

Introduction

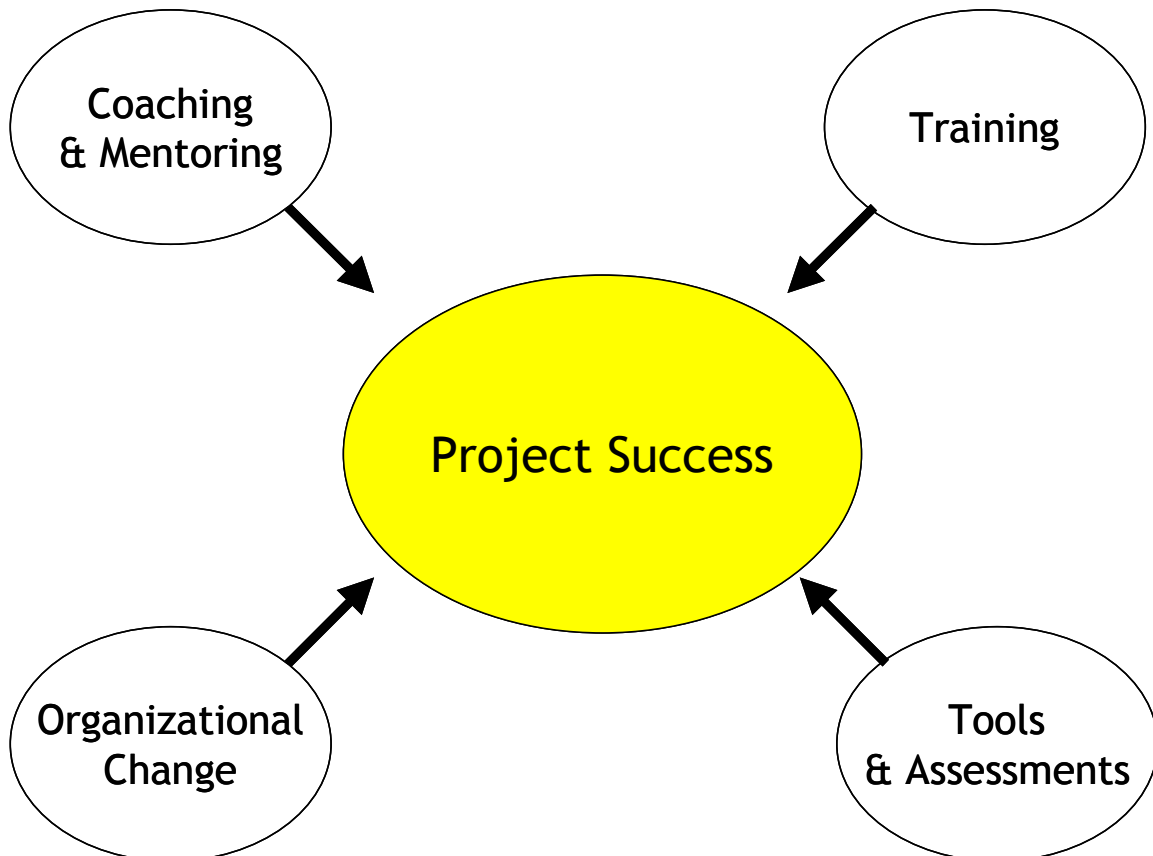
Synergest does not provide a one-size-fits-all solution to our clients. Each organization has its own unique needs and goals. For this reason, Synergest associates always work with the organization to determine what would be right for that situation.

Synergest provides consulting, coaching, mentoring, training, as well as related support tools. We draw upon our experience and expertise to provide clients with better choices for the appropriate solution.

This document spells out an example process of how Synergest might work with your organization. This is just a sample of some of the many approaches we can use. We hope that this example will prompt discussion about how your situation might be approached.

- ✘ [Our Consulting Approach](#)
- ✘ [Our Training and Performance Support Approach](#)
- ✘ [Project Management Framework](#)
- ✘ [FAQ - Frequently Asked Questions](#)

Synergest provides high quality - *low risk* - high value - *very reasonably priced* consulting, training and support tools.



Our Consulting Approach – One Example

Synerggest consultants are experienced professionals with at least thirteen years of hands-on experience. Several of our consultants are published authors who (literally) wrote the book on their area of expertise. Synerggest only employs consultants that have superior interpersonal skills. This enables Synerggest consultants to apply their knowledge in effective and non-threatening ways.

1. **Initial contact** - The client and Synerggest make contact, to find out how they might work together. This initial contact is usually over the phone.
2. **Background check** - Synerggest performs a cursory background check on the potential client, by visiting the client's website as well as using other business resources. This is to better understand who the organization is, what the organization does, what their market is, who their competition is, and what issues they might be facing.
3. **First date** - This is usually face-to-face, and usually at the organization's location. This is when the organization explains their needs, what they see as their problem or issue, and how they hope Synerggest can assist them. Most of the time, this meeting involves a tour of the facility, the meeting of several people throughout the organization, and a brief on-site review of any related documentation the organization might have in place.
4. **Proposal for pain ⇒ gain** - Synerggest then draws up a proposal for how Synerggest can turn the organization's pain into a gain for the organization. This is when Synerggest recommends courses of action. The action could take the form of consulting, mentoring, coaching, training, or even the purchase or implementation of software. Most often, the solution involves more than one form of action. Synerggest always proposes the most appropriate resources based on industry experience, realm of expertise, and the expected "fit" between the client organization and the proposed consultants.
5. **Implementation** - Synerggest uses the proposed consultants in the manner proposed. The consultants maintain flexibility to adapt to the situation as needed, and communication openly with the client.
6. **Mid-project review** - Synerggest practices what it preaches. A mid-project review, in addition to regular checkpoints and updates, allows Synerggest to make the appropriate adjustments to the consulting engagement in order to maximize the effectiveness of the solution.
7. **Project close-out** - At the end of the consulting engagement, Synerggest meets face-to-face to discuss next steps. At this point, Synerggest also hands over documented Lessons Learned to the client. These Lessons Learned help the organization benefit even more from future consulting engagements.

✘ NOTE: Synerggest has a consulting philosophy of helping organizations bring expertise and best practices into the organization. The goal is to get the organization to the point where Synerggest is only needed in special cases, or to provide a "booster shot" of the proper application of management techniques. Synerggest does not create situations where they are in the client's organization for year after year, keeping the secrets of best practices to themselves.

Our Training and Performance Support Approach – One Example

To maximize a client's training efforts, Synergest recommends the following process. This sample process is listed here to help you get more familiar with what elements and steps are necessary to ensure optimal skills transfer.

1. **Initial contact** - The client and Synergest make contact, to find out how they might work together. This initial contact is usually over the phone.
2. **Background check** - Synergest performs a cursory background check on the potential client, by visiting the client's website as well as using other business resources. This is to better understand who the organization is, what the organization does, what their market is, who their competition is, and what issues they might be facing.
3. **First date** - This is usually face-to-face, and usually at the organization's location. This is when the organization explains their needs, what they see as their problem or issue, and how they hope Synergest can assist them. Most of the time, this meeting involves a tour of the facility, the meeting of several people throughout the organization, and a brief on-site review of any related documentation the organization might have in place.
4. **Client explains their training vision** - Usually at the "first date" the client explains the vision they have for the training. A lot of times, this is a premature leap to a solution, before the problem has been determined. However, Synergest is more than willing to do as the client requests, should the client wish to move directly into the classroom for a training session.
5. **Synergest investigates the need** - Usually at the "first date" however sometimes at a follow-on meeting, Synergest asks targeted questions about the training need. The goal is to find out the business objectives driving this training need, and match the training provided to the business objectives.
6. **Synergest assesses the participants** - Synergest has several assessments at its disposal to assess the participants' existing knowledge and skill sets. We have a 360-degree university-validated assessment that uncovers need for skills development in project managers. This assessment is like a "Myers-Brigg" for project managers. We also have written exams and quizzes that test content knowledge. We can also conduct quick and informal interviews with each of the training participants, to verbally probe for opportunities for improvement.
7. **Training plan** - Synergest then creates a training plan for the organization. This plan can include just one, or possibly multiple, workshops. The plan also includes the roll-out process throughout the organization. Of course the client should provide feedback on this training plan, to take into account internal issues such as budgeting, politics, or other agendas.
8. **Communication and expectations** - Synergest has several documents that the client can use to better prepare participants for their training. These pre-workshop documents help explain what the training is for, and what expectations the organization has for the participants after they attend the training. These documents also help set the participants' own expectations, by requesting each participant to bring five learning objectives to the workshop.
9. **During the workshop** - Synergest workshops are lively and experiential. This means the learning experience is active - not passive. Participants are called "participants" because they are required to directly participate in their own learning experience. Synergest facilitating consultants are all formally trained on adult learning techniques, and fine-tune the learning experience as needed.

10. **Finishing the workshop** - At the end of each Synerggest workshop, the consultant leads a formal wrap-up and debrief for that particular workshop. This usually involves one last experiential activity, to drive home or solidify the learning that took place. Participants are required to list “next steps” for themselves, to encourage the use of these skills back in the workplace. Each workshop also has a Level 1 and Level 2 assessment, which can be used at the end of the workshop.
11. **Post workshop meeting** - Immediately after the training, the organization should hold its own debrief with the participants, to discuss what was learned and how it can be applied. This seemingly simple activity helps reinforce the importance the organization feels for the training. This also helps remind the participants in yet another way that they should look for ways to practice the skills and techniques discussed in the workshop.
12. **Track skills transfer** - Whether through the use of Synerggest’s Quasi-Level 3 assessment, or through an informal contest of some sort, the organization should actively track the use of the skills and techniques promoted in the training. People should receive some type of feedback, so they can be sure to be applying the skills appropriately. Synerggest consultants are available to conduct this follow-up tracking, or an organization can have an individual’s manager provide the coaching. If the individual’s manager is to provide the coaching, it is best that he or she has also gone through the training, so they know what to ask about and what to expect.
13. **Keep the concepts fresh** - The organization should hold occasional lunch meetings to promote discussion about the training that took place. These peer-to-peer discussions are powerful events that can win over those hesitant to change their behavior. Monthly e-mails reminding participants about a “skill of the month” is also a good motivator. Every Synerggest workshop has a password protected participant-only website, to help keep the ideas fresh and encourage their use.
14. **Encourage further development** - The organization should consider a formal development path for each individual, and reward continued development. Even if the organization does not directly provide the training, by posting information about other development opportunities, the organization can emphasize the seriousness of the training efforts.

✘ NOTE: Mentoring & Coaching - Synerggest consultants can continue the learning experience for participants by providing mentoring at various degrees of involvement or seriousness. Mentoring can take the form of a monthly face-to-face meeting, or just an occasional telephone call to check on progress. Advances in electronic communication make it easy for Internet or e-mail-based interaction. Synerggest consultants have many methods by which they can successfully encourage maximum skills transfer.

Project Management Framework – One Example

Synerggest is a Global Registered Educational Provider (R.E.P.) with the Project Management Institute. All of our workshops and materials are PMBOK® compliant. This means we abide by and promote the best practices of the Body of Knowledge of the Project Management Institute.



Synerggest is also a member of several other professional organizations, such as the American Society for Quality, American Society of Training and Development, and the Society for Human Resource Management. Wherever appropriate, Synerggest applies the best practices of these organizations. Several of the Synerggest workshops incorporate best practices for project management from the Software Engineering Institute.

※ NOTE: Synerggest adapts its methods to best suit the client's situation. We build off of existing organizational best practices. This saves time, effort, and money, while encouraging buy-in from the organization's people.

Initiation

- Concept development
- Business need and ROI
- Proposal development
- Project approval

Planning

- Scope development
- Project plan development
- Quality planning
- Risk assessment
- Staff planning and acquisition
- Team development
- Procurement planning

Execution

- Complete tasks & deliverables
- Handle scope change requests
- Risk monitoring
- Team development
- Manage procurement

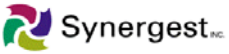
Control

- Monitor performance
- Take corrective action
- Team development
- Risk control
- Quality control

Close-out

- Complete all tasks
- Conduct lessons learned
- Complete contracts
- Turn over deliverables

Project Management Institute's PMBOK® Guide Five Phases with Project Plan Elements					
	Initiating	Planning	Executing	Controlling	Closing
Team Development	organizational planning	staff acquisition, team development	team development	team development	closeout
Risk Management	risk management planning	identification, analysis, responses	monitor, control, identify, analysis, responses	monitor, control, identify, analysis, responses	closeout
Change Control	plan change control	plan change control	change control	change control	closeout
Procurement	determine real need	procurement plan, solicitation plan, solicitation, source selection	contract administration	contract administration	closeout
Quality	assess stakeholders	quality plan creation	quality assurance	quality assurance, quality control	quality control
Project Schedule	mission, issues, initiatives, goal, scope, software settings,	tasks, outline/wbs, durations, dependencies, resources define-assign- refine	using schedule, reports	updating schedule, reports	closeout
Clarify					
Communicate					
Stakeholder management					

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The above job aid is given to workshop participants to encourage consideration of the Project Management Institute's 9 Knowledge Areas and 5 Phases. This support tool helps people remember to apply the necessary project management techniques at the appropriate phase in the project.

Most Synergest workshops address all 9 Knowledge areas of the Project Management Institute's Guide to the Body of Knowledge (PMBOK®):

Integration	Scope	Time
Cost	Quality	Human Resources
Communications	Risk	Procurement

FAQ – Frequently Asked Questions

What if the client already has a methodology?

Synerggest is not in the business of replacing an organization’s methodology. Synerggest looks at what is already in place, what seems to be working well, and what might be improved by the application of a generally accepted best practice.

What methodology does Synerggest use?

Assuming the formal definition of “methodology,” Synerggest does not use a particular methodology. Synerggest uses and promotes best practices, which are the building blocks of any formal methodology. Synerggest has significant experience working with organizations that have implemented formal methodologies, such as Method 1.

Can these efforts be customized?

Absolutely. This document does not contain the firm-fixed method or process that Synerggest uses in every situation. The purpose of this document is to help you better understand what else needs to happen to ensure a successful consulting or training engagement.

How can training workshops be customized?

Synerggest offers three levels of customization. “Stand up” customization is when the facilitating consultant verbally modifies the presentation to include organization-specific issues or needs. This level of customization is the cheapest. “Inclusion” customization is when additional training materials are added to the workshop, to tailor the workshop more precisely to the specifics of the organization. This level of customization is more expensive. “Custom development” is when Synerggest builds a workshop from scratch for an organization. This option is the most expensive.