



Business Execution Essential Series

½ DAY REAL-TIME VIRTUAL ▪ 1 DAY CLASSROOM

VERSION 1.0

About Business Execution Essential Series

o Overview:

- o Perhaps the single greatest challenge facing nearly all organizations is the ability to execute: to do the right things and do them well. Studies repeatedly show the poor state of business execution:
 - The success of strategy implementation stands at roughly 10%, according to a series of recent studies by both academics and practitioners
 - IT project success rate is only 29% according to the latest Standish Chaos report in 2015
- o As a leader in project management and business execution, PMO Advisory is creating a vital series of essential courses addressing various challenges and elements of business execution. These include, but not necessarily limited to project, program, portfolio, agile, risk, and service management along with organizational change management.
- o Collectively, these course form the very foundation in which organizations can start to embark on a journey to achieve execution excellence.

o Listing:

#	Name	Slide #	Half Day Virtual			One Day Classroom			Remarks
			Fee	PDU's	Schedule	Fee	PDU's	Schedule	
1	Strategic Business Execution	3-4	\$ 199	4	9/8/16	\$ 699	8	10/3/16; 1/9/17	Provide broad overview of PMI and related certifications
2	Portfolio Management	5-6	\$ 299	4	10/13/16	\$ 699	8	1/12/17	
3	Program Management	7-8	\$ 249	4	10/17/16	\$ 659	8	1/11/17	
4	Project Management	9-10	\$ 169	4	9/15/16	\$ 599	8	1/10/17	
5	Project Management Office (PMO)	11-12	\$ 199	4	9/14/16	\$ 699	8	9/12/16	Full 4.5 days course on 10/31-
6	Risk Management	13-14	\$ 169	4	10/24/16	\$ 599	8	1/13/17	
7	Organization Change Management (OCM)	15-16	\$ 299	4	10/26/16	\$ 799	8	1/14/17	Includes license to use the selective templates

Note: Unless otherwise specified, all virtual classes are from 1 – 5 PM Eastern Standard Time and all classrooms are from 9 AM to 5 PM Eastern Time. The Project Management Half Day Virtual is from 11-3 PM. For more dates, visit our course calendar at www.pmoadvisory.com/training/calendar.

1. Strategic Business Execution Essentials

○ Overview:

- The state of strategy execution is dismal as numerous experiences and studies showed that 90% of strategies fail due to poor execution. The reasons underpinning these challenges are many: poor strategy and planning, inadequate resources and capabilities, weak project management, unacceptable levels of adoption, etc.
- Based on our internal research and best practices across industries, this course provides an integrated and holistic framework that organizes the various competencies, disciplines, processes, and behaviors required to achieve execution excellence. It strives to weave the major knowledge areas across disciplines including project management, service management, project management office (PMO), and organizational change.
- Integrated within this course is a roadmap for professionals seeking to further their interest and careers by pursuing a deeper understanding of these disciplines and their associated professional certifications.

○ Course Description:

- The purpose of this workshop is to address these fundamental questions:
 - Why 90% of strategies fail to realize their value?
 - What does execution excellence look like? How to achieve it?
 - How do the various disciplines, like project management, service management, and organizational change come together?
 - Which discipline and associated disciplines should you consider as a business professional?
- This course will provide an overall framework across ten major disciplines/certifications including: Project Management Professional (PMP & CAPM), Agile Management (PMI-ACP & SCRUM), Program Management (PgMP), Portfolio Management (PfMP), Risk Management (PMI-RMP), Service Management (ITIL), Project Management Office (PMO), and Organization Change.

○ Target Audience:

- The target groups for this course are:
 - Business and technical professionals who are responsible for strategy execution
 - Project professionals who are responsible for project delivery and wish to develop a holistic view
 - Operational professionals who need to understand the challenges of projects but also the requirements for handoffs to operations
 - Executives in high-risk, high-visibility industries who want to improve their organization's ability to implement strategy successfully

○ Course Fees, Dates, and Professional Development Credits:

- Fees and PDUs:
 - HALF Day - \$199; 4 PDUs (2 Technical, 1 Leadership, 1 Strategic)
 - ONE Day - \$699; 8 PDUs (4 Technical, 2 Leadership, 2 Strategic)

○ Registration:

- To register for this class, contact us at cert@poadvisory.com or register directly at www.poadvisory.com/training/registration/.

More Course Information

1. What is Strategic Business Execution (SBE)

- Introduction to strategic planning and implementation
- Current state
- Opportunities and threats

2. ExecutionIndex®

- Important attributes
- Research findings
- Secrets of achieving execution excellence

3. Framework for SBE

- Behavior and attitude
- Individual core competencies
- Disciplines and knowledge areas
 - Project , program, and portfolio management
 - Agile project management
 - Risk management
 - Project management office (PMO)
 - Service management frameworks
 - Organization change
- Achieving sustainable execution excellence

Additional Information:

This course is primarily based on our firm's research working with our clients. It combines the best and latest of academic research with industry best and common practices. The insights generated from the Strategic Business Execution research are sprinkled throughout the course.

Since business execution is a broad and complex topic, we designed this course to mainly address personal interest of the participants to help them develop a macro and integrated perspective of the many challenges, along with determining the best roadmap for their professional development, whether it is to pursue a certification in project or program management or to learn more about adoption and organizational change.

Why Consider PMO Advisory? Four simple reasons:

- We are the most comprehensive project management certification firm in the world today.
- For our bootcamps, we are so confident of our methodology that we offer the “[Complete Support Promise](#)” which includes up to 12 months of support and our “Money-Back Guarantee” - best in the world.
- Our products and services are highly innovative, creating new and value added products and services such as SBE certification training, our own Intelicamp®, the largest test bank, & our [Mega Bootcamps](#)
- PMO Advisory is different than most firms because we are driven by our mission and business goals. Our social mission, helping professionals maximize their potential and the philosophy to “be extraordinary” leads us to offer a BIG list of [free stuff](#). We also offer a “[Special Consideration](#)” program for selective groups of professionals and we “waive” up to 60% of our fees.

About PMO Advisory LLC

PMO Advisory is one of the most specialized firms in the world focusing on project management, IT service management, and business management. In addition to offering training for all ITIL certifications, the firm also offers project management training including portfolio (PfMP®), program (PgMP®), project (PMP®, CAPM®, PRINCE2®, and MSP®), risk (PMI-RMP®), project management office (PMO), and agile project (PMI-ACP® and SCRUM) training. Our headquarter is next to Montclair, NJ with training sites in NYC (near Wall Street) and NJ (near Montclair and in Jersey City). The firm services consumers, businesses, government institutions, and universities.

What differentiates PMO Advisory is its depth and service delivery, including one of the best warranties in the marketplace. Its focus is on developing innovative products such as bundling online learning modules, and its mission-driven aspirations as a B-Corp. The firm's instructors are highly experienced and certified professionals and industry experts. In most cases, they are also college professors, guest speakers or lecturers.

2. Portfolio Management Essentials

o Course Overview:

- Studies have consistently shown organizations today fail to implement their strategies. The failure rate differs among studies, but even the most optimistic puts the failure rate at 50% with some studies showing it as high as 90%. One of the primary reasons for strategy implementation failure is poor project investment selection and poor organizational focus. This results in significant waste and ineffective use of precious assets and resources.
- Confronting the issue of investment selection and prioritization as well as limited resources, organizations must work “smarter” by focusing their limited resources on the most important and highest priority endeavors. PMI created the Portfolio Management Professional (PfMP®) credential in 2014 mainly focused on addressing this major gap in organizational project management.
- Portfolio management is the discipline of selecting, approving, and directing optimal active investment opportunities including projects, programs, operational engagements, and other endeavors. Portfolio managers require a deep understanding of organizational strategy and its alignment with execution, a well-honed governance structure to support and reinforce decisions (which may not always be popular), analyze capabilities including resource capacity and skills, manage communication, and embrace risk.

o Course Description:

- The Portfolio Management Essentials course provides a broad overview of portfolio management. Starting with strategy, the course presents portfolio management as the bridge that connects planning with action. The course will discuss important frameworks, key concepts, useful tools and techniques, case studies, and an overview of the latest PMI certification in portfolio management (PfMP).
- The course content is based on PMO Advisory’s consulting methodology and the latest industry and professional development. It will be led by certified portfolio professionals. The benefits for participants are immense. Not only will the participants learn about the essentials of portfolio management, but they will also learn how to apply the selective principles, tools, and techniques.
- This course is delivered in two formats:
 - The HALF DAY virtual course is instructor-led, real-time, and delivered via web conferencing technology.
 - The ONE DAY physical classroom course is also instructor-led, real-time and delivered in physical classrooms or conference centers around the world. The One Day course will have more time for Q&A, networking, diving deeper into selective topics, and practicing selective tools, techniques, and templates.

o Target Audience:

- The target groups for this course are everyone who works in portfolio management environments including:
 - Project and PMO professionals who are helping their organizations with project investment decisions
 - Project leaders who are managing large quantities and pools of resources and wish to move into the driver seat
 - Financial, marketing and operational professionals who work closely with project managers in their organization and who also influence and contribute to the strategy implementation process.
 - Up and coming project professionals who are ready to take the next leap into mid- to upper-level leadership
- We also have seen a high number of senior project professionals who are “accidental project managers” and who have grown beyond PMP. This is an excellent introductory course for those who are considering the Portfolio Management Professional (PfMP) certification.

o Course Fees, Dates, and Professional Development Credits:

- Fees and PDUs:
 - HALF Day - \$299; 4 PDUs (2 Technical, 1 Leadership, 1 Strategic)
 - ONE Day - \$699; 8 PDUs (4 Technical, 2 Leadership, 2 Strategic)

o Registration:

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More Course Information

Course Content:

- About Project Management Institute and Portfolio Management Essentials
- Portfolio Management Introduction
- Portfolio Management Process Groups and Knowledge Areas
- Portfolio Strategic Management
- Portfolio Governance Management
- Portfolio Performance Management
- Portfolio Communication Management
- Portfolio Risk Management
- PfMP Certification and PMO Advisory Portfolio Management Training Courses

Additional Information:

The Portfolio Management Essentials course is designed as an introductory course for project and portfolio professionals working in portfolio management. This course provides valuable information to project professionals who are considering the Portfolio Management certification (PfMP), but this course is not the bootcamp for preparing for the PfMP certification.

PMO Advisory offers multiple types of bootcamps: PfMP Intelicamp that is delivered virtually and PfMP Classroom course for a more traditional experience. For information on our exam preparation courses, please visit us at www.pmoadvisory.com/pfmp or simply contact us.

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- For our bootcamps, we are so confident of our methodology that we offer the “[Complete Support Promise](#)” which includes up to 12 months of support and our “Money-Back Guarantee” - best in the world.
- Our products and services are highly innovative, creating new and value added products and services such as PfMP certification training, our own Intelicamp®, the largest test bank, & our [Mega Bootcamps](#)
- PMO Advisory is different than most firms because we are driven by our mission and business goals. Our social mission, helping professionals maximize their potential and the philosophy to “be extraordinary” leads us to offer a BIG list of [free stuff](#). We also offer a “[Special Consideration](#)” program for selective groups of professionals and we “waive” up to 60% of our fees.

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3. Program Management Essentials

o Overview:

- o Programs are not just larger projects, which is a common misconception. Programs are multiple individual but related endeavors to create new capabilities or new and often complex products. Organizations utilize program management to achieve benefits that are not obtainable by managing projects discretely.
- o Program management shares much of the same knowledge and skills as project management, but there are clear differentiations such as program governance, dependency management, financial considerations, and a great need to ensure alignment with organizational strategy.
- o For project professionals, program management is a natural career progression beyond managing projects. If you are a proven and strong project manager valued by your organization, it may be inevitable that you start to play program management roles as you grow in your organization.

o Course Description:

- o The Program Management Essentials course provides the basic foundation of program management. In addition to discussing the similarities and differences between project, program, and portfolio management, this course focuses on providing audiences with the understanding to more effectively manage programs and work with project managers.
- o Based on a combination of our consulting methodology and PMI Standards for Program Management, the course covers the major performance domains, lifecycle, concepts, tools, and techniques.
- o This course is delivered in two formats:
 - The HALF DAY virtual course is instructor-led, real-time, and delivered via web conferencing technology.
 - The ONE DAY physical classroom course is also instructor-led, real-time and delivered in physical classrooms or conference centers around the world. The One Day course will have more time for Q&A, networking, diving deeper into selective topics, and practicing selective tools, techniques, and templates.

o Target Audience:

- o The target groups for this course are everyone who works in program management and large projects including:
 - Project and PMO professionals who are playing important roles in programs and large projects
 - Project leaders who are examining better ways to manage complexities that are beyond project managers
 - Financial, marketing operational, and other functional professionals who work closely with project managers in their organization and who also influence and contribute to the strategy implementation process
 - Up and coming project professionals who are ready to take the next leap into program management in their organization
- o This is an excellent introductory course for those who are considering the Program Management Professional (PgMP) certification

o Course Fees, Dates, and Professional Development Credits:

- o Fees and PDUs:
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o Registration:

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More Course Information

Course Content:

- About Project Management Institute and Program Management Essentials
- Program Management Introduction
- Program Management Performance Domains
- Program Performance Domain
- Program Strategic Alignment
- Program Benefits Management
- Program Governance Management
- Program Life Cycle Management
- Program Supporting Processes
- PgMP Certification and PMO Advisory Program Management Training Courses

Additional Information:

The Program Management Essentials course is designed as an introductory course for project and program professionals working on larger projects and programs. This course provides valuable information to project professionals who are considering the Program Management certification (PgMP), but this course is not the boot camp for preparing for the PgMP certification.

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4. Project Management Essentials

- **Course Overview:**
 - Since the 1980's, organizational resources dedicated to projects have increased steadily. Today, with greater intensity due to technology changes, global competition, more stringent regulations, and greater customer expectations, projects have become the main mechanism for organizations to execute strategy and deliver value.
 - Organizational projects are ubiquitous, ranging from the launch of the next i-device to construction of bridges, the pace of our society today is driving greater changes.
 - Yet, even with the last few decades of the rapid development of project management and an increase in the number of project management practitioners, the project success rates have largely remained constant across the last decade.
 - Project management is the important discipline of initiating, planning, implementing, and managing one-time endeavors. To use an analogy, imagine cooking in an open pot versus a pressure cooker. Both will eventually do the job, but when the environment is highly constrained with severe limitations on schedule, cost, and requirements, then the normal way of cooking may be too slow and too undisciplined.
- **Course Description:**
 - The Project Management Essentials course provides a broad overview of project management including the key terms and concepts. Starting with organizational goals and objectives, the course presents project management as an engine for completing the endeavor. The course will discuss important frameworks, useful tools and techniques, case studies, and an overview of the latest PMI certifications in project management (CAPM and PMP).
 - The course content is based on PMI's Project Management Body of Knowledge (PMBOK®) and PMO Advisory's consulting methodology and the latest industry standards and professional development. It will be led by certified project professionals. The benefits for participants are immense. Not only will the participants learn about the essentials of project management, but they will also learn how to apply the selective principles, tools, and techniques.
 - This course is delivered in two formats:
 - The HALF DAY virtual course is instructor-led, real-time, and delivered via web conferencing technology to audiences around the world.
 - The ONE DAY physical classroom course is also instructor-led, real-time and delivered in physical classrooms or conference centers around the world. The One Day course will have more time for Q&A, networking, diving deeper into selective topics, and practicing selective tools, techniques, and templates.
- **Target Audience:**
 - The target groups for this course are anyone who is interested in project management and/or working on project teams. This includes:
 - General project stakeholders such as project team members, team leads, and resource managers
 - Business and functional professionals who are managing or working on projects, especially large and complex projects
 - PMO managers who are managing large numbers of projects who wish to improve project management across their organizations
 - Up and coming project professionals who want to sharpen their skills, capabilities, and credentials in managing projects
 - This is an excellent introductory course for those who are considering the Project Management Professional (PMP) certification or the Certified Associate in Project Management (CAPM) certification.
- **Course Fees, Dates, and Professional Development Credits:**
 - Fees and PDUs:
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More Course Information

Course Content:

- Project Management Framework
- Project Integration Management
- Scope Management
- Time Management
- Cost Management
- Quality Management
- Human Resources Management
- Communication Management
- Risk Management
- Procurement Management
- Stakeholder Management
- Professional Responsibility
- Key Project Management Terms
- PMP Certification and PMO Advisory Project Management Training Courses

Additional Information:

The Project Management Essentials course is designed as an introductory course for project professionals working in the field of project management as a team member or other stakeholders.

This course provides valuable information to project professionals who are considering the Project Management certification (PMP) and Certified Associate in Project Management (CAPM), but this course is not a bootcamp for preparing for the PMP/CAPM certifications.

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- PMO Advisory is different than most firms because we are driven by our mission and business goals. Our social mission, helping professionals maximize their potential and the philosophy to “be extraordinary” leads us to offer a BIG list of [free stuff](#). We also offer a “[Special Consideration](#)” program for selective groups of professionals and we “waive” up to 60% of our fees.

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5. Project Management Office Essentials

○ Overview:

- High-performing Project Management Offices (PMOs) are more than three times as likely as their low-performing peers to reach their full potential in contributing business value to their organizations.
- In 2012, a survey from PMI (2013) showed that PMOs completed an average of US \$100 million worth of projects. Additionally, they delivered around US \$71 million in value by way of revenue increases and/or cost reductions.
- The problem is that less than 33% of PMOs reach the full potential which indicates a limited understanding in how PMOs should be defined not only at the project, program and portfolio levels but also what they do, how they do it, and the configuration that optimally supports the organizational needs of today, and tomorrow.
- The importance and value of PMOs is becoming self-evident. Today, about 80% of the Fortune and Global 500 companies have one or more PMOs in their organizations.

○ Course Description:

- This course provides an introductory overview of the latest in academic research and professional best practices across the project, program and portfolio (strategic) areas in a PMO framework that will allow the attendees to understand the building blocks of project, program and portfolio management, success factors, success criteria, PMO types, and their evolution.
- This course will also provide an overview of the PMO Certifications for all levels of project professionals, from team members participating in PMOs to experts establishing PMOs.

○ Target Audience:

- The target groups for this course are:
 - Project professionals who are leading or managing projects in organizations with an intense project environment
 - Business and functional professionals who are stakeholders on projects working in a PMO environment
 - PMO managers who are managing large numbers of projects who wish to improve the management of their PMO
 - Up and coming project professionals who want to sharpen their skills and knowledge of PMO
- This is an excellent introductory course for those who are considering the Project Management Professional certifications.

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More Course Information

1. Context of PMO

- What is PMO and why is it important?
- Framework for projects, programs, portfolios, and PMOs
- Challenges and opportunities for PMOs

2. PMO Essentials

- PMO lifecycle model
- Building and running PMOs
- PMO Governance
- Evaluating the requirements of PMOs

3. Building, Running, Controlling & Retiring PMOs

- Adaptive alignment
- Essential considerations for building PMOs
- Managing and operating PMOs
- Retiring and transitioning PMOs

4. PMO Capabilities

- Essential capabilities such as status reporting, issue and change management, communication management, earned value
- Advanced capabilities including supply chain management, resource management, strategic alignment, and risk management
- Strategic capabilities such as portfolio management, benefit realization, product management, and knowledge management

Additional Information:

The PMO Essentials Course is part of a comprehensive PMO training curriculum.

Name	Duration	Fee	P D U	Delivery	Description
PMO Introduction	1 Hour	FREE	1	Virtual	Serves as an introduction to PMO
PMO Essentials	¼ Day	\$199	4	Virtual	Designed for a more in-depth look at PMOs (September 2016). Classroom version contains more exercises.
	1 Day	\$699	8	Classroom	
PMO Fundamentals	1.5 Days	\$1,599	12	Virtual	Certification exam included. Focuses on the basic operations of PMO (Winter 2017).
	3 Days	\$2,299	24	Classroom	
Successful PMO for Practitioners	4.5 Days	\$3,699	36	Classroom	Certification exam included. Created for project professionals actively managing PMOs (Nov 2016)
World Class PMO for Experts	5 Days	\$4,299	40	0.5 Day Virtual; 4.5 Days Classroom	Certification exam included. Intense course designed for PMO leaders responsible for establishing or significantly improving their PMO (Spring 2017).

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6. Risk Management Essentials

o Overview:

- The prime directive for project risk management is to minimize unknowns, more commonly called surprises. This is true whether the surprises are positive or negative, known or unknown. In today's large scale, complex projects, risks occur frequently. When managed poorly, risks can sink projects often silently until the threat materializes. The difference between a good and great project manager often lies in his/her ability to exploit positive risks (or opportunities) while minimizing negative risks (or threats).
- Risk management is the discipline of managing known unknowns and unknown unknowns. It is something which everyone wants to be doing but we find that we are unsure how to do so effectively. Risk Management is an essential component of planning and is vital to execution of all projects, programs, and portfolios, whether small or large. So, yes we know it is important, but how do we manage uncertainty? How do we manage risk and still deliver on our projects and organizational goals?
- This course highlights the critical observation that: Risks which have not been managed are the risks we take! If we choose to accept a risk it could be done in conscious awareness, not through lack of action... and it starts with identifying the risks we want to manage!

o Course Description:

- The purpose of this workshop is to provide you with an overview for effective and efficient risk management within your project team. Specifically you will learn:
 - How to manage risk in your organization based on best practices to minimize negativities and maximize benefits
 - A simplified methodology for risk management since this course guides you through the straight forward steps of identifying, assessing and managing risk
- This course will also provide an overview of the PMI Risk Management credential process and hints on preparing for the exam

o Target Audience:

- The target groups for this course are:
 - Project managers and directors who are leading high-risk and high-stakes projects
 - Business and functional professionals who are managing or working on complex projects, especially in a turbulent project environment
 - PMO managers who are managing large numbers of projects who wish to improve the management of project risk
 - Executives in high-risk, high-visibility industries who want to improve their individual and their organization's ability to mitigate negative risks (threats) and exploit positive risks (opportunities)
 - Up and coming project professionals who want to sharpen their skills, capabilities, and credentials in managing project risk
- This is an excellent introductory course for those who are considering the PMI Risk Management Professional (PMI-RMP) certification

o Course Fees, Dates, and Professional Development Credits:

- Fees and PDUs:
 - HALF Day - \$169; 4 PDUs (2 Technical, 1 Leadership, 1 Strategic)
 - ONE Day - \$599; 8 PDUs (4 Technical, 2 Leadership, 2 Strategic)

o Registration:

- To register for this class, contact us at cert@poadvisory.com or register directly at www.poadvisory.com/training/registration/.

More Course Information

1. What is Risk Management?

- An introduction to the field of risk management
- Why manage risk?
- Definition of Risk and Risk Management
- Benefits of Risk Management

2. Risk Management across Portfolios, Programs, and Projects

- The necessity of risk
- Issues versus risk
- Understanding portfolio, program, and project risk
- Black swans

3. Risk Management Process

- Detail the risk management process and its phases
- Plan Risk Management
- Identify Risk
- Qualitative and Quantitative Risk Analysis
- Plan Risk Response
- Monitor and Control Risk

4. Selective Risk Management Tools & Techniques

- Selective samples of important tools and techniques

Additional Information:

The Risk Management Essentials course is designed as an introductory course for project professionals working in environments where uncertainties and change are the new norm.

This course provides valuable information to project professionals who are considering the Risk Management Professional certification (PMI-RMP), but this course is not the boot camp for preparing for the Risk Management Professional certification.

PMO Advisory offers multiple types of boot-camps: PMI-RMP Intelicamp that is delivered virtually and PMI-RMP Classroom course for a more traditional experience. For information on our exam preparation courses, please visit us at www.pmoadvisory.com/pmi-rmp or simply contact us.

Why Consider PMO Advisory? Four simple reasons:

- We are the most comprehensive project management certification firm in the world today.
- For our bootcamps, we are so confident of our methodology that we offer the “[Complete Support Promise](#)” which includes up to 12 months of support and our “Money-Back Guarantee” which is the best in the world.
- Our products and services are highly innovative, creating new and value added products and services such as PMI-RMP certification training, our own Intelicamp®, the largest test bank, & our [Mega Bootcamps](#)
- PMO Advisory is different than most firms because we are driven by our mission and business goals. Our social mission, helping professionals maximize their potential and the philosophy to “be extraordinary” leads us to offer a BIG list of [free stuff](#). We also offer a “[Special Consideration](#)” program for selective groups of professionals and we “waive” up to 60% of our fees.

About PMO Advisory LLC

PMO Advisory is one of the most specialized firms in the world focusing on project management, IT service management, and business management. In addition to offering training for all ITIL certifications, the firm also offers project management training including portfolio (PfMP®), program (PgMP®), project (PMP®, CAPM®, PRINCE2®, and MSP®), risk (PMI-RMP®), project management office (PMO), and agile project (PMI-ACP® and SCRUM) training. Our headquarters is next to Montclair, NJ with training sites in NYC (near Wall Street) and NJ (near Montclair and in Jersey City). The firm services consumers, businesses, government institutions, and universities.

What differentiates PMO Advisory is its depth and service delivery, including one of the best warranties in the marketplace. Its focus is on developing innovative products such as bundling online learning modules, and its mission-driven aspirations as a B-Corp. The firm’s instructors are highly experienced and certified professionals and industry experts. In most cases, they are also college professors, guest speakers or lecturers.



7. Organizational Change Management Essentials

○ Overview:

- The only constant is change. Yet, managing organizational change often happens in hindsight, if it happens at all.
- Organization Change Management (OCM) is a necessity at firms that are under-going strategic change, whether it is through reorganization, M&A, or changes to their core business systems and processes.
- Projects, especially ones that impact people, often fail not because of technological challenges but due to the unpreparedness, the unwillingness, and the inability of people to adopt change. Poorly managing change is likely one of the biggest contributors to the poor state of strategy execution.
- To successfully manage these changes, leaders must be positioned to:
 - Use a consistent, systematic approach to managing diverse change across the organization
 - Effectively applying change tools in a multitude of organizational change settings
 - Assess and manage resistance, fatigue, and change effectiveness to increase success of projects
 - Use techniques and tools to engage, advise and guide change leaders in the organization

○ Course Description:

- This course blends a conceptual overview of Organization Change Management (OCM) with the practical tools for evaluating and managing organizational change. Unlike other workshops, participants in this workshop will receive all the OCM templates in editable format so they can readily utilize them in their work. Selective templates include:
 - Organization Change Management Complexity Assessment
 - Project Charter
 - Stakeholder Identification, Action, and Communication Plan
 - Stakeholder Questionnaire
 - Initiative Prioritization Tool

○ Target Audience:

- The target groups for this course are:
 - Business and technical professionals who are responsible for managing change in their organization
 - Project professionals who are working on transformative projects that impact the organization and its people
 - Executives who are leading organizational change initiatives looking to develop a better understanding of OCM

○ Course Fees, Dates, and Professional Development Credits:

- Fees and PDUs:
 - HALF Day - \$299; 4 PDUs (1 Technical, 2 Leadership, 1 Strategic)
 - ONE Day - \$799; 8 PDUs (2 Technical, 4 Leadership, 2 Strategic)
- Inclusions:
 - All templates in editable formats (Excel, Word, PowerPoint) with the licensing rights for individual usage
 - Organizations seeking an enterprise license should contact us directly

○ Registration:

- To register for this class, contact us at cert@poadvisory.com or register directly at www.poadvisory.com/training/registration/.

More Course Information

1. What is Organization Change Management (OCM)

- Managing change successfully
- Change management keys to success
- OCM productivity
- Kotter's key success factors for change

2. Why is OCM so challenging

- Transition process
- Three phases of individual transition
- Understanding reaction to change
- Resistance will be paid, one way or another
- Commitment curve

3. Organization Change Management Tools

- Organization Change Management Complexity Assessment
- Project Charter
- Stakeholder Identification, Action, & Communication Plan
- Stakeholder Questionnaire
- Initiative Prioritization Tool

Additional Information:

This course is adopted from our consulting practices where we help our clients design and implement organizational change management practices to achieve greater organizational readiness, willingness, and adoption.

The tools and templates provided are “battle tested” as they are based on best practices and proven methodologies. Participants will receive these templates plus some additional ones; we also grant individual licenses to participants to use them in their jobs.

Since this course is based on our consulting practices, there will be regular updates to improve the content, tools, and templates utilized in this course.

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