# Table of Contents

## Professional / Consulting / Managed Services
- The RTM Consulting Training Difference
- PS University
- PS University Introduction
- PS University Learner Paths
- Consulting Fundamentals
- Advanced Consulting Skills Development
- Project Management Fundamentals
- Advanced Project Management Skills Development
- Introduction to Resource Management
- Resource Management Certified Professional (RMCP)® Program
- The Art of Writing an SOW
- Economics of Professional Services
- Delivery Manager Skills Development
- Services Sales Skills Development

## Support / Field Services

## Enterprise IT

## Programs and Certifications
- Resource Management Certified Professional (RMCP)® Program

## Skills Development and Training Services
- Performance Improvements Through Variability Reduction
- Customized Training
- Learning Needs Assessment
- Mentoring Services
- Measuring the ROI of Training

## Learn More About RTM Consulting
- Contact an RTM Consulting Training Expert
- About RTM Consulting
The RTM Consulting Training Difference

Expert content developed by real practitioners in your industry

⇒ Our focus is to develop ‘practical skills’ - skills you can use the very next day
⇒ Our courses are developed and taught by people who have “been there, done that”
⇒ Our courses feature a combination of instruction and interactive discussion
⇒ Our trainers bring real life scenarios/examples to the training making it relevant to the audience

Flexible Delivery Options

RTM Consulting has extensive capabilities to deliver training the way you need it to accommodate specific learning needs, budget requirements or student availability.

⇒ **On-site:** at your location or a mutually agreed venue
⇒ **On-line:** private virtual or public virtual capabilities
⇒ **On-demand:** pre-recorded streaming video available up to 24x7 on any web accessible device
⇒ **Blended:** utilizing more than one delivery method, e.g. online pre-req and then in person

Experiential learning

⇒ We strongly believe in reinforced learning - that’s why we use case studies in both ILT (in person and online) and On-Demand training
⇒ We design case studies to drive role play sessions intended to allow participants to practice what they are learning
⇒ When possible, case studies are tailored to the customer and services group
⇒ We also offer continuous learning sessions which allow the students to report back on actual field experience 1-2 months after the training

Worldwide Delivery

Our training has been delivered in over 25 countries. Our instructors understand the cultural nuances associated with working in the global economy and are able to tailor their message to their audience.

On-line Test Creation and Administrative Options

Skilled trainers can help recommend, develop and administer testing in support of your particular learning needs, including certifications programs. Our on-line testing capabilities allow convenient access to testing, scoring and reporting.

Customization

For those who need a more tailored approach to training, we offer full life-cycle customization of our courses/modules to ensure maximum return on your training investment.

Student Progress Reporting

Companies utilizing RTM Consulting private virtual and on-demand training have the option of receiving student progress reports on training module completion and test results.

RTM Consulting has been named a Registered Education Provider (R.E.P) by the Project Management Institute. R.E.P.s have met PMI’s rigorous quality criteria for course content, instructor qualification and instructional design.
SECTION 1

PS UNIVERSITY
Transform Your Services Business
RTM Consulting has developed an innovative approach to address the ongoing learning and development needs of Professional Services Organizations while saving both time and money. PS University is a strategic skills development program dedicated to the development of the PS skills service practitioners need to be successful in today’s technology services environment.

**PS University Highlights:**

The most effective Professional Services Organizations recognize that skills development cannot be done in the margins and view training as a strategic initiative that requires thoughtful planning vs. a one-time event. They foster a culture of continuous learning and align learning and development with the role and career progression goals of their employees.

- **PS Specific Training** - Training content developed for PS practitioners and delivered by PS experts
- **Programmatic Approach** - University concept with delivered role-specific learner paths
- **Experiential Learning** - Real life examples, practical case studies, and continuous learning opportunities
- **Flexible Pricing Options** - Team classes, individual courses, or subscription model
- **Flexible Consumption Options** - Classroom ILT, web-based ILT, or on-demand
- **RTMC Support** - Planning, role mapping, testing, LMS, auto enrollment, and regular checkpoints

**Logistics:**

Whether you are looking for an entire curriculum of training or a specific course, PS University provides your Professional Services Organization with the professional services training your employees need to be successful.

**Why PS University?:**

- Supports a programmatic approach to skills development in key skill areas such as: consultative and client interaction capabilities, effective client management and communication, outcome-focused solution delivery, scalable operations skills including project and resource management, and outcome-focused services marketing and sales capabilities.
- Provides the framework, training and necessary measurements practitioners and Professional Services Organizations need.
- Includes training curriculum that has been designed for professional services professionals by professional services experts and covers all resources in the organization – delivery practitioners, project managers, operations managers, resource managers, services sales and marketing, and delivery managers.
- Flexible delivery and consumption models designed to make it easy for your team members to get the training they need when and how they need it.
- Flexible pricing designed for entire Professional Services Organizations, specific teams, or individuals to be able to get the training they need.

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PS University takes the guesswork out of developing a detailed training plan through our role-based learner paths that outline highly-specific training curriculum for roles that are likely already defined in your Professional Services Organization. This makes it easy to provide employees with training that is relevant to their development needs and sequenced in a way that helps them absorb information over time. The learner paths below are flexible and can be tailored to accommodate the unique needs of your organization.

**Delivery Practitioner:**
- PS-101: Consulting Fundamentals
- PS-205: SS- Standard Engagement Lifecycle
- PS-210: SS Role & Dynamics of a Consultant
- PS-215: SS Communication Strategy & Tactics
- PS-320: SS Risk & Issue Management
- PS-325: SS Scope & Change Management
- PS-330: SS Identifying & Capturing Value
- PS-425: The Art of Writing an SOW
- PS-430: Economics of Professional Services

**Delivery Manager:**
- PS-205: Standard Engagement Lifecycle
- PS-210: Role & Dynamics of a Consultant
- PS-215: Communication Strategy & Tactics
- PS-320: Risk & Issue Management
- PS-325: Scope & Change Management
- PS-330: Identifying & Capturing Value
- PS-450: Delivery Manager Skills Development

**Project Manager:**
- PS-201: Project Management Fundamentals
- PS-305: Role & Dynamics of a Project Manager
- PS-310: PM Communication Strategy & Tactics
- PS-315: PM Scope & Change Management
- PS-330: PM Identifying & Capturing Value
- PS-425: The Art of Writing an SOW
- PS-430: Economics of Professional Services

**Service Operations:**
- PS-205: Standard Engagement Lifecycle
- PS-210: Role & Dynamics of a Consultant
- PS-215: Communication Strategy & Tactics
- PS-320: Risk & Issue Management
- PS-325: Scope & Change Management
- PS-330: Identifying & Capturing Value
- PS-425: The Art of Writing an SOW
- PS-430: Economics of Professional Services

**Services Engineer:**
- PS-101: Consulting Fundamentals
- PS-205: Standard Engagement Lifecycle
- PS-210: Role & Dynamics of a Consultant
- PS-215: Communication Strategy & Tactics
- PS-320: Risk & Issue Management
- PS-325: Scope & Change Management
- PS-330: Identifying & Capturing Value
- PS-425: The Art of Writing an SOW
- PS-430: Economics of Professional Services

**Resource Manager:**
- PS-350: Resource Management Certification Program (RMCP®)
Succeeding as a Consultant can be challenging. Most companies invest a lot of time, money and effort on training their consultants on products and technology. But do they really know how to: effectively prepare for their consulting assignment, work as part of a project team, engage with a client, build strong relationships, diagnose and solve problems, manage client expectations, and communicate effectively—the fundamental skills every consultant needs. This course is designed to provide foundational competency development for consultants.

**Learning Objectives:**

- Introduce the field of consulting and understand what it means to be a consultant
- Understand the nature of a consulting assignment and how to prepare for it
- Review the dynamics of working within a project team
- Discuss the essential elements of being a successful consultant with a strong focus on communications
- Learn the keys to better managing customer expectations
- Learn how to take charge of your career as a consultant

**Who Should Attend:**

- Anyone starting their career as a Consultant or making a change into the field of consulting
- Professional services technologists who need to learn the fundamentals of consulting
- Consultants wanting/needling a refresher on the fundamentals of effective consulting

**Logistics:**

This course is modular and can be adapted to meet your specific need and budget. Time commitment can range from two (2) hours to one (1) full day of content. The training can be delivered in a classroom or virtual interactive environment by a qualified RTM Consulting instructor.

**Course Highlights:**

- **What is a Consultant?**
  - Key responsibilities of a consultant
  - Attributes of a successful consultant
  - Understanding the different types of consultants
  - How is a PS technologist different from a consultant?
  - How is success measured as a consultant?

- **Behaviors of an Effective Consultant**
  - Effective communication techniques
  - Giving advice effectively
  - Managing customer expectations
  - Earning a customer’s trust
  - Building relationships with your customers

- **Working in and Across Project Teams**
  - Ways to succeed working as part of a project team
  - Importance of leveraging project teammates

- **Preparing for your Consulting Assignment**
  - Understanding your engagement
  - Understanding your role and the project team
  - Learning about the customer
  - Knowing your product/solution

- **Succeeding as a Consultant**
  - Tools a successful consultant needs: navigating difficult situations, recognizing issues and risks, and problem solving
  - Growing in your role as a consultant
  - Building and leveraging your support system

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A lot of time, money and effort is spent training consultants on products and technology. But do they really know how to: effectively engage with a client; manage scope creep; effectively handle complaints and issues; and up-sell new opportunities – the soft skills every consultant needs. The Advanced Consulting Skills Development training focuses on enhancing the consultative soft skills of consulting and professional services personnel to complement their product, business, and technical knowledge. The six (6) soft skills courses will help your technologists become better consultants.

Learning Objectives:

- Building rapport and demonstrate ongoing concern for the customer
- Talking about ideas and solutions in a customer-centric way—talking value and results, less about activities
- Engaging in constructive conversations that end with clear agreements, responsibilities and actions to move forward
- Applying techniques in discussion / presentation that build credibility
- Learn effective communications specific to varying stakeholder groups
- How to manage issues that arise during engagements
- Learn approaches to successfully manage (project) scope
- How to work within and across teams

Who Should Attend:

- Consultants / PS Personnel
- Other Technical Services Personnel
- Practice Leads / Managers

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Logistics:

The six (6) courses are modular and can be customized to meet your specific need and budget. Time commitment can range from one (1) hour for an individual course on-demand to 3 days of content for all six (6) courses combined with case studies. Delivery methods can be combined to be suit the needs of the audience.

Course Highlights:

PS-205: Standard Engagement Lifecycle/Process
⇒ Discusses a consultants role, key behaviors, and interaction in each stage of an engagement

PS-210: Role & Dynamics of a Consultant
⇒ Provides processes and methods that help consultants build effective relationships with your customers
⇒ Identifies techniques for how to become the ‘Trusted Advisor’ to your customers

PS-215: Communication Strategy & Tactics
⇒ Discusses effective communication techniques, written and verbal, good listening skills, developing and delivering key messages
⇒ Teaches tools and techniques for communicating information to various levels and stakeholders

PS-320: Risk & Issue Management
⇒ Delivers tools and techniques for communicating and managing issues and risks while maintaining client satisfaction

PS-325: Scope & Change Management
⇒ Provides tools and techniques for managing scope in various environments (e.g., T&M vs. Fixed Bid)

PS-330: Identifying & Capturing Value
⇒ Teaches how to overcome the fear technical resources often have with “up-selling” and where to look for opportunities
⇒ Discusses how to communicate value propositions, focusing more on outcomes
Poor project execution is a leading driver of services margin erosion and poor customer satisfaction. Project Managers continually look to enhance their project management skills and drive successful delivery. The Project Management Workshop is specialized PM training for the technology and software industries. The curriculum is designed to reinforce and improve good PM discipline and teach proven, practical aspects of sound project management to achieve breakthrough results and customer satisfaction.

Learning Objectives:

- Define the behaviors and attributes that are characteristic of a successful project manager
- Explain project management responsibilities
- Apply the project management responsibilities in practice

Who Should Attend:

- Project Managers
- Program Managers
- Project Team Leads

Logistics:

The training can be a classroom led or virtual interactive session with group discussion and individual exercises led by a qualified RTM Consulting instructor.

Course Highlights:

Role & Dynamics of a Project Manager
- Expectations of a project manager
- The importance of project authority
- Project vs. Program management
- Importance of leveraging project support

Behaviors of an Effective Project Manager
- Key management behaviors
- Leadership, problem solving, communication, navigating difficult situations and managing expectations

Project Management Responsibilities
- Review the five PM process groups
- Review project management responsibilities in the ten PMI knowledge areas
- Review concepts and practical application of the concepts in all knowledge areas

Closing Projects
- Identifying opportunities
- Customer satisfaction
- Lessons learned
A lot of time, money and effort is spent training project managers on methodologies. But do they really know how to: effectively engage with a client; manage scope creep; and effectively handle complaints and issues – the soft skills every project manager needs. The Advanced Project Management Skills Development training focuses on enhancing the soft skills of project managers to complement their methodology, business, and technical knowledge.

Learning Objectives:

- Define the role and responsibility of a project manager
- Explain how to develop and deliver key messages and decide what to communicate and to whom
- Define tools and techniques for communicating various types of information
- Apply communication skills for more effective issue management
- Demonstrate why scope definition is critical
- Apply scope management techniques

Who Should Attend:

- Project Coordinators
- Project Managers
- Project Team Leads

Logistics:

The three (3) courses are modular and can be customized to meet your specific need and budget. Time commitment can range from one (1) hour for an individual course on-demand to one (1) day for all three courses combined with case studies. Delivery methods can be combined to be suit the needs of the audience.

Course Highlights:

PS-305: Role & Dynamics of a Project Manager
⇒ Defines the role and responsibility of a project manager; explores responsibility and authority
⇒ Discusses behaviors of a successful project manager
⇒ Provides insights and techniques for meeting management

PS-310: Communication Strategy & Tactics
⇒ Discusses what to communicate to and to whom
⇒ Develop and communicate key messages
⇒ Delivers tools and techniques for how to communicate issues and risks effectively

PS-315: Scope & Change Management
⇒ Effective practices for scope management
⇒ Managing change and its relationship to scope management
⇒ Tying concepts of communication and tools for managing scope and change processes

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Resource Management is the centerpiece of an iterative process managing both information and process designed to align skilled team-members with expectations for current and future project needs. Efficient Resource Management leads to improved project performance, improved utilization of human capital, better customer satisfaction for internal and external customers, reduced employee attrition, and reduced time management is involved in staffing issues. This course is designed to provide foundational competency development for professionals new to resource management that work in organizations that focus on project-based work. Participants primarily work in Professional Services Organizations or Internal IT Organizations.

Learning Objectives:

• Review the foundational concepts of resource management and how it supports the organization
• Understand the fundamentals of characterizing resource supply and demand through skills management, processing staffing requests and forecasting future demand
• Understand the role technology and governance play in effective resource management

Who Should Attend:

⇒ People who work as Resource Managers or perform resource management related tasks
⇒ Operations or People Managers who need a stronger knowledge of resource management
⇒ People wishing to update their current resource management knowledge with industry accepted best practices
⇒ People wanting to break into the competitive and growing Resource Management profession

Logistics:

This course is comprised of four hours of instructor led training by a qualified RTM Consulting instructor. Training is delivered in two, 2-hour virtual interactive sessions. Also available is a $200 rebate for anyone who completes the Intro to Resource Management course and then registers for and completes their RMCP® certification within 24 months from when they completed the Intro to Resource Management course.

What We Teach / How We Teach:

⇒ Just-in-Time Resourcing® is RTM Consulting’s brand of human capital management solutions
⇒ Just-in-Time Resourcing® supports the capability to facilitate getting the right person in the right place at the right time
⇒ We teach what the right set of RM capabilities are and why they are important to accomplish the most efficient use of human capital for Professional Services organizations and Internal IT Operations
Services providers are constantly being challenged to provide the right resources at the right place at the right time to maximize margins and project performance. Over the next decade, effectively and efficiently sourcing and managing resources will be the new high water mark for the industry. At the same time, reliable resource management experts who follow a proven process discipline are in short supply. This first-of-its-kind professional certification program is specifically designed for promoting and supporting competency development for Resource Management professionals.

**Learning Objectives:**

- Understand modern and practical resource management techniques and stay current with industry best practices.
- Review and practice the Global Resource Management (GRM) methodology which underpins Just-in-Time Resourcing® (JITR), RTM Consulting's brand of human capital management solutions, helping your company facilitate getting the right person in the right place at the right time.
- Understand how JITR can alleviate the pressures services organizations face - from billable utilization to project overruns to employee development.

**Who Should Attend:**

- People who work as or lead Resource Managers or perform resource management related tasks
- Operations or People Managers who need a stronger knowledge of resource management
- People wishing to update their current resource management knowledge with industry accepted best practices
- People wanting to break into the competitive and growing Resource Management profession

**Logistics:**

This is a comprehensive program including prerequisite study material, a three (3) day onsite or six (6) week online program including interactive class sessions and practical exercises led by a qualified RTM Consulting experts, and certification testing.

**Certification Process Overview:**

Apply for Certification / Complete Pre-reqs

- Apply online via RTMCs LMS
- RTMC will review application and notify of eligibility
- Complete required pre-reading/exercises

Attend Certification Program

- In Person (3 days) or Online (6 weeks)
- Reference materials to help put the learning into practice

Take Exam

- Certification exam conducted at conclusion of program
- Exam results will be immediate

Recertification Process

- Certification will be active for two years
- 20 Professional Certification Units (PCUs) needed for recertification
- Recertification can also be achieved by retaking exam

**Eligibility Requirements:**

Must Meet Educational and Professional Experience Requirements*

- High school diploma / any associates degree and minimum four years of RM or PS experience
- Any bachelor's or master's degree and minimum two years of RM or PS experience

*Full requirements list is located in the RMCP® Handbook
The Statement of Work (SOW) sets the foundation for the scope, financial terms (payment terms, etc.) and delivery terms for your project. SOWs with incomplete or inaccurate details can often result in tension and conflict within delivery teams, contribute to unsatisfied customers, and possibly introduce potential legal and/or financial risks. Poorly written SOWs, containing in-explicit terms and ambiguous scope, set a project up to fail. SOWs require a strong process for development, approval and governance. The SOW writing course will provide your team with the knowledge, tools, and confidence to write full scope, detailed SOWs and ensure more successful project delivery.

Learning Objectives:

- Understand the necessary elements of a solid Statement of Work.
- Acquire the knowledge and tools to help write a successful statement of work.
- Translate how a strong statement of work leads to successful solution delivery.
- Learn the potential pitfalls of SOW writing and how to avoid them.
- Gain knowledge of best practices around SOW writing and governance.

Who Should Attend:

- Project and Program Managers
- Project Coordinators
- Services Sales
- Resources responsible for SOW creation

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Profitability is the lifeblood of a Professional Services Organization. The economics behind PS profitability boils down to being able to price, plan, and execute projects all while keeping resources utilized. Good practices and good economic measurement go hand in hand. Does your organization understand what to measure, how to measure it, how to set appropriate targets, and the ways to manage drivers of PS profitability? This specialized course is designed to provide your team with the knowledge to understand the economics behind Professional Services.

**Learning Objectives:**

- Understand the key economic drivers of a Professional Services Organization.
- Learn how to define, calculate and set proper targets for utilization.
- Understand the variables that drive project profitability and how to manage them.
- Learn about foundational practices that have significant impacts on PSO economics.

**Who Should Attend:**

- Consultants / PS Personnel
- Project Managers
- Service Operations Personnel
- Practice Leads / Managers

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**Logistics:**

This is a two (2) hour course. The training can be a classroom led or virtual interactive session with group discussion and individual exercises led by a qualified RTM Consulting instructor.

**Course Highlights:**

**Key Economic Drivers of Professional Services**

- PS economics - driven by profitable projects and keeping resources utilized

**Understanding Utilization**

- Define what time categories to measure
- Discuss how to calculate utilization and set the right targets for your organization
- Review the impact effective utilization and staff leverage have on profitability

**Managing Profitable Projects**

- Understand the cost to deliver services and its impact on profitability
- Review service pricing concepts and why good pricing is important to profitability

**Understanding Industry Benchmarks**

- Review the essential elements and industry benchmarks in the PS financial model
Making the transition from a delivery expert to a delivery manager role is not always easy. Most companies’ Human Resources departments help with the vital aspects of people management (hiring, firing, compensation, etc.), but few deal with equipping a delivery manager with the proper skills necessary for effective execution of the operational aspects of delivery management. This intensive course will prepare your delivery manager to hit the ground running and feel confident in their ability to help manage your projects on-time and on-budget.

**Learning Objectives:**

- Learn the critical aspects and success factors for delivery managers
- Understand how to transition from the delivery ‘doer’ to the delivery leader
- Understand how to build better collaboration with your sales team, and the critical touch-points that mean the difference between success and failure for project handoffs and client satisfaction
- Review the fundamentals of resource and project/portfolio management
- Learn practical techniques for managing/governing projects and the key metrics common to the PS industry today including dashboard management
- Learn the soft skills necessary for you and your delivery team to be more effective in client interactions and managing expectations

**Who Should Attend:**

- First time delivery managers
- Recently and newly assigned delivery managers
- Delivery managers wanting/needng a refresher course on delivery management

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**Logistics:**

This course is comprised of six and a half (6.5) hours of on-demand online pre-requisite training and two (2) days of in-class study led by a qualified RTMC instructor. A post course mentoring option is available—two hours/month for three months delivered remotely by RTMC delivery management experts.

**Course Highlights:**

**Consulting Soft Skills (on-demand pre-requisites)**

**Intro to Role of the Delivery Manager**

**Sales/Opportunity Management**

⇒ Sales communications
⇒ Proposal development and SOW writing

**Resource Management Fundamentals**

⇒ Centralized vs. decentralized models
  ◊ Skills management/planning
  ◊ Resource planning/scoping
  ◊ Forecasting

**Project Management Fundamentals**

⇒ Project execution basics
  ◊ Project scoping/budgets
  ◊ Scope/risk/issue management
  ◊ Partner integration
⇒ Managing large vs. smaller projects
⇒ Portfolio (vs. project) management

**Governance and Continuous Improvement Techniques**

**Managing the Transition from Doer to Manager**
Selling services is different than selling a product. This course helps its participants understand the differences and provides the insight, context and tools to become more successful at selling services. This course also assists delivery leaders making the transition from pure delivery roles to ones that involve sales and business development. The course identifies the basics of building stronger and more valued customer relationships, and focuses on addressing their goals, problems and needs. The course will enable its participants to more effectively identify, propose and close more services opportunities.

**Learning Objectives:**

- Describe how to sell consulting and professional services
- Develop stronger customer relationships and formulate a better understanding of their needs
- Explain what it means and how to sell value
- Develop better mechanics in identifying, proposing and closing services sales opportunities

**Who Should Attend:**

- Sales Representatives (with Services Sales responsibility)
- Delivery/Engagement Leaders and Managers

**Logistics:**

This is a one (1) day course. The training can be a classroom led or virtual interactive session with group discussion and individual exercises led by a qualified RTM Consulting instructor.

**Course Highlights:**

**Role of a Services Salesperson**
- Basics of the role - define what makes a successful services salesperson
- Understand stakeholder management and managing different client resources in the sales process
- How to develop trusted advisor relationships with your client stakeholders
- Time management and prioritization

**Identifying and Selling Value**
- Techniques for identifying your client’s goals, problems and needs
- The value proposition: what is it and why is it important
- Identifying the value drivers of your client

**Advanced Selling Techniques**
- Conditioning the customer to the offer
- Constructing and communicating the value proposition
- How to structure and position your proposal
- Closing the deal

**Handling Objections to Services Deals**
- Importance of pre-call objection handling
- Effective questioning and listening
- Objective handling techniques
- Understanding how to leverage different deal structures
Services providers are constantly being challenged to provide the right resources at the right place at the right time to maximize margins and project performance. Over the next decade, effectively and efficiently sourcing and managing resources will be the new high water mark for the industry. At the same time, reliable resource management experts who follow a proven process discipline are in short supply. This first-of-its-kind professional certification program is specifically designed for promoting and supporting competency development for Resource Management professionals.

**Learning Objectives:**

- Understand modern and practical resource management techniques and stay current with industry best practices.
- Review and practice the Global Resource Management (GRM) methodology which underpins Just-in-Time Resourcing® (JITR), RTM Consulting’s brand of human capital management solutions, helping your company facilitate getting the right person in the right place at the right time.
- Understand how JITR can alleviate the pressures services organizations face - from billable utilization to project overruns to employee development.

**Who Should Attend:**

- People who work as or lead Resource Managers or perform resource management related tasks
- Operations or People Managers who need a stronger knowledge of resource management
- People wishing to update their current resource management knowledge with industry accepted best practices
- People wanting to break into the competitive and growing Resource Management profession

**Logistics:**

- This is a comprehensive program including prerequisite study material, a three (3) day onsite or six (6) week online program including interactive class sessions and practical exercises led by a qualified RTM Consulting experts, and certification testing.

**Certification Process Overview:**

- **Apply for Certification / Complete Pre-reqs**
  - Apply online via RTMCs LMS
  - RTMC will review application and notify of eligibility
  - Complete required pre-reading/exercises

- **Attend Certification Program**
  - In Person (3 days) or Online (6 weeks)
  - Reference materials to help put the learning into practice

- **Take Exam**
  - Certification exam conducted at conclusion of program
  - Exam results will be immediate

**Recertification Process**

- Certification will be active for two years
- 20 Professional Certification Units (PCUs) needed for recertification
- Recertification can also be achieved by retaking exam

**Eligibility Requirements:**

- Must Meet Educational and Professional Experience Requirements*
  - High school diploma / any associates degree and minimum four years of RM or PS experience
  - Any bachelor’s or master’s degree and minimum two years of RM or PS experience

*Full requirements list is located in the RMCP® Handbook
Not only are field services executives challenged with reducing costs while maintaining services levels, they are also tasked with ongoing process improvement initiatives such as better parts management, first call resolution, and vehicle fleet management. Getting to tactical results remains a priority while identifying strategic changes needed to be competitive long term is often a difficult balancing act for field services teams. Variability reduction processes are a proven method for improving field service performance tactically while also supporting a systematic approach to continuous improvement. This course exposes field services personnel to variability reduction processes which can be applied to virtually any field services performance metric. Using Lean Six Sigma techniques, this course will help jumpstart your process improvement initiatives.

**Learning Objectives:**

- Understand why you should be thinking about variability reduction as part of your ongoing process improvement initiatives
- Learn how Lean Six Sigma principles can support process improvement in Field Services’ metrics results including first visit resolution, parts management, vehicle fleet management and more
- Understand how variability reduction leads to greater customer satisfaction and retention, lower costs and overall better field service results

**Who Should Attend:**

- Support/Field Services Techs
- Support/Field Services Managers
- Support/Field Services Operations

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In the Services industry, two key attributes of success include being: flexible and adaptable. RTM Consulting recognizes that there may be certain situations where a standard training offering may not completely address desired learning objectives, or be delivered in a manner supportive of your particular situation. As such, RTMC can work with you to customize and tailor a curriculum to address your specific learning objectives – and time constraints.

Learning Objectives:
The learning objectives you have defined may include multiple components or require a deep dive in a particular area. Whatever those objectives may be, RTM Consulting can leverage its full library of skills development curriculums to provide content to address your needs. Where that content does not map exactly to your learning objectives, RTM Consulting can develop new materials to meet your needs.

The Customized Skills Development Process:
In developing customized training, RTM Consulting will begin by:

- Collecting and analyzing the learning objectives and mapping those to available training content (including RTMC, client, and commercially available content)
- Reviewing the content with the client for validation and agreement

Then RTMC can: 1) pull from its vast library of training curriculum to provide a base of materials; 2) incorporate pre-defined client and commercially available training materials; and 3) build new content.

Curriculum Examples:
RTM Consulting has built a variety of customized training curriculum, including:

1. **Project Management Soft Skills and PMP® Exam Prep** – to help a client’s Project Managers build skills to interact with clients on a more productive manner and address the organization’s desire to have more certified Project Managers

2. **Services Sales Workshop** – to help a client’s Practice Leads more effectively pursue services sales opportunities, RTMC integrated existing and built new curriculum to address the client’s needs

3. **Strategic Executive Workshop** – to educate a client’s non-Services executives on the key market drivers of the Services industry, RTMC developed a custom workshop to provide content on market drivers, organizational constructs and keys to success

RTM Consulting, Inc.
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Skills development is vital to a healthy services team. Ensuring the right outcomes for your training investment is therefore critical. Organizations that excel in skills development begin the process with skills assessments used to drive training curriculums and plans. RTMC has a proven approach to pinpointing your needs so you can ensure the best outcomes when it comes to skills development.

**Learning Needs Assessment Objectives:**

- Define and document current skills and competencies of existing personnel
- Understand and document current and future skills needs
- Create skills roadmaps and curriculum requirements

**Why Skills Needs Assessments?**

- Better focus your training investment
- Improve usable skills post-training
- Create more predictable outcomes to training

**The Needs Assessment Process:**

A skilled RTMC consultant will work with your team to understand your situation and define an approach to conducting a skills assessment. Due to the individualized nature of skills needs assessments, these are typically conducted as time and materials consulting projects.

- Examples of how we collect / document current capabilities:
  - Skills testing or surveys
  - Interviews (sampling or for smaller groups all individuals)
  - Job observations (particularly helpful to assess soft skills)
  - Employee feedback from supervisors
  - Self-assessments
  - Other

- Understand from management and others current and future skills needs of the organization
- Map skills needs to existing capabilities to create a skills gap analysis
- Document current and future requirements as input to curriculum and skills development planning
Experience does matter - and not all learning occurs in the classroom. At certain points, all of us can use a little help from someone who has been there, done that. RTM Consulting provides one-on-one and group mentoring to help Executives, Practice Leads, Managers and other personnel across the Service spectrum. This mentoring is intended to provide the recipient with advice, counsel and support on a range of topical areas including: managing a global workforce, effectively selling services, managing a delivery portfolio, running an effective help desk and more. Essentially, if there is an area impacting your achievement of profit, customer satisfaction, employee satisfaction, or other goals, RTMC’s Mentoring may be right for you.

The Mentoring Process:

RTM Consulting:

- Develops an understanding of the particular areas for development through discussions with personnel, their management and other stakeholders (as appropriate)
- Builds and gains agreement with the client to a structured program to address the particular needs – and the logistical requirements – of the personnel being mentored
- Executes the plan and refines (as appropriate)

Who Should Participate:

- Executives
- Managers
- Practice Leads
- Resource Managers
- Project Managers
- Consultants
- Customer Service Managers

Logistics:

RTM Consulting will work with you at the time and place that works best for you. Mentoring can involve in person meetings, teleconferences, web meetings and other methods of interaction. Mentoring can occur at scheduled intervals and on demand.

Mentoring Examples:

Examples of Mentoring that RTM Consulting has delivered include:

⇒ Working with the CEO of an organization with an emerging Services organization to help better understand and put into practice the drivers of profit and success in the Services industry

⇒ Working with the SVP/VP of an enterprise Service organization to optimize their cost structure in the short-run and investing returns to transform services into an engine of growth for the company

⇒ Working with Practice Leads to help the transition from managing client projects to managing a portfolio of engagements, globally distributed personnel and the myriad challenges of working in a matrixed environment

⇒ Working with Project Managers to help manage both: 1) key drivers of project success (time, scope, and quality); as well as 2) the process of using effective communication skills to keep all stakeholders (e.g., project team, client, and internal management) aware and abreast of project performance

⇒ Working with Delivery Managers to better manage overall project performance and service delivery financial performance and execution
Investing in effective training programs leads to engaged, well trained employees who stay with companies longer, are better utilized, and ultimately can deliver more revenue. Regularly evaluating the effectiveness and ROI of training is the high-water mark for successful learning and development. RTM Consulting has a proven approach to help you understand the return on your training investment by measuring and monitoring changes in your customer’s experience over time.

**ROI of Training Objectives:**

- Understand the impact and ROI of training programs
- Define an approach to collect customer experience data from your customers
- Evaluate customer experience scores against baselines over time
- Provide access to data and results in real-time through a web portal and dashboards

**Why Measure the ROI of Training?**

- Evaluate the effectiveness of your training investments
- Assess the impact of your training investment on your customers
- Assess the impact of training programs on your employees

**Logistics:**

This service is designed for large, enterprise service organizations who seek the ability to monitor the impact of training programs over time in order to recognize their return. RTMC will work with your team to understand your situation and define an approach that seamlessly “bolts on” to your RTMC training program.

**RTMC Approach to Measuring the ROI of Training:**

Building an effective method to measure the ROI of training requires thoughtful planning to select the right ways to consistently collect data that accurately reflects skills-related performance improvements leading to a better customer experience. Our team of experts will help you determine which data collection methods are right for your organization, including:

- Telephone interviews, conducted by tenured and native language speaking representatives
- Web-based surveys allowing the use of images and the flexibility to branch questions
- IVR (Interactive Voice Recognition) for immediate customer responses following an event
- Hybrid Surveys that blends both phone and web collection methods to achieve the highest level of response rates

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The workshops and training are only the beginning. RTM Consulting is the market leader in innovative and unique Resource Management, Project, Program and Knowledge Management and Business Optimization Services for Professional, Consulting, Shared Services, Support/Field Services and Education Services Organizations. Building effective services capabilities will mean the difference between success and failure for many companies. RTM Consulting can help assess your situation, build a blueprint for success and expedite needed business transformation to produce the results you want.

Contact an RTM Consulting Training Expert Today:

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RTM Consulting provides strategic and operational advisory services to help technology companies and other industries to assist them in increasing revenues and growing margins by leveraging consulting, professional, and support/field services more effectively. Specializing in Resource Management, Project, Portfolio and Knowledge Management and Services Business Optimization, RTM Consulting helps IT hardware, software and support/field services organizations achieve the benefits associated with successful services portfolios. With its unique Just-in-Time Resourcing® solution and Business Acceleration Services, RTM Consulting helps large, medium and small firms move beyond theory to practical application of industry best practices and achievement of exceptional results in the shortest possible period of time.

Why RTM Consulting?

**Best Practice Application**
⇒ We specialize in best practices for PS, Consulting, Education and Support/Field Services in tech companies

**Service Innovation & Competitive Differentiation**
⇒ Our innovative frameworks and solutions are helping many companies stay at the forefront of services innovation

**Management Bandwidth**
⇒ We supplement your team to make business transformation possible while your team focuses on your clients’ needs

**Need for Speed**
⇒ You Profit from our experience - and save the hassle of trying things we already know may not work

**Time Value of Money**
⇒ RTMC accelerates your time to operational improvements and avoiding service based losses, enabling you to quickly recover the costs of engaging RTMC

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