

BOXERADVISORS
Translating Insights Into Action

PROJECT & PROGRAM MANAGEMENT TRAINING COURSES

Boxer Advisors, LLC
6701 Democracy Blvd., Suite 300
Bethesda, MD 20817
Cell: (240) 355-1192
Website: BoxerAdvisors.com

TABLE OF CONTENTS

1.0	Project And Program Management Courses	3
	Introduction to Project Management	3
	Foundations of Project Management.....	4
	Project Leadership, Management, and Communications	4
	Quality for Project Managers	5
	Project Cost Estimating	6
	Project Planning Analysis and Control.....	8
	Negotiation Skills for Project Managers	9
	Unlocking the Power of Earned Value Management	10
	Project Risk Management	11
	Managing Projects and Priorities	12
2.0	Boxer Advisor's Approach/Methodology to Training.....	13
2.1	Overall Approach to Training.....	13
2.2	Training Methodology	14

1.0 PROJECT AND PROGRAM MANAGEMENT COURSES

Introduction to Project Management

Overview

Project management is the most effective method of delivering products within cost, schedule, and resource constraints. In this 3-day highly interactive workshop, participants learn skills to ensure projects are completed on time and on budget while giving the user the product they expect. Participants gain a strong working knowledge of the basics of project management and are able to use that knowledge to effectively manage work projects. By the end of the course participants are able to identify and manage the product scope, build a work breakdown structure, create a project plan, create the project budget, define, and allocate resources, manage the project development, identify, and manage risks, and understand the project procurement process. Learners will review case studies, build a work breakdown structure, create a project plan, and much more.

Competencies Addressed	
✓	Execution
✓	Decision-Making
✓	Communication
✓	Team Management

Objectives

Upon successful completion of this training, students will be able to:

- Identify and formulate project tasks
- Consistently estimate individual task time and cost within a tolerance of 10%
- Schedule resources for each task
- Compute total project time and cost
- Use Earned Value Management (EVM) to identify project status and project future outcomes.
- Identify project slippage and formulate corrective actions
- Communicate status to management and other stakeholders
- Apply common charting techniques such as TASK, Gantt, personnel loading, and PERT
- Conduct meetings efficiently and achieve results

Additional Details

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program and Project managers,

Team Leads & Other Interested Professionals

Mode of Instruction: On-Site or Virtual



Foundations of Project Management

The Foundations for Project Management is a four-day class designed to enable federal employees who are Project/Team Leads at the GS-11-GS-14 level to build skill strength in the area of project management with the outcome of developing great leaders in the Federal environment. Participants will learn basic to intermediate project management principles, tools, and techniques used to manage projects, as well as an understanding of the critical role of the project manager.

Course Structure:

Course content will address the following competencies: accountability, problem solving, strategic thinking, team building, and technical credibility.

Course Learning Objectives:

Participants will:

- Explore and practice critical concepts and strategies for successfully managing a project
- Understand project management based on the Project Management Institute's Body of Knowledge (PMBOK)
- Learn how to apply critical project management tools to improve project planning and implementation
- Learn and demonstrate effective team behavior and the importance of team membership when it comes to successful projects
- Develop and present a basic project plan incorporating key course concepts

This course includes an interactive, online, role-playing simulation.

Project Leadership, Management, and Communications

Overview

This interactive course is designed to provide a solid foundation in key leadership competencies and gives participants a truly transformational leadership experience. Participants complete a self-assessment of their leadership skills and master the basics of the following leadership competencies: aligning people, motivating, and inspiring, leading teams, communicating, building relationships, facilitating ethical conduct, negotiating, and leading change. Participants create a personal leadership vision and work on strengthening their leadership competencies as they develop their personal Leadership Development Plan. Participants learn to empower themselves and other team members. Participants engage in revealing case studies, open discussion, and practical exercises.

Competencies Addressed	
✓	Team Management & Execution
✓	Technical Competence & Project Leadership
✓	Critical Thinking & Problem-Solving
✓	Communication 7 Decision-making

Objectives

Upon successful completion of this training, students will be able to:

- Lead project teams through more effective communication
- Identify motivational value systems to improve productivity and cooperation

- Recognize the role of business and personal ethics in leadership
- Define predictable change stages and identify appropriate leadership strategies for each stage
- Utilize a powerful four-stage collaborative negotiation process
- Create a Leadership Development Plan to implement when you return to work

Additional Details:

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers
& Interested Others

Mode of Instruction: On-Site or Virtual



Quality for Project Managers

Overview

This course explores the essentials of project quality management and its vital link to business success. This course focuses on the tools and essentials of effective quality management that work for any organization. Participants learn to integrate quality management concepts with project management to support business success. Participants learn about the philosophy and principles of quality management and learn how to translate these concepts into specific actions that are key to successful project quality efforts. Participants practice concepts, and techniques using case studies.

Competencies Addressed	
✓	Program & Project Management Tools
✓	Team Management & Execution
✓	Technical Competence
✓	Critical Thinking & Leadership Acumen

Objectives

Upon successful completion of this training, students will be able to:

- Integrate project quality management into the entire project life cycle
- Use five steps to plan effectively for project quality management
- Use five steps to assess and improve the organization's current quality capabilities to ensure that projects will meet specified quality standards

- Ensure customer satisfaction by monitoring results using project quality control tools
- Apply project quality management tools and techniques to “real world” project management situations

Additional Details

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual



Project Cost Estimating

Overview

One key to project success is accurate and timely project cost estimating. Estimating is a practice that occurs throughout the project management lifecycle. It must be done effectively and efficiently. Participants explore project areas that must be estimated and use tools and methodologies best suited for the estimates they prepare. Participants use challenging exercises and practice using different cost estimating techniques.

Competencies Addressed	
✓	Project WBS Tools & Techniques
✓	Technical Skills & Business Acumen
✓	Critical Thinking & Leadership
✓	Cost Estimating & Evaluation

Objectives

Upon successful completion of this training, students will be able to:

- Define cost estimating, cost estimating terms, and cost estimating concepts such as basis of estimate
- Create and use a solid work breakdown structure (WBS) and resource breakdown structure to estimate cost and work
- Create cost estimates using different estimating techniques

- Apply a formal process to create a cost estimate for any project

Additional Details

Course Length: 2 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual

Project Planning Analysis and Control

Overview

This course reviews project management fundamentals across the entire project life cycle. Participants explore proven strategies and practical tools for planning, executing, and controlling a variety of projects. Participants improve their ability to define the scope of a product development project and manage within that scope. They learn to identify and sequence tasks, estimate durations of tasks, schedule events and activities, plan for delays, manage costs, and utilize resources. Participants explore techniques for identifying, analyzing, and mitigating risk, as well as the best ways and times to apply these techniques to the project environment. Participants put these techniques to work through case studies and group discussion.

Competencies Addressed	
✓	Planning, Scheduling & Estimating Tools & Processes
✓	Team Leadership & Decision-Making
✓	Business Acumen & Technical Competence
✓	Critical Thinking & Project Implementation

Objectives

Upon successful completion of this training, students will be able to:

- Describe the roles and responsibilities of project managers across the project life cycle
- Define and develop the foundations of a project management plan, including project requirements, work breakdown structure, schedule, resources, and other cost estimates
- Describe project risk identification, risk assessment, and risk mitigation strategies
- Control the project by managing against the baseline
- Close out a project effectively



Additional Details

Course Length: 4 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual

Negotiation Skills for Project Managers

Overview

In this interactive course, participants become skillful at dealing with difficult people and situations where there seems to be no compromise. This course teaches how to work toward agreements where all parties are pleased with the outcome. This course will enhance participant's personal and professional life with powerful new negotiation skills. Participants explore typical negotiation situations at key points in the project lifecycle. Participants are presented with negotiation techniques and receive feedback for further development and improvement.

Competencies Addressed	
✓	Communication & Influencing Skills
✓	Negotiation Strategies
✓	Communication & Feedback
✓	Emotional Intelligence & Leadership

Objectives

Upon successful completion of this training, students will be able to:

- Recognize the naturally occurring structure of a negotiation in order to develop an efficient and effective methodology for preparing and conducting a negotiation
- Explore negotiation in the context of project management
- Leverage your negotiating competencies to improve your strengths
- Gain insight into how to better manage yourself, your emotions, and your relationship with the other party
- Better prepare for complex and difficult negotiation situations

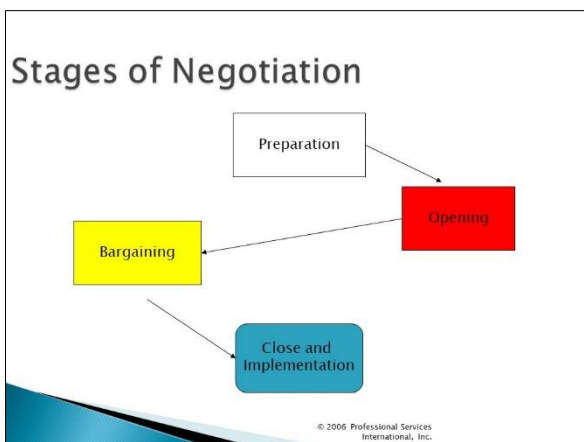
Additional Details

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual



Unlocking the Power of Earned Value Management

Overview

This 3-day course equips participants with the knowledge and skills required to assess the status of your projects in terms of cost, schedule, and scope. Participants learn to objectively measure project performance. This course teaches the common language in communicating project status and helps improve project productivity and performance. This course provides an overview of EVM, the misconceptions of implementing an EVM system, and the fundamental elements necessary to support a successful EVM system. At the end of this training, participants gain knowledge, boost their skills, and become proficient in Earned Value Management.

Competencies Addressed	
✓	Technical Competence & Critical Thinking
✓	Earned Value Management Tools & Techniques
✓	Budget Cost & Time Schedules
✓	Strategic Action Planning & Development

Objectives

Upon successful completion of this training, students will be able to:

- Harness the power of EVM to control your project
- Indicate work progress in a more objective way within and across projects
- Properly relate cost, schedule, and technical accomplishment
- Relate time-phased budgets to specific tasks and/or statements of work to create a useful and realistic baseline
- Supply managers with information at a practical level of summarization
- Prepare an action plan and create an immediate impact to your organization's ability to effectively control projects

Additional Details

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual

Project Risk Management

Overview

Project and Program Management is risky. Something is bound to go wrong. Even successful projects must identify, assess, and mitigate risk. This risk management course explores best practices that are critical to delivering projects that adhere to timeframes, budgets, and quality requirements. Participants learn different approaches to risk management, including how to respond to risk, monitoring and controlling and communicating risks throughout the project lifecycle. Risk is inevitable, but this course teaches participants how to mitigate it and keep projects effective and successful.

Competencies Addressed	
✓	Risk Management Framework Skills & Techniques
✓	Strategy Development * Implementation
✓	Business Acumen & Technical Competence
✓	Team Leadership & Execution

Objectives:

Upon successful completion of this training, students will be able to:

- Apply scalable planning methods to prepare for project risk management
- Prepare a risk management plan to guide your risk approach
- Identify project risks by using different identification tools
- Integrate risk management techniques and results into a balanced project management approach
- Use multiple techniques to identify and document risks
- Perform qualitative risk analysis to prioritize risks for response and monitoring
- Perform quantitative risk analysis to assess risk to the overall project cost and schedule objectives
- Incorporate expected value, probability, and distribution into your risk analysis
- Estimate and characterize the impact and timing of risks on your project
- Determine and implement appropriate risk response strategies based on risk analysis
- Monitor and control identified and emerging risks based on risk plan and project execution results
- Communicate risks effectively to all project stakeholders



Additional Details:

Course Length: 3 Days

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual

Managing Projects and Priorities

Overview

The workplace is overwhelming. Workers are constantly faced with more and more projects and deadlines to meet. This course is designed for today's professionals. Participants identify poor habits that hinder progress and waste time. They learn to replace them with successful habits. Participants learn to establish priorities by setting goals and how to focus their efforts to yield the best results. Participants also gain insight on why many projects fail and are able to avoid common mistakes.

Competencies Addressed	
✓	Organization & Problem-Solving
✓	Team Leadership & Collaboration
✓	Critical Thinking & Problem-Solving
✓	Technical Competence & Project Tools & Techniques

Objectives

Upon successful completion of this training, students will be able to:

- Boost productivity by eliminating time-wasters
- Meet deadlines with ease
- Recognize priorities
- Handle inevitable project changes and obstacles
- Develop success habits to keep on track and on target
- Head off problems and project glitches
- Organize anything in three easy steps
- Banish the project cripples — procrastination and perfectionism
- Minimize the time-draining effects of interruptions
- Use the 80/20 rule to focus efforts where they make the most difference
- Spend less time in meetings with better results



Additional Details:

Course Length: 1 Day

Maximum Number Of Participants: 25

Target Audience: Program & Project Managers & Interested Others

Mode of Instruction: On-Site or Virtual

2.0 BOXER ADVISOR'S APPROACH/METHODOLOGY TO TRAINING

2.1 Overall Approach to Training

Boxer Advisors believes the goal of every training program is to improve the performance of an organization by improving the capabilities of its people. Our instructors are experts in adult-learning methodologies and the key differences in learning styles, which may be generational, technical or behavioral. Each training program is designed using the most up-to-date techniques, including inquiry-based learning, where we focus on building practical and repeatable skills and competencies. Our instructors work hard to:

- Understand learning objectives and methodologies associated with training programs
- Align style and content of training programs with organizational needs and goals
- Apply adult-learning needs, styles and group-process theories during presentations and group activities
- Facilitate critical thinking among participants in training sessions
- Articulate approaches for applying training lessons and skill-development activities in participants' professional environments
- Facilitate effective learning by motivating and challenging training participants while adjusting activities as necessary to address participant needs and reactions
- Handle challenges and resistance from participants in a way that reaffirms benefits and value of session objectives
- Function as a "coach" to participants by enabling them to identify appropriate follow-on activities and opportunities for applying lessons of training
- Conduct effective training evaluation and assessment to determine immediate and longer-term benefits of training to the organization and participants

Practice, involvement, and feedback to produce the greatest return on investment in training. We design our workshops to help each person integrate the skills learned into his or her natural, personal style. Our programs create a developmental learning environment, not a "remedial" one. As a result, participants feel empowered rather than threatened or compromised, leaving them more receptive to growth and change.

In all our courses, the mini-lectures, involvement activities, and demonstrations are all preparatory. The critical learning step is the skill practice that allows a participant to use the behavior being taught. Almost all these practices provide opportunities for participants to practice these skills in relevant situations. Our programs are based on real experiences and combine lectures, skill demonstration, interactive activities, role-plays and instructor feedback.

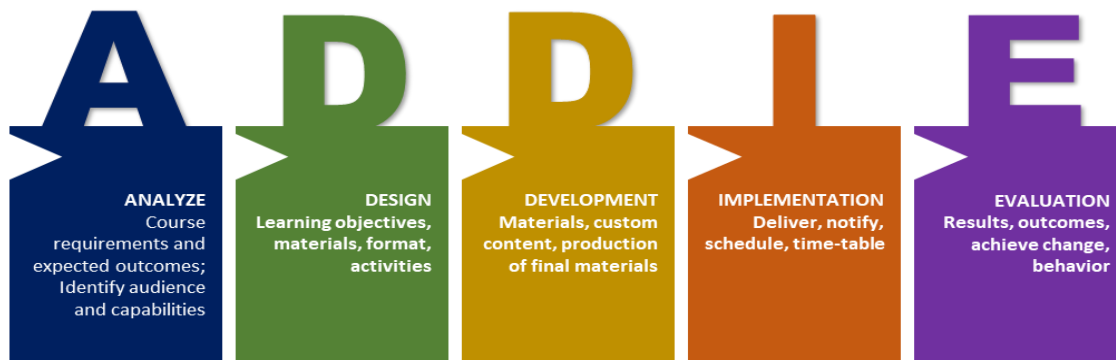
The Boxer Team training topics and commercially available course materials cover a range of professional development and skill-building topics, and we are especially well positioned to deliver the specific workforce development training identified in the solicitation document.

The Boxer Team is committed to understanding the organizational objectives of and ensuring training is adapted to support those objectives. In addition to our off-the-shelf courses, we specialize in taking existing, proven course material and adapting it to meet the specific needs of each client. This means benefits from the past experience of similar programs are included, while still having a customized training experience developed in less time and at a lower total cost.

2.2 Training Methodology

Boxer Advisors provides a fully comprehensive range of training solutions. Our philosophy is to ensure your organization receives the most appropriate training program that meets your needs, be it an off-the-shelf product, a tailored off-the-shelf product, or a customized product developed specifically for you. Our goal is to make it easy for you to address all your workplace training solutions, which are achieved through our unique alliance with each of our partners.

Even though our offerings are considered “off-the-shelf,” the Boxer Team creates each learning experience using a structured five-step design process to ensure the best possible fit with client expectations.



We take special care to first **Analyze** the course requirements and expected outcomes by speaking with project sponsors and participants so we can develop material targeted to client-specific needs.

Next, we **Design** the course work, typically taking existing material and modifying it to meet client-specific needs. This may involve creating hybrid lesson plans, taking the best from more than one source. In this step, we also design the course evaluation materials used at the end of each course. A rigorous design phase ensures there will be no surprises and each training experience meets or exceeds client expectations. Each design phase includes input from the client and final approval of the material by the client.

The next step is to **Develop**/adapt the course materials. This involves the creation of any required custom content and the production of the final course materials. Each deliverable is produced to meet the Boxer Team rigorous internal quality standards as well as client-specific requirements.

We then **Implement** each program according to the agreed upon work plan and schedule. Our workshops and training programs can be tailored to be delivered on-site, off-site, remotely via web and teleconference or a combination of all three. We work closely with clients to determine the best possible location and medium for each program.

Finally, we **Evaluate** the results and outcomes of each program to ensure it has fully met client objectives. Our evaluation process incorporates anecdotal data gathered by the instructors and end-of-day participant feedback. At the end of each course, participants are given written evaluations that capture: (1) reactions to the experience (2) what they take away from the training and (3) how they plan

to use the information at work. Our comprehensive evaluation processes ensure that the training delivered the expected results, identified opportunities for improvement and recommended follow-up actions to reinforce the material learned or address any gaps that may have been identified.

Our courses always have a defined course title, are timed to ensure an expected duration, and include description of the course objectives and the materials to be covered.