



Leadership Institute
Region Meeting

2018 R7 Region Meeting

PMI-OC Advanced Topics Seminars (ATS)

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Agenda

Intro/History

How

Values & Benefits

Next Steps & Lessons Learned

What

Q&A

Intro/History

- Provided EVERY month for the last 14 years at PMI-OC
- 1st Saturday of each month
- 4-hr sessions
- Interactive, NOT didactic
- Aligns with PMI Talent Triangle

How

- Interactive sessions
- Attendees/participants gain usable information for their jobs
- Providing interactive information and practice on a topic related to PM that attendees/participants can use in their jobs
- 4 PDUs
- Networking opportunity!

Values & Benefits

- Provides 4 PDUs while providing practice time and usable information
- Is interactive (no death-by-PowerPoint) with individual and group exercises and Q&A throughout the presentation
- Provides income for the chapter at low cost to the (refreshments and honorarium are kept at \$50 or less by providing a continental breakfast type of refreshments and a small gift card for the presenter)

Nest Steps & Lessons Learned

- Continuously improving the ATS events
 - Example: Feb-2018 event brought a sudden upsurge in enrollment with 65 attending a room meant for ~40: How to accommodate a large crowd?
 - Solution provided by attendees: Rearrange room tables to accommodate. Mission successful.
- Changing from printed slide decks for attendees to blank paper during the presentation and digital slide deck provided to attendees after the presentation
- Batch uploading of PDUs for attendee list as an additional service

Steps to Putting on an ATS: Before Event

- Find presenter(s)
- Obtain location and work with site providers to ensure facility readiness: computer feed, projector operation, heating & cooling of the meeting room, adequate tables, etc.
- Have the Board and legal review the site provider's contract
- Ensure presenter knows to make the presentation interactive with Q&A, group exercises and individual exercises throughout (No death-by-PowerPoint presenters)
- Assist presenter in creating the presentation and exercises, as needed

Steps to Putting on an ATS: Before Event

- Obtain presenters completed commitment form and upload to Prolific
- Make PDU slips
- Have banner created for web pages and e-blasts
- Create event on PMI National site and have the information added to the chapter web site home, calendar, and detail pages
- Copy materials needed during presentation except for slides, which are provided digitally after the presentation
- Find replacement speakers as needed
- Purchase the refreshments

Steps to Putting on an ATS: During Event

- Handle the registration/check-in (walk-ins, PDU slips, name tags)
- Set up the refreshments
- Set up the A/V equipment
- Make announcements at the ATS (restroom locations, refreshment locations, etc.)
- Introduce speaker and initiate dialogue with participants
- Mention topics for future ATSs

Steps to Putting on an ATS: During Event

- Answer questions from attendees
- Monitor time (breaks) and presentation (interaction)
- Thank the speaker at the end
- Present gift and thank you card to presenter
- Provide survey

Steps to Putting on an ATS: After Event

- Share performance/results at PMI-OC management meetings
- Maintain ATS history file
- Maintain rolling ATS schedule
- Send digital slide deck form presentation to attendees with any notes taken and additional resource information
- Send on-line survey to attendees
- Review survey results after one week and report results to the presenter
- Complete and submit expense report
- Complete status report (money collected, opinions of presentation during presentation, etc.)

ATS Event Time Usage Suggestions

- 5-10 minutes intro btw class and presenter and what they expect to learn.
- 5-10 minutes presenter intro to topic and the three learning points.
- 30-45 minutes slide lecture of main learning point 1.
- 10-minute group or individual work exercise(s).
- 10-15 minutes of going over the groups' solutions to the exercise.
- Repeat above steps for main learning points 2 and 3.
- Summarize learning points.
- Two to three 10-minute breaks throughout.

Questions?

THANK YOU!