him become a proven leader in program management, portfolio management, project planning, and delivery of business solutions across industries. He is well versed in corporate culture and strategic alignment as it relates to organizational maturity, business process, logistics, and manufacturing and is known for his practical expertise as a successful mentor and facilitator. His experience includes development of critical business process improvement strategies and short-and long-term strategic planning for executive management teams. He has extensive knowledge in implementation and management of complex, business-to-business process solutions for client relationship management and workforce optimization. Wes has consulted or worked for many global organizations, including J.P. Morgan, Texas Instruments, Verizon, MCI, EDS, Flowserve, Cisco Systems Inc., Hewlett-Packard, and others.

As a true project management evangelist with a long history of volunteerism, Wes has been instrumental in changing the way program and project management is delivered, perceived, and globally received. His award-winning programs have been taught and used by dozens of

organizations, including Oracle, Saudi Telecom, Aramco, Shell, Ericson, MBFS (Mercedes Benz Financial Services), Sabre, Delta Airlines, U.S. Department of Defense, U.S. Air Force, U.S. Department of Homeland Security, General Services Administration, Federal Reserve Bank, the City of Dallas, and many others. He has authored several books on project management and PMP exam preparation. He has been a contributing leader of the PMI since 1999 and has held board positions throughout his tenure at PMI.

Wes holds an Advanced Master's Certificate in Project Management from George Washington University's School of Business. He recently graduated from PMI's Leadership Institute Masters Class in Budapest.

Buy This Book!