

The Recipe for Successful Project Delivery



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NK Shrivastava, PMP, RMP, ACP, CSP, SPC4
CEO/Consultant/Enterprise Agile Coach - RefineM

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Agenda

1. Introductions and Expectations
2. The Recipe for Successful Project Delivery
 - a. Introduction to the Recipe
 - b. What are the most essential PM processes?
 - c. More about the essential PM processes
 - d. Conclusion
3. Upcoming Learning Opportunities from RefineM
4. How to get 1 PDU for this Webinar?
5. Final Q & A

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RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management / Agile topics.



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Your Expectations

What are your expectations from this webinar?

Why are you here today?



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Helping organizations turn their
project management capability
into a *competitive advantage*



CEO/Consultant since Dec 2011

- * Agile Transformation/Coaching/Adoption
 - ✓ Enterprise Agile Coach @ IBM
 - ✓ PMI-ACP One-on-One Coaching
- * Project Management/ Process Improvement Consulting and Training
- * Products for Project Professionals
 - ✓ Essential Gear for Project Managers
 - ✓ PMP Exam Simulator
 - ✓ Online self-paced training videos on Agile Fundamentals, PMP Exam Prep and PDU bundle

My professional journey b/f RefineM

20+ years of Successful Project Leadership

- * Led 100s of projects of all sizes, successfully
- * Recovered many projects, saved millions of \$
- * Implemented numerous process improvements
- * Coached/mentored 100s of PMs, and executives
- * Board Member – SWMO PMI Chapter (2008-2014)

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What's New at RefineM



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What's New at RefineM

Webinar Title	Date
Agile Maturity	Dec 5
Backlog/Story Grooming (<i>ProjectManagement.com</i>)	Jan 9

- * New Training and Outreach
 - ✓ Several in-person and virtual PMP classes in 2018
 - ✓ New BA classes – Business Analysis Fundamentals and Business Requirements Gathering for Agile Projects
 - ✓ New Agile class – Kanban Fundamentals / Kanban 101
- * PMP Exam Prep Test Simulator - <https://Examprep.RefineM.com>
2-day free trial available now.
- * [Agile](#) and [Business Requirements Gathering](#) Videos at Vimeo



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The Recipe for Successful Project Delivery



- Introduction to the Recipe
- What are the most essential PM processes?
- More about the essential PM processes
- Conclusion



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Why use recipe when cooking?

- * Recipes include just the right amount of ingredients
 - ✓ No more, no less
- * Recipes are consistent
 - ✓ Follow the recipe the right way and you get the same result or close
- * Anyone can pick up the recipe and start using it
 - ✓ May not be right the first time but will get it with practice

What is the recipe for successful project delivery?



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Today's Project Environment

- * Not enough to just deliver projects successfully
- * They need to be delivered:
 - ✓ Faster, to achieve time to market and profitability
 - ✓ Using fewer resources, to save overhead
 - ✓ With a more limited budget, due to competing priorities

Finding the right balance of processes is critical



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The “Sweet Spot”

- * Too many processes? Wasting time
- * Too few processes? Introducing too many risks

So, where is the sweet spot?

The Recipe Approach

- * 30 years of experience in project management
 - ✓ When these processes used, projects succeeded
 - ✓ Review of failing projects: one or more processes missing
- * Contribution of Lean principles
- * Applying and getting results from the recipe

The Recipe – Essential Gear for Project Managers

A package of 8 critical project management processes

delivered via intuitive templates and a handbook that describes how to execute best practices and avoid pitfalls.

Everything boils down to just 8 Critical Processes

As against 49 processes of PMBOK 6th edition



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The Eight Processes

1. Project Charter
2. Stakeholder Analysis
3. Work Breakdown Structure
4. Resource Allocation
5. Project Schedule
6. Communication Plan
7. Risk Register
8. Performance Reporting



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The Fitness Test

Project/Program:	#s
Size (S, M, L)	M
Number of Projects	2-6
Number of Team Members	4-8
Duration (months)	4-12

Overall size: 16-18 team members or 200 person months per year



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1. Project Charter

2.0 BUSINESS CASE/OUTCOME

The exiting websites of various departments are integrated and the overall maintenance individually has increased significantly. The university is going to integrating all the services on campus on one portal to make the communication more transparent and effective that would reduce the overall maintenance cost. After the completion of this website all the departments will be under one banner

3.0 PROJECT GOALS

Goal 1: The IT team will be in-charge of creating the framework by the end of march that would be useful for developing all the modules

Goal 2: complete 2 modules by may 24th for review and approval by the client

Goal 3: There is need for 2 Project Managers to be allocated to this project before Jan 5th 2013

4.0 PROJECT SCOPE

The website should have following functionality/feature

- A comprehensive, interactive, effective and esthetically pleasing Internet presence for the Meyer Which reflects the qualities and strengths of the Meyer and the university via a positive, professional presentation;
- Supports collaboration within and outside the Meyer, as well as building the Meyer community;
- Supports MEYER communications and endeavors to integrate existing printed publications, electronic communiqués and other communication vehicles.
- Addresses the information needs of external audiences including alumni, the public, potential faculty, students, patients, staff, healthcare providers, and other universities/organizations;
- Addresses the information needs of internal audiences including administration, faculty, staff, and students;
- Supports the recruitment of faculty, post-doctoral candidates and all students;
- Augments support for work processes, including the use of applications, e-transactions and automated processes for content management;



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Description

- * Authorizes project
- * Establishes high-level scope, schedule, budget, risks
- * Establishes baselines, assumptions, common ground
- * Gets everyone on board
- * No project charter = no project
- * Without charter, project can close early

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Project Charter Template

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Project Charter Template

The purpose of the project charter is to authorize the project, to define scope, stakeholders, milestones, issues, risks, assumptions, and budget at a high level, and to secure signoff from internal stakeholders.

1.0 PROJECT IDENTIFICATION	
1.1 Name	<Enter the name of the project>
1.2 Description	<Enter the description of the project>
1.3 Customer	<Enter the name of the customer>
1.4 End User	<Enter the name of the end user>
1.5 Project Manager	<Enter the name of the assigned Project Manager>
1.6 Key External Stakeholders	<Enter the names of key external stakeholders and decisionmakers, for example, vendor contacts, general contractor contacts, or government or public entities>
1.7 Key Internal Stakeholders	<Enter the names of key internal stakeholders and decisionmakers>
1.8 Key Team Members	<Enter team members>
1.9 Project Duration	<Enter project duration in number of months and planned start date to planned completion date, for example, "3 months, January-June 2018">
2.0 BUSINESS CASE/OUTCOME (OPTIONAL)	
2.1 <Describe the current situation, problem, or opportunity. Next, describe how the situation or problem can be resolved, or opportunity realized, through this project. Finally, describe the intended situation after the project has been completed>	
3.0 PROJECT GOALS	
3.1 <List the goals for the project below. These goals should be SMART: Specific, Measurable, Achievable, Realistic and Time-bound. Goals should at least be measurable and integrated with performance reporting for the project>	

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4.0 PROJECT SCOPE

<Define the scope of the project clearly as to what will be included in the project and what are not included in the project and what will be considered a change>

4.1 The following items are included within the scope of the project:
4.1.1 <First high-level item to be included>
4.1.2 <Second high-level item to be included>
4.1.3 <Third... add more lines as needed>
4.2 The following items are excluded from the scope of the project:
4.2.1 <First high-level item to be excluded>
4.2.2 <Second high-level item to be excluded>
4.2.3 <Third... add more lines as needed>

5.0 KEY PROJECT DELIVERABLES

Name	Description
5.1 <Deliverable>	<List the deliverable name in the left column and describe it here. A deliverable is defined as a tangible or intangible object produced <u>WILL BE</u> at the project that is intended to be delivered to a customer>
5.2 <Deliverable>	<List the deliverable name in the left column and describe it here. A deliverable is defined as a tangible or intangible object produced <u>WILL BE</u> at the project that is intended to be delivered to a customer>

6.0 MILESTONE DATES

Item	Major Events / Milestones	Month/Year
6.1 A - External	All agreed-upon milestones with the customer. Also refer (hyperlink) to the contract for details.	06/2018
6.2 B - Internal	All <u>projected</u> aspects that need to happen to make the project complete on time.	07/2018

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7.0 KEY ISSUES UNKNOWN

Severity (0-100%) Description

7.1	<High issues in priority order and assign a severity of High (75), Medium (50), or Low (25). An issue is a known factor that the project team needs to be aware of, or an event that has 100% certainty of happening during the project>
-----	--

8.0 RISKS (POTENTIAL ISSUES THAT MAY OR MAY NOT HAPPEN)

#	Risk Event Description	Time Frame	Probability	Impact	Response Strategy/Plan
8.1	<Risk description, for example, a project team losing a provider's capabilities>	06/2018-12/2018	Medium	High	<Outline the risk response plan>

9.0 CRITICAL SUCCESS FACTORS

<Outline projects critical success factors. For example>

9.1	Effective communication among stakeholders and with customers.
9.2	Stakeholder training on a project-specific basis.
9.3	Outsourcing a project-specific task.

10.0 ASSUMPTIONS

<List important assumptions being made. For example>

10.1	Funding and support from the sponsor <u>WILL BE</u> as planned.
10.2	The marketplace will be sufficient to accommodate any new product requests.
10.3	Stakeholder early involvement will occur.

11.0 PROJECT BUDGET

#	Project Budget	Amount	Funding Source/Budget
11.1	<List the project budget that is funded>	\$	Source
11.2	<List the project budget that is funded>	\$	Source
11.3	<List the project budget that is funded>	\$	Source
11.4	<List the project budget that is funded>	\$	Source

12.0 SIGNOFF

<List key internal stakeholders (listed in Section 1.7) sign here>

12.1	<Signature>
12.2	<Signature>
12.3	<Signature>

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Best Practices and Pitfalls

Best Practices	Pitfalls
Include major stakeholders	Leaving out key roles
Account for: <ul style="list-style-type: none">✓ In / out of scope✓ Risks✓ Contingency Reserve✓ Assumptions	Leaving out key components
Get approval before starting the project	Proceeding without approval

2. Stakeholder Analysis



Description

- * Identifying stakeholders
- * Creating the stakeholder register
- * Performing stakeholder analysis
 - ✓ Stakeholder Engagement Matrix
 - ✓ Stakeholder Influence Matrix
- * Stakeholders can remove barriers . . . or add them



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Stakeholder Register

- * Identify primary vs. secondary stakeholders
- * Identify internal vs. external stakeholders

RefineM Stakeholder Register Template

Project: [Enter Project Name]

Date: [Enter Current Date]

The purpose of the stakeholder register is to list all internal and external stakeholders and capture their details, including preferred communication, expectations, interest, and influence.

1. List all internal and external stakeholders.
2. List all the stakeholder information and fill the respective columns.

S.No	FirstName	LastName	Department/Group	Role	Internal/External	Preferred Communication	Expectations	Interest	Influence	Result	Notes
1	NK	Shrivastava	Production	PM	Internal	Videoconference	On time, on budget	Positive	High	Champions	In charge of production team.
2	Keith	Roberts	Vendor	Vendor	Internal	Face to Face	Project Success	Positive	High	Champions	
3	Andrew	Fuller	Vendor	Vendor	External	Weekly Meeting	Contract Assigned	Positive	Low	Advocates	
4	George	Jones	Purchase	Supplier	External	Monthly Meeting	Project Success	Negative	High	Barriers	
5	Chris	Young	Supplier	Supplier	Internal	Weekly Report	Project Success	Negative	High	Barriers	
6	Sri	Vidya	Supplier	Supplier	External	Phone	Project Success	Negative	Low	Bystanders	
7	Jerry	Little	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	
8	Debbie	Jacobs	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	
9	Robin	George	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	Low	Advocates	
10	Bernie	Smith	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	

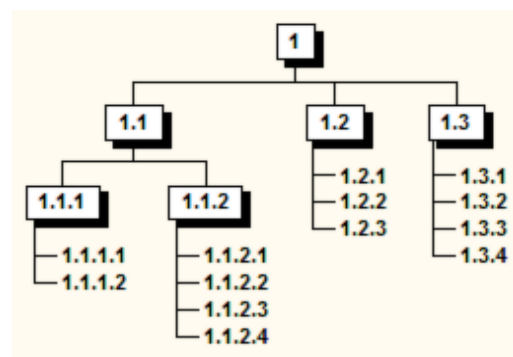


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Best Practices and Pitfalls

Best Practices	Pitfalls
Include all stakeholders	Missing stakeholders
Map stakeholders to communication plan	Developing a communication plan w/o stakeholder inputs
Have a plan for improving engagement levels	Letting others see sensitive information

3. Work Breakdown Structure



Description

- * WBS is the hierarchy used to define project scope
- * Provides framework for organizing, managing work
- * Necessary part of determining schedule
 - ✓ Activities come from work packages
 - ✓ Without WBS, project can be hurt by scope creep

WBS Template

RefineM **Work Breakdown Structure (WBS) Template**
 Project (Level 0): [Enter Project Name]
 Date: [Enter Current Date]
The purpose of the Work Breakdown Structure (WBS) is to define the full scope of the project in term of deliverables, work packages, and activities.

1. List all deliverables, work packages, and associated activities.
2. List who each activity is assigned to and the estimated start and end dates.
3. Refer to the hierarchy example and other examples if you need clarification.

Deliverable (Level 1)	Work Package (Level 2)	Activities (Level 3)	Assigned To	Start Date	End Date
1.0.	1.1.	1.1.1.			
	1.2.	1.2.1.			
	1.3.	1.3.1.			
	1.4.	1.4.1.			
2.0.	2.1.	2.1.1.			
	2.2.	2.2.1.			
3.0.	3.1.	3.1.1.			
	3.2.	3.2.1.			

Best Practices and Pitfalls

Best Practices	Pitfalls
Collaborating with key members of the team	Listing requirements instead of deliverables
Using 100% rule ✓ All work should add to 100%	Not checking to see if work equals 100%
Estimating work packages for time and cost and assigning them to team members	Decomposing too little or too much

4. Resource Allocation



Description

- * Process of managing people, equipment, materials
- * Can be done with spreadsheet or Microsoft Project
- * Managing availability and level of allocation
- * Essential to win support from team, managers
 - ✓ Scheduling realistically helps achieve this



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Template



Resource Allocation Template

Project: [Enter Project Name]

Date: [Enter Current date]

The purpose of the Resource Allocation template is to list labor resources, quantities and skillsets required, and their availability to coordinate resource assignments.

1. List all labor resources, how many of each is required, and what their responsibilities and skillsets are.

2. List the expected Start and End dates for each resource.

Role	Responsibilities	Number Required	Skillset	Start Date	End Date
Project Manager	Cost, Quality, Human Resource Management	1	Microsoft Office (Project, Excel, Visio), Earned Value Management	6/1/2018	6/30/2018
Third-party Vendor	R&D	1		6/1/2018	7/31/2018
Infrastructure Tech		1			



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Best Practices and Pitfalls

Best Practices	Pitfalls
Keeping long-term project pipeline in mind	Allocating without checking commitments or constraints
Considering team environment	Failing to update allocation
Keeping resource allocation at 80% maximum	Over-allocating resources

5. Project Schedule



Description

- * Schedule provides time sequence for activities
- * Pivotal tool for any project
- * Aligns the team to milestones
 - ✓ Also key dates and deliverables
- * Stakeholders will expect a schedule

Template

ID	Task Mode	Task Name	Work	Duration	% Complete	Start	Finish	Predecessors
1		Project Complete	0 hrs 3 days		0%	8/22/13	8/26/13	
2		Major task1	0 hrs 2 days		0%	8/22/13	8/23/13	
3		Task1.1	0 hrs 1 day		0%	8/22/13	8/22/13	
4		Task1.2	0 hrs 1 day		0%	8/23/13	8/23/13	3
5		Task1.3	0 hrs 1 day		0%	8/23/13	8/23/13	3
6		Major task2	0 hrs 2 days		0%	8/22/13	8/23/13	
7		Task2.1	0 hrs 1 day		0%	8/22/13	8/22/13	
8		Task2.2	0 hrs 1 day		0%	8/23/13	8/23/13	7
9		Major task3	0 hrs 3 days		0%	8/22/13	8/26/13	
10		Task3.1	0 hrs 1 day		0%	8/22/13	8/22/13	
11		Task3.2	0 hrs 1 day		0%	8/23/13	8/23/13	10
12		Task3.3	0 hrs 1 day		0%	8/26/13	8/26/13	11

Best Practices and Pitfalls

Best Practices	Pitfalls
Getting input from those performing work	Proceeding without input from key team members
Rooting estimates in reality, neither too pessimistic nor too optimistic	Using a scheduling tool without proper training
Updating schedule on regular intervals (weekly)	Abandoning schedule when it starts to slip

6. Communication Plan



Description

- * Communication Plan establishes:
 - ✓ What needs to be communicated
 - ✓ Who needs to send and receive communications
 - ✓ When and how often they need to send and receive
 - ✓ The purpose of communication and how it will occur

Communication Plan Template



Communication Plan Template

The purpose of the communication plan template is to establish communication events, their providers and recipients, their purpose and frequency, their medium, and the deliverable of each in order to facilitate communication and documentation.

Project: [Enter Project Name]

Date: [Enter Current Date]

ID	What (Event)	Who (Target)	Why (Purpose)	When (Frequency)	How (Medium)	What (Deliverable)	Who (Provider)
	Describe the event.	Define the target audience.	Define the purpose of this event.	Set the frequency of communication.	Define the medium of communication.	Define the documentation/follow-up item.	Identify who is responsible.
1	Initiation Meeting	All stakeholders	Gather requirements	Once before the project start date	Face-to-face meeting	Meeting minutes in project folder	Project Manager
2	Milestone Report	Project Sponsor	Communicate plan to stakeholders	Once before the project start date	Face-to-face meeting	Meeting minutes in project folder	PMO
3	Status Report	Project Manager	Update stakeholders	Monthly	Face-to-face meeting	Meeting minutes in project folder, To-Do List	Project Manager
4	Outsourcing Performance	Staff and Customer	Update customer	Bimonthly	Videoconference	Meeting minutes in project folder	Project Manager

Best Practices and Pitfalls

Best Practices	Pitfalls
Using $(n*(n-1)/2)$ to assess channels	Failing to identify sources of noise
Assessing available infrastructure	Failing to identify all communication events
Completing stakeholder analysis first	Failing to update as new stakeholders come in or leave

7. Risk Register



Description

- * Project hub for collecting:
 - ✓ Risks, owners, root causes, responses
 - ✓ Probability and Impact
- * Risks can be catastrophic
 - ✓ Especially if you are unprepared
- * Risks can also be opportunities – don't miss them

Risk Register Template

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Risk Register Template

Project: [Enter Project Name]

Date: [Enter Current Date]

The purpose of the risk register template is to log and track risks, risk probability and impact, and risk responses and triggers. It also totals Expected Monetary Value (EMV) to establish a risk contingency reserve.

- Describe the risk and list the date up to when it could occur.
- List probability and impact in days and dollars in columns D-G. Columns H and I will auto-populate.
- Identify risk owner, risk response, and trigger for when the risk happens.

Risk ID	Risk Description	Risk Date	Probability		Impact		EMV		Risk Owner	Risk Response	Trigger
			%	L/M/H	(Days)	(Cost)	(Days)	(Cost)			
1	Team Member A leaves the project	09/15/18	70%	H	6	\$1,500.00	4.2	\$1,050.00	Keith	Prepare backup	
2	Data Migration is not complete by planned date	10/31/18	50%	H	5	\$2,500.00	2.5	\$1,250.00	Andrew	Monitor closely, every week	
3	Team members are reassigned to other projects	12/01/18	50%	M	20	\$3,000.00	10.0	\$1,500.00	George	Ensure project remains high priority	
4	Project delay causing financial implication	Project end date	90%	H	10	\$4,000.00	9.0	\$3,600.00	Functional Manager	Ensure billing is on time, manage scope tightly, ensure you get change order	Progress report, resource decline
5	Delays due to weather conditions										
6											
7											

Best Practices and Pitfalls

Best Practices	Pitfalls
Looking for all potential sources of risks	Failing to update risk register on regular basis
Collaborating with stakeholders, team members, vendors & suppliers	Failing to identify key stakeholders
Considering opportunities	Missing opportunities

8. Performance Reporting



Description

- * Performance report may include:
 - ✓ Deliverables
 - ✓ Milestones
 - ✓ Activities
 - ✓ Cost/Budget
 - ✓ Quality
 - ✓ Risks/Issues
- * Decisions need to be backed up by data



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Performance Reporting Template



Weekly Performance Reporting Template

[Enter Project Name]

[Enter Current Date]

The purpose of the weekly performance reporting template is to track deliverables, targeted completion, and cost and report to stakeholders.

1. Enter the deliverable / top-level tasks from the Work Breakdown Structure (WBS) and assign responsibility.
2. Enter target completion date, original estimated costs, estimate to complete, and actual costs to date (columns C, E, F, and G).
3. Projected Costs and Projected vs. Estimate (Columns H and I) will auto-populate. Based on these, complete the % Complete (column D)

Top-Level WBS Tasks	Responsibility (Assigned To)	Target Completion Date	% Complete	Original Estimated Costs	Actual Costs To-Date	Estimate to Complete	Projected Costs	Projected Costs vs. Estimated Costs
Design			25%	\$30,000.00	\$5,000.00	\$27,000.00	\$32,000.00	\$2,000.00
Approval								
Assembly								



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Best Practices and Pitfalls

Best Practices	Pitfalls
Considering audience needs	Failing to provide complete report
Getting explicit reporting requirements from stakeholders	Missing variances and trends (too subjective)
Including variances, trends, projections	Missing risks and issues (too reactive)

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Everything boils down to just 8 Critical Processes

As against 49 processes of PMBOK 6th edition

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Conclusion

- * To complete projects successfully:
 - * Focus on bare essential processes
 - * Execute the essentials correctly and consistently throughout the duration of the project

That's the recipe of delivering projects successfully

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Next Lunch and Learn

* **Agile Maturity**

- ✓ How do you know how you are doing on your Agile journey?
- ✓ What are the areas where your team is doing well?
- ✓ What are the areas that they need to focus?
- ✓ How do you measure and consistently improve?

* **Wednesday, December 5, 12:00-1:00 PM Central**

Register Today - Don't wait for the last Minute

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1. Visit ccrs.pmi.org and log in.
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3. Click "Courses and Training" in upper left.
4. **Activity Name:** "The Recipe for Successful Project Delivery"
(complete this first, before you go to #5)
5. **Provider:** "RefineM LLC" *(don't select dropdowns)*
6. **Date started:** November 7, 2018
7. **Date completed:** November 7, 2018
8. **Contact person:** NK Shrivastava
9. **Contact phone:** (417) 763-6762
10. **Contact email:** Trainings@RefineM.com
11. **PDUs:** 1.00 Technical.
12. Click on the "I agree this claim is accurate" box and then Submit.

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Questions?



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Training Opportunities From RefineM

Training Title	Online	Kansas City	Raleigh	Los Angeles	San Diego
PMP® Exam Prep	Dec 03-11				
Agile Fundamentals / Agile 101	Nov 26-30				
PMI-ACP® Exam Prep	Nov 26-Dec 02				
Leadership Skills for Managers			Dec 06	Dec 05	Jan 23
Kanban Fundamentals / Kanban 101		Dec 10			
Project Management Fundamentals					Jan 24-25
Business Requirements Gathering for Agile	Dec 08				

Visit <https://refinem.com/training/public> for more details.

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