

# Mandate : FPE

## Owner

Center for Strategic Facilitation, Marieann

## Manager

MikeKat

## Background

### Purpose

Doing it to share the ICA methods with for effective PM. To attract a new market. (eg. people in project mgmt) To broaden our training offerings.

### Scope

Incl: .xls templates, paper templates... Easy resources. Final versions of powerpoints and participant materials.

Obtain names from as many databases as possible. eg. NW database, ICA database, and others ...

Engage Betsy in conversation about resources to support this course.

Define financial model

< see MSP for further definition about deliverables >

### Areas of work not included

Excl. the "ICA proposal"; No further formalization of the GDPM

### Goal

Successful launch for CSF partners

Contribution to ICA strategic objectives (eg. expanding the repertoire of ICA course offerings)

### Constraints and guidelines

MK has very little time to do squat except show up and be co-trainer w/ GH and Marieann.

CSF is the primary source of mktg and financial resources.

### Success criteria

Achieve an 8.0 on a 10.0 evaluation rating (CSF's evaluation form)

12-15 people

Printed on : Jun 30, 2006 7:03:31 AM

Demo : 1 / 2

# Milestoneplan

<b>M:</b> Marketing <b>C:</b> Content development <b>R:</b> Logistics & resources <b>E:</b> Program for Project Excellence					<b>Project nmbr.</b> <b>Project</b> FPE <b>Project code</b> <b>Project manager</b> MikeKat <b>Milestoneplan name</b> FPE.SFO Oct.23-25 <b>Responsible</b> MikeKat <b>Approved by</b>	
Planned	M	C	R	E	Code	Milestone
6/30/06				(E1)		MK: Put Twiki friendly format of Project Plan notes
6/26/06				(E2)		< Charter >
7/5/06	(M1)					Flyer enhancement for SFO created
7/15/06	(M2)					Sales contacts from databases are recvd by CSF
7/15/06	(M3)					Promotion started
7/31/06	(M4)					Advertising in PMI
7/31/06		(C1)				Twiki tool for collaborative development up and running
7/31/06	(M5)					ToP Flyer rights, modification, re-publication
7/31/06	(M6)					Message by CSF to ToP Trainer's network: about excitement and
7/31/06	(M7)					PMI advertising researched (eg. PMI)
8/22/06			(R1)			** Betsy meet's w/Team prior to the PSP class in SEA
8/31/06			(R2)			Financial model agreed by stakeholders
8/31/06			(R3)			Location, Venue, ... decided
8/31/06			(R4)			Software to trainers
9/30/06	(M8)					Paper and .xls tools are created
9/30/06		(C2)				Participant manual is completed
9/30/06			(R5)			Book order by MikeKat
10/25/06				(E3)		Course delivered with a min. of 8.0 satisfaction rating
10/31/06				(E4)		2007 Schedule provided to Joan
12/31/06				(E5)		Trainer & Coach Qualification
12/31/06				(E6)		Long term ICA PE Program (initiative) planning

## Notes

Milestone Message by CSF to ToP Trainer's network: about excitement and

Printed on : Jun 30, 2006 7:09:51 AM

Demo : 1 / 3

Benefits message: Essential

Easily accessible PM: Doesn't have to use the tech, can use the forms w/ losing familiarity

Increased Effectivity for the ToP trainer's themselves (use it for their own project's. (eg. multi-project mgmt)

Provide enhanced services to clients.

Effective w/ the implementation phase of PSP

Extended contracts that would take clients thru implementation

Toolkit gives everybody (not just ToP trainers) particularly PM to address all the needs for planning and implementation for success

ToP trainers "effectivity"

Client's effectivity

Potential new market (breaking into new areas)

Expanding our own understanding of the ToP ;methods (using ToP methods with projecvt mgmt methods)

Milestone    \*\* Betsy meet's w/Team prior to the PSP class in SEA

---

Invitation to Betsy to attend FPE.

Ask Betsy to recommend staff to attend

Benefits doc (essential)

Addtl resources/support obtained from ICA.HQ

Draft schedule of FPE courses for 2007 agreed w/Betsy (Sept deadline)

Deliverables:

Prototype of Trainer/Participant materials

Presentation of FPE to Betsy and Dick Wilkinson (including branding progress)

Culture shift

Financials (\$1495 pricing, w/early bird discount)

Milestone    Trainer & Coach Qualification

---

- GFM qualified

- Use the methods (practitioner)

- Participant

- Co-training

FPE

<qualified ToP model >

-

- Competency in sfwr tool(s) for computer/sfwr based version

- Support facilitator (under coaches guidance)

- Commitment to course development

- Commitment to sales training

Printed on : Jun 30, 2006 7:09:51 AM

Demo : 2 / 3

# Responsibility Chart

## PLAN

## RESPONSIBILITIES

<div>Project nmbr. ProjectFPE Project code Project managerMikeKat Milestoneplan nameFPE.SFO Oct.23-25 ResponsibleMikeKat Approved by</div>											Sr. Mgmt	FPE Core Team	Cheryl	MikeKat	Marieann	Gordon	Catherine	Center for Strategic Facilitation
<div>X - executes the workT - provides tuition on the job D - takes decision solelyC - must be consulted d - takes decision jointlyI - must be informed P - manages progressA - available to advise</div>																		
<div>Months EstimateJun 1, 2006 - Nov 30, 2006</div>																		
Hours	6	7	8	9	10	11	No.	Milestone	1	2	3	4	5	6	7	8		
							E1	MK: Put Twiki friendly format of Project Plan notes				XP		C				
							E2	< Charter >										
3.3							M1	Flyer enhancement for SFO created		I			XD					
							M2	Sales contacts from databases are recvd by CSF						X	P	I		
							M3	Promotion started	X	X			DP			X		
							M4	Advertising in PMI				XP	X					
							C1	Twiki tool for collaborative development up and running						P				
							M5	ToP Flyer rights, modification, re-publication						P				
							M6	Message by CSF to ToP Trainer's network: about excitement and								XP		
							M7	PMI advertising researched (eg. PMI)				XP						
			H				R1	** Betsy meet's w/Team prior to the PSP class in SEA		X				P				
							R2	Financial model agreed by stakeholders		d		X	C	X	C	d		
							R3	Location, Venue, ... decided					P					
							R4	Software to trainers				P						
							M8	Paper and .xls tools are created				X	XP					
							C2	Participant manual is completed		I	X	XD	X	P				
							R5	Book order by MikeKat				C	P					
							E3	Course delivered with a min. of 8.0 satisfaction rating				XP	X	X	X			
							E4	2007 Schedule provided to Joan		C				XP				
							E5	Trainer & Coach Qualification						P				
							E6	Long term ICA PE Program (initiative) planning				P		X				
3.3																		

## Notes

Milestone Sales contacts from databases are recvd by CSF

Gordon

Tim

Milestone Financial model agreed by stakeholders

Printed on : Jun 30, 2006 7:10:32 AM

Demo : 1 / 2

# Activity schedule

## PLAN

## RESPONSIBILITIES

Project nmbr. Project FPE Project code Project manager MikeKat Milestoneplan name FPE.SFO Oct.23-25 Responsible MikeKat Approved by														MikeKat	Gharper	Mshovlin	Catherine	Ckartes						
Estimate	Weeks May 29, 2006 - Aug 27, 2006																		X - executes the work    T - provides tuition on the job D - takes decision solely    C - must be consulted d - takes decision jointly    I - must be informed P - manages progress    A - available to advise					
	Hours	22	23	24	25	26	27	28	29	30	31	32	33						34	No.	Activity	1	2	3
														R1	** Betsy meet's w/Team prior to the PSP class in SEA									
														R1-001	Invitation to Betsy & staff to atten FPE		P							
														R1-002	Benefits of FPE message incl RA/EA		P							
														R1-003	Draft schedule of FPE courses for 2007		P							
														R1-004	Prototype of course materials		P							
														R1-005	FPE branding progress		P							
														R1-006	Help Wanted: resources/support from ICA.HQ		P							
														R1-007	FPE presentation to Betsy & Dick		P							
														R1-008	Discussion of culture impact on FPE success		P							
														R1-009	Financial model presentation		P							
														R1-010										
0.0																								

## Notes

### Milestone

Invitation to Betsy  
to attend FPE.

Benefits doc  
(essential)  
Addtl  
resources/support  
obtained from

Deliverables:

Prototype of

Presentation of  
FPE to Betsy and  
Culture shift

Financials (\$1495