BUILDING A PROJECT MANAGEMENT CULTURE

COURSE OVERVIEW

Everyone at some point ends up doing projects, but that doesn't mean that they do them well. Enter in the *Building a Project Management Culture* course—it's project management for the non-project manager, targeted to your specific organization.

Oftentimes, there are large variances in software competencies within a team. Get everyone on the same page and learn how to use Microsoft Teams, Planner, Lists, To-Dos, and Office as a whole to gain greater efficiency in managing projects and work.

We've developed a four-workshop course to deliver structured training in project management methodology and Microsoft 365. After completing the series of two-hour trainings, your team will be able to:

- Intake projects/work thoughtfully
- Plan and manage project timelines
- Schedule & conduct virtual meetings
- Organize tasks and documents

WHO SHOULD ATTEND

This course is intended for teams with little to no project management experience.
This course leans toward those *doing* the work, not necessarily *leading* the work. A class size of fifteen is considered ideal.

COURSE MATERIALS

This course is delivered via a series of demonstrations with interactive exercises. Electronic tools accompany key areas of training. This program can be delivered in-person or virtually.

As a best practice, we recommend adding a process mapping session on to this course. Before diving into training, we work with you to map current project/work intake, delivery, and communications processes. This allows our instructors to more precisely tailor the training to you.

LEARNING OBJECTIVES

- Understand the value of establishing a process to repeat success
- Maximize MS Teams to increase your productivity
- Bring all your tools into one view in MS Teams
- Eliminate duplicate files, coauthor documents simultaneously
- Leverage O365 Planner to easily manage tasks, resource assignment and documentation all with drag & drop interface
- Manage project issues, risks & communications using O365
- Centralize all information (files, e-mails) in MS Teams
- Create a project retrospective survey in Teams or MS Forms
- Help your team learn & improve by doing retrospectives & surveys with MS Forms
- Use views to close out work, archive documents & group and filter documentation

COURSE OUTLINE

⤓ Workshop One: Take It All In
- Learn the steps and activities in standardized process work flow
- Use Teams & SharePoint to organize projects/work, clients, resources, etc.
- Use Outlook & Planner to support and simplify project processes

⛓ Workshop Two: Focus on Work and Resources
- Plan how the work will get done and who will help you deliver it
- Easily review team assignments, workload, and deadlines
- Use Planner, Teams, and SharePoint for task/work management
- Manage risks and issues and ensure important actions aren't missed

📋 Workshop Three: Make it Happen and Report Progress
- Progress tasks and activities in O365 Planner
- Share links, not files, to create one documented version of the truth
- Use SharePoint and learn tips in Power BI for reporting
- Manage risks and issues using O365

⚓ Workshop Four: Wrap It Up and Close Out Work
- Close out contracts, procurements, user acceptance testing, etc.
- Obtaining sign-offs and submitting invoicing, as appropriate
- Prepare project closure reports and archive documentation
- Use MS Teams/Forms to create project retrospective surveys

INSTRUCTORS & ACCREDITATION

This course will be taught by an experienced instructor, well-versed in the field of project management and Microsoft 365. Attendees will walk away from the class with the skills they need to navigate project work and establish important organizational processes moving forward.

Advisicon's goal is to improve your processes and technologies, thus creating measurable results. For over 30 years, we have successfully helped customers learn, scale, and grow.

PAIN POINTS
THIS COURSE HELPS!

WE HAVE M365, BUT DON'T KNOW WHICH TECH TO USE FOR WHAT.

Everyone has their own comfort level with specific softwares. Get the team on the same page with their capabilities and ensure you use the right app for the job.
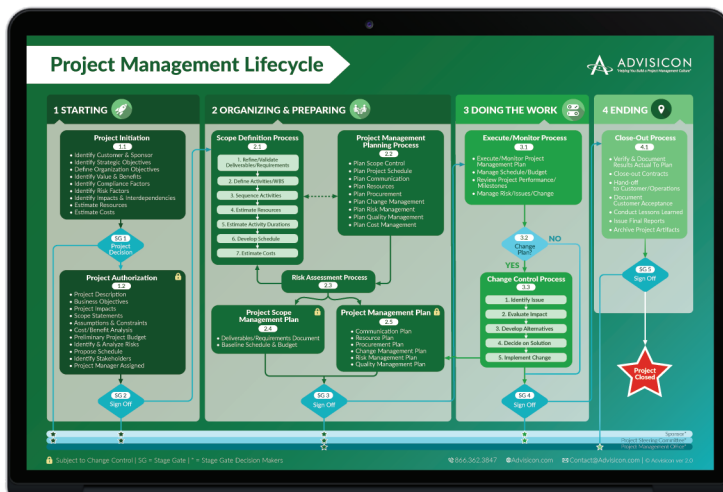
OUR PROJECTS ARE A MESS!

Microsoft offers an array of lightweight solutions to organize & manage tasks while leveraging SharePoint to store docs.

WE CAN'T FIND THE FILES WE NEED.

Learn the difference between OneDrive, Teams, and SharePoint to store files. Sync up the team & create storage conventions.

WE CAN'T ESCAPE OUR INBOXES.

This course teaches best practices to shift task management, documents, and key communications to more appropriate locations, reducing the siloed feeling of work & letting your team get more done.

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