Sys·tem·a·tion®

Managing Initiatives

The goal of organizational initiatives is to help an organization get better, but no matter how well intended, many initiatives fail to deliver on their promise. Managing initiatives effectively is a skill, one that involves understanding the functions that need to be performed as well as what it takes to get the work done on time and with the resources you have. All too often employees are put into this role without the training and knowledge to be successful. This workshop equips the point people on initiatives to tame the chaos and reliably deliver on stakeholder expectations. Participants learn how to create clear roadmaps for success as well as time-tested techniques for bringing an off-track initiative back on course. In addition to practicing failsafe methods for eliciting stakeholder needs, they explore no-nonsense approaches to identifying and circumventing potential stakeholder resistance. They leave with a set of tools and techniques to use at each phase—planning, defining, creating, and fulfilling—to move initiatives smoothly through to completion.
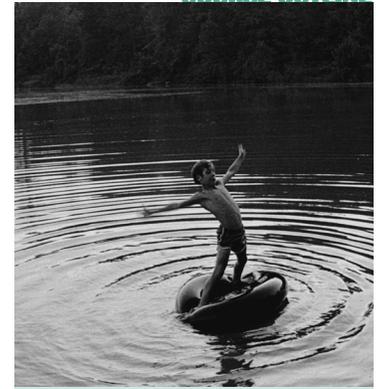
DURATION:
Traditional - 2 days.
Virtual - 16 hours.

CAPACITY: 20 people.

WHO SHOULD
ATTEND: anyone
responsible for completing
an initiative within a
defined period of time.

PREREQUISITES: none.

PDUs: 14 credits.

FEATURES

- Our facilitators bring real-world experience to every workshop.

- Participants will be led, not lectured, through a combination of presentations and hands-on exercises.

- Participants will experience practical and immediately useful techniques that they will be able to incorporate into existing projects to maximize skill transfer.

- Our workshops provide an experiential environment where participants can take risks and make adjustments based on their results so they're prepared to manage initiatives successfully back on the job.

DISCOVER HOW TO

- Create a solid initiative plan.

- Interview stakeholders to create a detailed set of defined characteristics for the desired results.

- Resolve differing stakeholder needs, acquire needed resources, and manage expectations.

- Coordinate current week's activities, monitor progress to identify gaps between what was planned and what actually happened, and adjust the next week's activities to close the gap.

- Plan for and manage the change resistance that accompanies initiatives.

OUTLINE SUMMARY

Initiatives
- What is an initiative?
- The initiative triangle.
- Initiative participant groups.
- Distinct initiative phases.
- Vital initiative disciplines.

Functional Roles Examined
- Project manager.
- Business analyst.
- Subject matter expert.
- Change manager.

The Initiative Plan
- Initiative benefits, objectives, and deliverables.
- Sponsors and stakeholders.
- Required resources.
- Milestone schedule.
- Initiative baseline.

Task Identification
- Work breakdown structure (WBS).
- Format, rules, and conventions.
- Resource assignments.
- Task lists.

Estimating
- Level of accuracy.
- Duration and cost.
- Approaches to estimating.
- Estimating considerations.

Sequencing and Scheduling
- Network diagram.
- Task dependencies.
- Critical path.
- Gantt chart.
- Resource leveling.

Negotiating
- Importance of negotiation in project success.
- Common deficiencies and problems.
- 8 step model.
- Key elements to developing commitment.

Interviewing Stakeholders
- Preparing for the interview.
- Questioning and listening techniques.
- Holding the interview.
- Listening for needs.

Defining the Need
- Identifying needs.
- Writing requirements.
- Organizing requirements.

Initiative Dynamics
- Weekly initiative meeting.
- Issue tracking.
- Initiative sway.
- Status reporting.
- Steering the initiative back on course.

Creating the End Deliverable
- Design.
- Development.
- Verification.

Change Resistance and Acceptance
- Changes created by projects.
- Stages of change.
- Resistance.
- Change strategies.
- Plan the change.

Implementing the Product
- Product adoption.
- Project closure.

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Get to the Heart of the Matter.®