

# 2023 TRAINING CATALOG

*Transforming Your Services Business  
and Elevating Delivery Performance*



RTMConsulting.net | 866-622-7118  
RTMC-Training@belcan.com

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We Help Services  
Organizations Get Better  
At What They Do

# RTM Consulting Training Catalog

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# 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 services professionals who have "been there, done that"
- ⇒ Our courses feature a combination of instruction and interactive discussion/exercises
- ⇒ Our trainers bring real life scenarios/examples to the training making it relevant to the audience



## Interactive Case Studies and Continuous 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
- ⇒ Our case studies are tailored to customer situations to enable students to role play and practice what they are learning in real-life scenarios
- ⇒ We also offer continuous learning sessions that allow students to report back on actual field experience at 30/60/90 day intervals after the training has been completed



## Online Test Creation and Administrative Options

Skilled trainers can help recommend, develop and administer testing in support of your particular learning needs. Our online testing capabilities allow convenient access to testing, scoring and reporting.



## 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.

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## 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



**Online:** private virtual or public virtual capabilities



**On-demand:** pre-recorded streaming video available 24x7



**Blended:** utilizing more than one delivery method (e.g. online or on-demand pre-requisite training and then an in-person class or event)



## 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.



## 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.



## Digital Credentials

RTM Consulting is proud to offer digital badges to training participants to demonstrate proof of skills and accomplishments which can be displayed on professional profiles, email signatures, and social media.

# SECTION 1

## PS UNIVERSITY

*Transform Your Services Business*







# PS University

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: Role-Specific Learner Paths

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.

## Consultant / Delivery Practitioner:

- ⇒ **PS-101:** Consulting Fundamentals
- ⇒ **PS-205:** Standard Engagement Lifecycle
- ⇒ **PS-210:** Role & Dynamics of a Consultant
- ⇒ **PS-215:** Communication Strategy & Tactics
- ⇒ **PS-301:** Practical Project Management for the Non PM
- ⇒ **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

## Project Manager:

- ⇒ **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
- ⇒ **PS-202:** Introduction to Resource Management

## Resource Manager:

- ⇒ **PS-202:** Introduction to Resource Management
- ⇒ **PS-225:** Resource Management Soft Skills
- ⇒ **PS-350:** Resource Management Certification Program (RMCP®)
- ⇒ **PS-420:** Advanced Resource Management
- ⇒ **PS-435:** Strategic Resource Management

## Delivery Manager:

- ⇒ **PS-301:** Practical Project Management for the Non PM
- ⇒ **PS-425:** The Art of Writing an SOW
- ⇒ **PS-450:** Role & Dynamics of a Delivery Manager
- ⇒ **PS-455:** Managing the Transition from IC to Delivery Manager
- ⇒ **PS-460:** Communication Strategy & Tactics
- ⇒ **PS-470:** Resource Management Fundamentals for Delivery Managers
- ⇒ **PS-475:** Delivery Management Governance

## 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
- ⇒ **PS-202:** Introduction to Resource Management

## Services Engineer:

- ⇒ **PS-101:** Consulting Fundamentals
- ⇒ **PS-205:** Standard Engagement Lifecycle
- ⇒ **PS-210:** Role & Dynamics of a Consultant
- ⇒ **PS-215:** Communication Strategy & Tactics
- ⇒ **PS-301:** Practical Project Management for the Non PM
- ⇒ **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

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## SECTION 2

# PROGRAMS AND CERTIFICATIONS

*Transform Your Services Business*





# PS-350: Resource Management Certified Professional (RMCP)<sup>®</sup> Program

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.
- Learn and practice the principles and fundamentals of global resource management which underpins RTM Consulting's Just-in-Time Resourcing<sup>®</sup> (JITR) brand of human capital management.
- Understand how JITR can alleviate the pressures services organizations face - from utilization to project performance to capacity planning.



## 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 pre-requisite study material, certification training via either a three (3) day onsite, six (6) session virtual instructor-led online program, or pre-recorded on-demand curriculum that includes practical exercises, and certification testing.



## What We Teach:

### Just-in-Time Resourcing<sup>®</sup> (JITR): Getting the Right Person in the Right Place at the Right Time

- ⇒ Characterizing Resource Supply and Demand
  - Role definition and skills management
  - Process staffing requests
  - Forecasting future needs
- ⇒ Sourcing and Developing Talent
- ⇒ Enabling / Automating RM Processes
- ⇒ Ensuring Process Governance and Compliance



## Certification Process:

### Apply for Certification / Complete Pre-Reqs

- ⇒ [Register](#) and apply online - RTMC will verify eligibility
- ⇒ Complete required pre-reading/exercises

### Attend Certification Program

- ⇒ In Person (3 days), Virtual Instructor-led Online (6 sessions), or On-demand

### Take Exam

- ⇒ Certification exam conducted at conclusion of program
- ⇒ Exam results are immediate
- ⇒ RMCP<sup>®</sup> credential and digital badge issued upon passing certification exam

### Recertification Process

- ⇒ Certification will be active for two years
- ⇒ Recertify by earning 20 Professional Certification Units (PCUs) or retaking the certification exam

\*See the [RMCP<sup>®</sup> Handbook](#) for full program details.

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# Technologist to Consulting Training Program

A lot of time, money and effort is spent training technical delivery practitioners on products and technology. But do they really know how to: effectively engage with a client; build relationships, communicate effectively, manage scope creep; effectively handle complaints and issues; and up-sell new opportunities – the soft skills every consultant needs.

This interactive training program is your turn-key solution to enhance the consultative soft skills of technologists to complement their product, business, and technical knowledge. The program includes pre-requisite study material, learning modules, interactive case studies that allow participants to practice the skills learned during training, and a series of continuous learning sessions to reinforce lessons learned throughout the program to further drive adoption – and make behavioral changes stick.

## Learning Objectives:

- Develop consultative soft skills to complement product, business, and technical knowledge.
- Accelerate development and effectiveness.
- Improve communication, both internally and externally, leading to improved client satisfaction.
- Gain insight and learnings into how to handle scope and change management challenges, risks and issues, and upsell company solutions.



## Who Should Attend:

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

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## Logistics:



This is a comprehensive training program including pre-requisite study material. Training curriculum can be delivered in a classroom or virtual interactive environment by a qualified RTM Consulting instructor. Training delivery methods can be combined to best suit the needs of the audience.



## Program Approach:

### Awareness

- ⇒ RTMC provides participants with an introduction to the program to help conceptualize elements of soft skills development prior to the start of the program.

### Enablement

- ⇒ The program features proven consulting skills development curriculum focused on the essential soft skills every consultant needs to be successful in professional services.

### Application

- ⇒ Interactive case studies, tailored to real-life client scenarios, are used to allow participants to apply and practice the skills being developed throughout the training program.

### Adoption

- ⇒ Continuous learning sessions scheduled at 30, 60, and 90 days after the completion of the training curriculum are used to enable ongoing dialog and measure the absorption of behaviors taught during the program.



# Project Management: Going From Good To Great

While most project managers have the technical project management skills to execute projects on-time, on-budget, and within the scope and quality parameters established for the engagement, truly great project managers offer a higher-level skillset. They know how to effectively engage with client stakeholders at all levels, forge long-lasting relationships, communicate effectively, manage scope creep, and professionally navigate difficult risks and issues by utilizing the soft skills every great project manager needs.

This interactive training program is your turn-key solution to elevate your project managers from good to great. The program includes pre-requisite material, learning modules, interactive case studies that allow participants to practice the skills learned during training, and a series of continuous learning sessions to reinforce lessons learned throughout the program to further drive adoption – and make behavioral changes stick.



## Learning Objectives:

- Learn key behaviors and soft skills that enable great project management.
- Improve communication, both internally and externally, leading to improved client satisfaction.
- Gain insight and learnings into how to navigate difficult scope and change management challenges, project risks, and issues.
- Enable the ability to articulate value and value proposition, as well as identify opportunities to upsell company products, services, and solutions.



## Who Should Attend:

- Project Managers
- Project Team Leads

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## Logistics:



Training curriculum can be delivered in a classroom or virtual interactive environment by a qualified RTM Consulting instructor. Training delivery methods can be combined to best suit the needs of the audience.



## Program Approach:

### Awareness

- ⇒ RTMC provides participants with an introduction to the program to help conceptualize elements of project management soft skills development prior to the start of the program.

### Enablement

- ⇒ The program features RTMC's proven [Advanced Project Management Skills Development curriculum](#), focused on the essential soft skills every project manager needs to consistently perform high value project management functions.

### Application

- ⇒ Interactive case studies, tailored to real-life client scenarios, are used to allow participants to apply and practice the skills being developed throughout the training program.

### Adoption

- ⇒ Continuous learning sessions scheduled at 30, 60, and 90 days after the completion of the training curriculum are used to enable ongoing dialog and measure the absorption of behaviors taught during the program.

## SECTION 3

# PS UNIVERSITY CURRICULUM

*Transform Your Services Business*





# PS-101: Consulting Fundamentals

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/needing a refresher on the fundamentals of effective consulting



## Logistics:



This course is available in pre-recorded e-learning modules and can also be delivered by a qualified RTM Consulting instructor in a traditional classroom or virtual environment. Time commitment can range from approximately two (2) hours to a half day.



## 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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# Advanced Consulting Skills Development

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:



This program is comprised of six (6) courses and can be customized to meet your specific needs 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 best 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





# PS-301: Practical Project Management for the Non-Project Manager

Many organizations have times where they find themselves asking delivery resources to step in and manage a project. But do those resources know how to: Define and Manage Scope, Manage Stakeholders, Identify and Mitigate Risks and Issues, Communicate with Stakeholders, and Deal with Escalations – the fundamental skills anyone playing the role of a Project Manager needs. This course is designed to provide a foundational Project Management competency for resources who are not traditional Project Managers.



## Learning Objectives:

- Introduce the field of Project Management and what it means to be a Project Manager
- Understand the difference between being part of a project team and being responsible for managing the project
- Learn key elements of project management – why they are important and how to apply them
- Learn practical techniques to help you step in and successfully manage a project



## Who Should Attend:

Service Practitioners who are:

- Principally focused on delivery of services rather than on project managing the delivery of services
- Asked to step in and manage a project (typically projects smaller in scale and scope)
- Interested in learning more about Project Management



## Logistics:



This course is available in pre-recorded e-learning modules and can also be delivered by a qualified RTM Consulting instructor in a traditional classroom or virtual environment. Time commitment can range from approximately two (2) hours to a half day when combined with an interactive case study.



## Course Highlights:

### What is Project Management?

- ⇒ What is a Project?; Why is Project Management Important?; What is a Project Manager?
- ⇒ Attributes of a Successful Project Manager; Project Team vs. Project Manager; Project Manager responsibilities

### Key Elements of Project Management

- ⇒ Initiating a Project; Defining and Managing Scope; Managing Risks and Issues
- ⇒ Stakeholder Identification and Management; Building and Managing Project Schedules; Status Reporting; Dealing with an Escalation

### Tips from the Trenches

- ⇒ Practical advice from people who have been in this position before



# Advanced Project Management Skills Development

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:



This program is comprised of four (4) courses and can be customized to meet your specific needs and budget. Time commitment can range from one (1) hour for an individual course on-demand to 2 days of content for all four (4) modules combined with case studies. Delivery methods can be combined to best 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

### **PS-330: Identifying & Capturing Value**

- ⇒ Discusses how to communicate value propositions, focusing more on outcomes
- ⇒ Teaches how to spot opportunities to “up-sell” additional company products, services, and solutions

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# PS-202: Introduction to Resource Management

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 available in pre-recorded e-learning modules and can also be delivered by a qualified RTM Consulting instructor in a traditional classroom or virtual environment. Time commitment can range from approximately two (2) hours to a half day.



## 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



# PS-225: Resource Management Soft Skills

Resource Managers are constantly being challenged to provide the right resources at the right place at the right time to maximize margins and project performance. Most organizations invest time, money and effort training RMs on resource management processes and tools. But do they really know how to: effectively communicate and build relationships with stakeholders at all organizational levels, set and manage expectations, and challenge existing ideas or push back on 'bad' behavior when necessary – the soft skills every RM needs. The Resource Management Soft Skills development program focuses on enhancing the soft skills of RMs to complement their process, business, and systems knowledge.

## Learning Objectives:

- Understand the importance of soft skills and how they can improve a Resource Managers overall effectiveness and interactions with stakeholders
- Improve the ability to build relationships with stakeholders – trusted advisor relationships
- Improve communication skills – communicating good news/bad news, tailoring our message to our audience with the right amount of detail, utilizing a call plan, demonstrating active listening, and using effective questioning techniques
- Improve the ability to identify and respond to situations in a positive manner
- Improve the ability to run more effective resource management meetings



## Who Should Attend:

- ⇒ Resource Managers
- ⇒ Resource Management Professionals
- ⇒ Workforce Management Professionals

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## Logistics:



This course is available in pre-recorded e-learning modules and can also be delivered by a qualified RTMC instructor in a traditional classroom or virtual environment. Time commitment can range from approximately four (4) hours to a full day when combined with an interactive case study.



## Course Highlights:

### Soft Skills in the RM Lifecycle

- ⇒ What are soft skills and why are they important?
- ⇒ Identify where soft skills are needed throughout the RM lifecycle and how to apply them
- ⇒ Identify what can potentially go wrong and lead to difficult situations for a resource manager

### Role and Dynamics of a Resource Manager

- ⇒ Define the role, responsibilities, and expectations of a resource manager
- ⇒ Review the characteristics of a successful RM
- ⇒ Learn the role that RMs play in employee engagement
- ⇒ Identify key Behaviors of a resource manager
- ⇒ Discuss how to become a trusted advisor

### Communication Strategy and Tactics

- ⇒ Why is effective communication important?
- ⇒ Learn communication development and delivery best practices and techniques
- ⇒ How to run more effective resource management meetings

### Navigating Difficult Situations

- ⇒ Define risks and issues and the relationship between the two
- ⇒ Identify common RM risks and issues how to communicate them internally
- ⇒ Learn how to appropriately escalate
- ⇒ Understand RM's role in change management
- ⇒ Learn techniques to push back on bad behavior, drive improvement, and handle objections



## PS-420: Advanced Resource Management

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. At the same time, reliable resource management experts who follow a proven process discipline are in short supply. As part of the RMI's Next Level Resource Management curriculum, this 6-session online course coupled with a Case Study is offered exclusively to Resource Management Certified Professionals (RMCP®s). It is designed to focus on advanced concepts of the Just-in-Time Resourcing® (JITR) components to take resource management to the next level.



### Learning Objectives:

- Further develop RMO best practices in support of improving business outcomes from resource management processes.
- Review and better understand the Just-in-Time Resourcing® (JITR) components from the RMCP® program.



### Who Should Attend:

- The Advanced Resource Management course is offered exclusively to Resource Management Certified Professionals (RMCP®s) who wish to further their knowledge of leading resource management practices.



### Logistics:



This on-demand course is comprised of 2.5 hours of pre-recorded learning modules that vary in length from 10 minutes to 50 minutes each. The course also includes a case study that takes participants approximately 90 minutes to two hours to complete. Participants have 90 days from the point of registration to complete the course. Participants who are RMCP® certified will receive 5 Professional Certification Units (PCUs) toward their RMCP® recertification for completing this course.



### Course Outline:

- ⇒ Taking the skills database to the next level
- ⇒ Operationalizing advanced forecasting capabilities
- ⇒ Utilizing third parties as part of your sourcing strategy
- ⇒ The RMO's impact on Employee Engagement
- ⇒ Strategic labor management - offshore, near shore, geo aggregation





# PS-435: Strategic Resource Management

As more companies realize resource management is the real high-water mark of peak project performance and service excellence, they are challenging their RMO to become more strategic. As part of the RMI's Next Level Resource Management curriculum, this 2-hour course is designed to educate participants on the importance of resource management to help achieve service delivery and resource management objectives. Focus will be applied toward increasing the strategic focus and improving business outcomes from the RMO and RM processes, as well as the process and technology disciplines needed to be effective at resource management.



## Learning Objectives:

- Educate company executives and senior leaders responsible for service delivery performance on the importance of resource management.
- Educate resource management leaders, as well as those who are aspiring leaders, on the strategic elements of resource management.
- Increasing strategic focus and improving business outcomes from the RMO and RM processes.
- Help your organization turn service capabilities into competitive advantage via excellence in resource management.



## Who Should Attend:

- Company executives and senior leaders responsible for service delivery performance who are looking to learn more about the importance of RM.
- RM leaders, as well as those who are aspiring leaders, in search of deeper understanding of the strategic elements of resource management.
- RMCPs® who wish to further their knowledge of resource management and earn Professional Certification Units (PCUs).



## Logistics:



This two hour on-demand course is comprised of six sections that vary in length from a few minutes to approximately 30 minutes each. Participants have 90 days from the point of registration to complete the course. Participants who are RMCP® certified will receive 4 Professional Certification Units (PCUs) toward their RMCP® recertification for completing this course.



## Course Outline:

- ⇒ Introduction to Resource Management and Just-in-Time Resourcing®
- ⇒ Pushing past the plateau to become a more strategic RMO
- ⇒ Addressing technology challenges in support of effective resource management
- ⇒ Leading and developing the best possible RMO team



# PS-425: The Art of Writing an SOW

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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## Logistics:



The course is customizable and can range from a 1/2 day (training only) to one (1) full day with the optional SOW practice workshop. The course can be classroom led or virtual interactive session. In addition to the SOW practice workshop, there is an add-on post class SOW review available. Training, workshop, and SOW review are led by a qualified RTM Consulting Instructor.



## Course Highlights:

### Statement of Work Fundamentals

- ⇒ Purpose of the SOW
- ⇒ SOW Key components
- ⇒ Scope Impact
- ⇒ Legal Perspectives

### Estimating and Pricing

- ⇒ Estimating concepts/perspectives
- ⇒ Fixed Fee vs. T&M vs. NTE (not to exceed) pricing concepts
- ⇒ Cost Plus vs. Value Based pricing concepts
- ⇒ Revenue recognition concepts

### SOW Assembly and Governance

- ⇒ Using Templates
- ⇒ SOW Development Process
- ⇒ Best Practices

### Optional Course Add-Ons

- ⇒ Workshop - review company specific SOWs, provide feedback and best practices
- ⇒ Customization – incorporate company specific SOW processes, templates and governance practices
- ⇒ SOW Review - review of actual SOW written by participants following the class, critique and specific feedback for areas to correct/review



# PS-430: Economics of Professional Services

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



## 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



# Delivery Manager Skills Development

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/needing a refresher course on delivery management



## Logistics:



This program is comprised of five (5) courses and can be customized to meet your specific needs and budget. Time commitment can range from one (1) hour for an individual course on-demand to 2 days of content for all five (5) modules combined with case studies. Delivery methods can be combined to best suit the needs of the audience.

A post course mentoring option is available - delivered remotely by RTM Consulting delivery management experts.



## Course Highlights:

- ⇒ **PS 450 – Role and Dynamics of a Delivery Manager**
- ⇒ **PS 455 – Managing the Transition from IC to Delivery Manager**
- ⇒ **PS 460 – Communication Strategy and Tactics for Delivery Managers**
- ⇒ **PS 470 – Resource Management Fundamentals for Delivery Managers**
- ⇒ **PS 475 – Delivery Management Governance**



# PS-440: Services Sales Skills Development

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

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# PS-480: Managing Difficult Project Situations

Even with the best project management discipline, Project Managers will run into difficult project situations throughout their careers where they will have to deliver bad news to a client. This course is designed to equip participants to confidently manage difficult conversations with clients in a way that minimizes harm to client relationships, team burnout, and the need for concessions, by utilizing effective tools and techniques. Participants will be challenged to contemplate the consequences of options they have considered to address difficult project situations in the past and think differently about how they will handle them in the future. In addition, participants will learn practical tips to help reduce the likelihood of difficult conversations with clients needing to happen going forward.



## Learning Objectives:

- Equip participants to confidently manage difficult conversations with clients to achieve positive results by utilizing effective tools & techniques.
- Challenge participants to contemplate the consequences of options they may have considered to address difficult project situations in the past and think differently about how they will handle them in the future
- Gain a clear understanding of what can be done to help reduce the likelihood of difficult conversations with clients needing to happen going forward



## Who Should Attend:

- This course is offered exclusively to Project Managers, Project Team Leads, and Project Coordinators who have previously completed RTMC's Advanced PM skills development program.



## Logistics:



This advanced course is available in pre-recorded e-learning modules and can also be delivered by a qualified RTM Consulting instructor in a traditional classroom or virtual environment. Time commitment can range from approximately two (2) hours to a half day when paired with an interactive case study exercise.



## Course Highlights:

- ⇒ Perspective on the importance of project management
- ⇒ Analyzing a difficult project situation
- ⇒ Tools and techniques to manage difficult project situations
- ⇒ Handling pushback and objections from the client



## Contact an RTM Consulting Training Expert

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, and Support/Field 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.

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# About RTM Consulting

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, 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