Project Management Essentials:

The Must Know Tactics for Ensuring Every Project is a Success!

Participant Project Guide

Leadership & Employee Development Workshops
Coaching/Consulting
Assessments/Diagnostics
Teambuilding/Team Development
Culture, Engagement, Retention
Talent Strategy/HR Optimization
Online Learning Development

We use data and a scientific approach
to talent optimization to help
individuals, teams, and organizations
achieve more.

Jon Zulawski, SPHR, CPTD
Executive Vice President
Aspire Talent Group

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President/Chief Talent Officer
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Project Management Defined:

The application of knowledge, skills, tools, and techniques to project activities in order to meet project requirements.

PMBOK$^®$ Guide and Standards, Project Management Institute

Projects have a beginning and an end….if it doesn't end, it isn't a "project…"

What's in it for you to be a good project manager?

- More effective at getting things done in your personal and professional life
- Improve your leadership of your department/team by applying principles for managing the work effectively
- Reduced stress on yourself and others through better planning and execution
- Gain credibility and accelerate your career by being a leader or professional who gets results

Phases of the Project Management Lifecycle:

Initiate → Plan → Execute → Monitor → Close
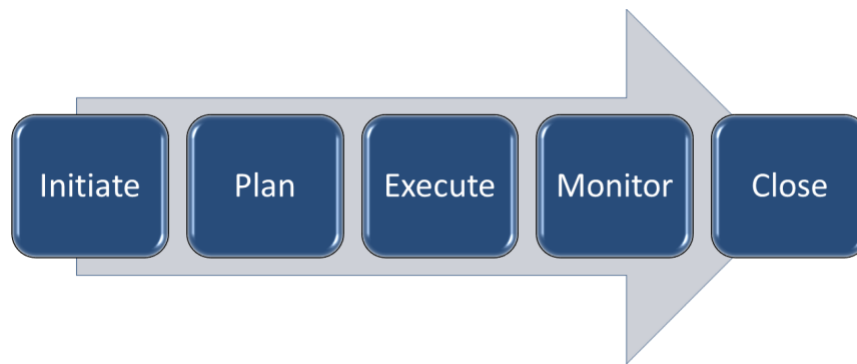
A lack of clear goals is the most common factor (37%) behind project failure.

For every 1 hour spent in planning, it saves approximately 20-100 hours in more efficient project execution.

PMI

Critical components of successful project management:

- Clear roles and expectations for project sponsor, project manager, and project team members

- Clearly defined process for managing projects

- Support tools for project sponsors, managers, and teams

- Proper resource allocation (effective project management takes time)

- Flexibility: Projects are ever-changing. Ability to quickly adapt to changing scope, timeframes, resources

Role of the Sponsor:

- Provides strategic vision and **direction** for the project, definition of desired goals/outcomes

- Provides decision-making i.e. scope, timeframes, resolution of conflicts/obstacles

- Accountability for project resources and outcomes

- Project finances: May help secure budget dollars or set budget

The Role of the Project Manager:

- Works with sponsor and project team to define project scope, requirements, and deliverables

- Develops and implements project plans

- Coordinates project activities/tasks

- Monitors and tracks milestones

- Manages, leads, and coordinates project resources

- Makes improvements, solves problems, or takes corrective action when problems arise

- Oversees project tracking and documentation

Other Important Project Roles:

- Team Members

- Subject Matter Experts (SME's)

- Stakeholders

Project Charter:

- Clearly defines why the project is being done, i.e., background, business case, expected outcomes/deliverables.

- #1 reason projects run into problems = lack of upfront definition on what is expected.

- Project Charter is presented to Sponsor for approval, becomes the foundation of the project.

- Charters remain flexible, changing documents as the project progresses. Milestones, scope, timeframes, resources often change throughout the project.

When do I need to use a Project Charter?

- Factors to consider

    - Size of project:

    - Experience level of project manager

    - Complexity/business criticality of the project

Project Charter Template:	
Project Title:	
	☐ Research/Recommendation ☐ Implementation

Project Players:

Corporate Sponsor:	
Project Manager:	
Team Players/Roles:	
Stakeholders:	
Other Key Players:	

Project Definition:

Definition of Current State:	
Background/Business Reason for Project:	
Project Purpose/Goals/Objectives	
Anticipated Project Scope/Deliverables (What "Done" Looks Like):	
Anticipated Business Impact:	

Project Schedule:

Estimated Project Launch Date:	
Project Delivery Target Date:	
Key Milestone Target Dates:	
Project Team Meeting Schedule:	

Inter-related Projects:

Anticipated Project Risks:

Project Costs:

Project Signoff/Approval Process:

Scope Changes	
Final Deliverables	

Project Communication/Training Plan:

Project Plan (also called WBS or Work Breakdown Structure):

Project Plan Template/WBS

| Project Team Name							
Key Milestones/Tasks	Task Breakdown	Owner/Primary Acctblty	Target Completion Date	Contingencies/Dependencies	Status Red/Yellow/Green	Completed date	Notes/Comments

Estimating Your Project Schedule:

- Create a project plan/ work breakdown structure

- "Chunk" the tasks into "buckets"

- Sequence the activities

- Assign resources

- Estimate duration of time needed for completion of task categories

- Find task dependencies

- Determine critical path

Benefits of Determining "The Critical Path":

- It identifies the most important tasks that need to be closely managed and those tasks that are less important but can result in competing resource conflicts

- It clearly identifies interdependent tasks and sequences needed to meet the deadline

- It helps with project monitoring by being able to compare planned with actual times

Triple Constraints: Project Management Triangle

Time/Duration

Scope/Deliverables

Resources/Costs
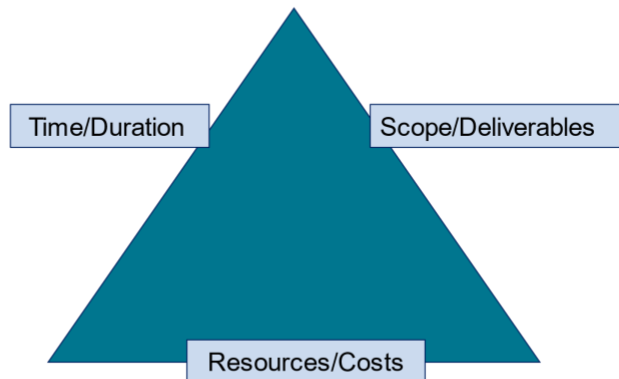
Determining a Project Budget: Costs to Consider

- Labor costs (cost centers, contract labor, etc.)

- Vendor/supplier costs

- Equipment/materials costs

- Training costs

- Legal costs

- Marketing/promotion costs

Managing Project De-Railers:

Challenge 1: Managing Time/Time Constraints

Planning/Mitigation Strategies

- Break down the work into categories and tasks on a WBS (Work Breakdown Structure or Project Plan)

- Seek input from SME's in estimating time needed to complete tasks

- Add in time for project management tracking, and "buffer time" for unanticipated interruptions

- Determine contingencies/dependencies- steps, milestones, tasks or other projects that must be complete before another step, milestone or task can start

- Determine key milestone dates to meet-catch delays quickly vs too late!

- Anticipate/determine concurrent projects or initiatives that may impact resource availability- negotiate for needed resources

- Practice good time management-stay focused on the most important items

- Send calendar invitations to project team with key milestones/dates to keep visible

- Book project work time on calendars

- Work backwards from due date!

Keeping your focus on most important project tasks/needs means practicing good time management…

	Urgent	Not Urgent
Important	**Quadrant I** Urgent & Important	**Quadrant II** Not Urgent & Important
Not Important	**Quadrant III** Urgent & Not Important	**Quadrant IV** Not Urgent & Not Important

Source: Stephen Covey, *7 Habits of Highly Effective People*

Getting Back on Track: It's never too late to apply essential project management principles

- Renegotiating scope/deliverables

- Renegotiating resources

- Renegotiating timelines/due dates
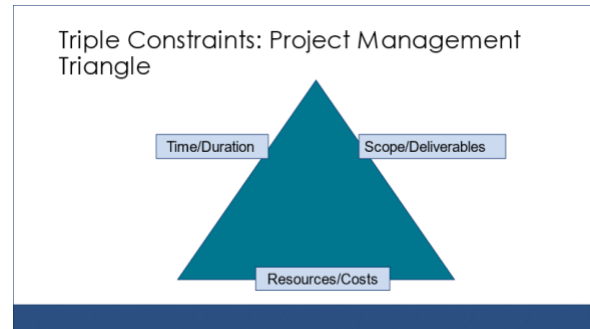
Challenge 2:   Managing Scope Creep

Planning/Mitigation strategies

- Clear upfront definition of what is in and out of scope agreed upon at front end in charter

- Process and approver defined for any changes in scope-also in charter

- Regular review of charter including discussion of scope and deliverables at project team meetings

- Regular checking question- is this in or out of scope?

- Regular check ins with project sponsor- open line of communication to escalate project issues

- Overlapping projects (portfolio management/resource management)- spot trouble early via upfront identification of key dependencies and milestones, work with sponsor on resource management

Challenge 3: Navigating Decision-Making and Approvals

Planning/Mitigation Strategies

- Define decision-makers/approvers in project charter

- Keep meeting minutes

- Maintain a decision log

Challenge 4: Managing Communication Needs

Planning/Mitigation Strategies

- Define channels and frequency of project communication on front end in charter

- Schedule regular project meetings/check ins in advance- use "huddles" where appropriate

- Agree on the set of tools everyone will use for managing the project, i.e., agendas, meeting minutes, weekly project update reports, etc.

- Make it easy i.e., set up project address group, schedule/send calendar reminders when information is needed, etc.

- Define who is responsible for project communication and tracking

- Create project information hub to house all project-related documents- use good document management practices

- Create a communication plan for the project –this can be helpful when project involves clients

Document Management Essentials for your Project:

- Central place defined for all project documents

- Set up directory and sub-folder levels and permissions

- Limit number of people who can edit project charter and WBS/project plan

- Define naming standards and versioning standards

- Label drafts and final approved versions

- Determine maintenance schedule for purging or records retention of outdated documents

Challenge 5: Managing Project Risks

Planning/Mitigation Strategies

- ■ Discuss project phases and milestones start to finish– what obstacles/risks could we run into and at what points?

- ■ How likely are they to happen?

- ■ How serious are they if they happen?

- ■ How can we mitigate them on the front end of the project?

- ■ Develop a risk management plan if necessary

Project Name:

Risk Identification & Mitigation Plan			
Potential Risk:	Likelihood of Happening L_M_H	Severity of Impact L_M_H	Potential Mitigation Strategies

Project Kickoff/Launch Meeting:

- ■ Introduce roles and responsibilities of team members

- ■ Review project charter, i.e., background, purpose, goals, outcomes, deliverables,

- ■ Discuss timeline/approach

- ■ Set schedule for ongoing project team meetings

- ■ Create decision-log, meeting minutes template for team

- ■ Determine common place to share project-related documents, agree to document management standards

- ■ Agree on set of ground rules for team meetings

Establish Ground Rules or "Guiding Principles:"

Examples:

- We will begin and end on time

- We will come to each meeting prepared by completing any pre-work and reviewing/bringing the agenda and related documents

- We will listen to each other's thoughts and opinions

- We will fully engage and be open to new ideas

- We will be honest, authentic, and respectful in our communications

- We will stay focused on the agenda items

- If you oppose, you must propose

- We will limit the use of electronic devices except for notetaking or meeting-related needs only

- We will return from meeting breaks on time

- We will speak up respectfully if we disagree-silence will be interpreted as agreement

Assign Meeting Roles:

- **Leader:**

    o Prepares agenda, moves agenda, elicits participation

- **Recorder:**

    o Meeting documentation, decisions, action items

- **Timekeeper:**

    o Verbally announces amount of time remaining and when time is up

- **Facilitator:**

    o Helps to manage group process, to balance participation, to keep group focused on objectives

TIP! Use a "parking Lot" to avoid those inevitable meeting "rabbit holes…"

Specify how attendees should prepare for Project Meetings

- Will they have a specific role?

- Do they own any agenda items and are they clear on what to prepare?

- Will they be asked to share/present information?

- Will they need to read or review anything prior to the meeting

- Is there other data or information they are expected to bring

Implementation: Running the Project

During the project, the project manager is:

- Conducting ongoing project team meetings and check ins

- Implementing your plan to achieve the project goals/deliverables

- Monitoring any key dependencies/related projects

- Navigating barriers, obstacles, and risks

- Managing scope and resources

- Monitoring, measuring, and reporting on progress

- Keeping project charter and project plan current

- Negotiating any scope/deliverables/resource changes with appropriate parties

- Managing people needs, i.e., navigating team dynamics

Creating a Constructive Team Culture:

Culture is Shared Beliefs, Norms, and Expectations
Cultural elements of team dynamics that shape how team members believe they should behave, the "unspoken rules" for how things work around here

The Importance of Trust:

Teams with an absence of trust…

- Hesitate to ask for help from each other

- Hesitate to offer help outside their own areas of responsibility.

- Hide their mistakes and weaknesses from each other

- Fail to recognize and leverage each other's skills, abilities, and experiences.

- Waste time and energy "playing it safe" and attempting to "look good, look smart"

- Withhold feedback and miss opportunities to learn and improve

Teams that trust…

- Readily ask for and offer help to each other

- Admit weaknesses and mistakes.

- Are open to questions and input from others

- Give one another the benefit of the doubt before arriving at a negative conclusion.

- Take risks in offering feedback—operate with authenticity

- Recognize and appreciate other skills, abilities, and experiences without feeling competitive.

- Focus time and energy on important issues, not politics.

- Offer and accept apologies without hesitation—extend grace.

- Look forward to meetings and other opportunities to work as a group.

A Moment of Self Reflection:

Team Dynamic/Culture

- *How does it feel now?*

- *How do you want it to feel?*

My Relationships

- *Where are they now?*

- *Where do I want them to be?*

Accountability on a Project Team:

Teams that avoid accountability…

- ■ Often miss deadlines and key deliverables—"not my job".

- ■ Tend to finger point and blame when work doesn't get done

- ■ Create resentment among team members who have different standards of performance.

- ■ Encourage mediocrity, doing the minimum.

- ■ Place an undue burden on the team leader as the sole source of discipline.

A team that holds one another accountable:

- ■ Has clear ownership of tasks and deliverables and identifies dropped balls quickly

- ■ Doesn't blame, instead quickly assesses the situation and has open discussion about how to get back on track

- ■ Establishes respect among team members who are held to the same high standards.

- ■ Ensures that poor performers feel pressure to improve.

- ■ Leverages peers/each other to drive performance vs. full burden of performance standards set by team leader

Building an Accountable Team:

- This is what I need from you, and this is why it matters

- There are the parameters and the limitations

- This is how we'll know if you are successful

- This is what we're agreeing to

Holding team members accountable may mean having difficult conversations…

- I need to be candid with who about what?

- What is the specific change I need to happen?   What is the outcome I need from the conversation?

- The facts I currently have are:

- The facts I need to get are:

- The interpretations I am making are:

- The reactions I am expecting from the other person are:

- What are my personal communication style tendencies? How will they help/hinder me in the difficult conversation I need to have? How can I leverage, manage, and/or mitigate them?

- What are my mental models around this situation, i.e., the "shoulds and shouldn'ts," opinions, biases, and perspectives I'm bringing to the situation?

- The things that could trigger high emotion in me in this conversation are:

- I will manage any triggers by:

- If I were in the other parties' shoes, what would their perspective/opinion be?

- What would their needs be in this conversation?

- What do I know about the other parties' communication style preferences, i.e., details and context, short but direct, etc.?

- What is the current state of trust in the relationship?

- What are the current power dynamics to consider?

- How can I create feelings of trust, credibility, and safety in my approach?

TEMPLATE: Planning for a Difficult Conversation

I need to be candid with who about what?

What is the specific change I need to happen? What is the outcome I need from the conversation?

The facts I currently have are:

The facts I need to get are:

The interpretations I am making are (or stories I'm telling myself about the situation, i.e. ladder of inference):

The reactions I am expecting from the other person are:

What are my personal communication style tendencies? How will they help/hinder me in the difficult conversation I need to have? How can I leverage, manage, and/or mitigate them?

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Asking permission to have the conversation

- o *Example: "I have something important I'd like to talk with you about. Is now a good time?"*

Common Reactions to Receiving Difficult Feedback

- Hurt

- Denial

- Defensiveness and justification for our actions

- Attacking the messenger

- Explanations or rationalizations

- Criticizing the manner of feedback delivery

Common Mistakes When Delivering Feedback:

- The feedback judges the individual person vs. their actions

- The feedback "psychoanalyzes" the motives behind behavior

- The feedback is too vague and unspecific to know what to do with it

- Negative feedback gets "sugarcoated" and the real message is lost or unclear

- The feedback is exaggerated with generalities.

- The feedback goes on too long

How to Have a Difficult Conversation:

SBID +

Declare my Good Intent

Situation

Behavior

Impact

Desire

Re-declare My Good Intent

Invite their perspective

Begin with an opening high-level purpose and intent statement

- "I'd like to talk with you about our project team meetings so we can make sure they are as effective as possible (or get on the same page, come to agreement on next steps, figure out the best way forward, etc.) My intent is to ensure we are working together as effectively as possible and getting all possible great ideas on the table."

Describe the situation using facts (vs your interpretations)

- "As you know, our project team has weekly meetings and we invite all the stakeholders so we can gather input from all the areas involved."

Describe the behavior or issue

- "I've noticed it seems like you had your phone out during the last meeting, and we didn't hear your input on the project."

State the impact/consequences

- "It is an important project so I worry we may miss something if we don't get your thoughts as we move forward."

State what you want to see more of expressing confidence in them (vs focusing only on what you want the person to stop)

- "I know you have some great experience and valuable input, so I feel you have a lot of offer this team. I'd love to see you participate with us and contribute your ideas when we discuss options and make decisions during each meeting."

Restate overall intent

- "Again, I just want to reiterate that my intent is to make sure we're working together as effectively as possible and getting all perspectives on the table to ensure we're considering everyone's needs."

Invite their perspective, ask questions

- "I'd love to hear your thoughts on this."

TEMPLATE: Planning What to Say to Address a Difficult Conversation-Behavioral Issue

Begin with an opening high-level purpose and intent statement

Describe the situation using facts (vs your interpretations)

Describe the behavior or issue

State the impact/consequences

State what you want to see more of expressing confidence in them (vs focusing only on what you want the person to stop)

Restate overall intent

Invite their perspective, ask questions

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Closing a Project:

- Formal approval/signoff of project deliverables

- Transition the solution to support, i.e., determine maintenance/sustainability plan

- Determine measurement/tracking/reporting plan to determine project benefits achieved

- Celebrate with project team!

- Conduct project closure review and evaluation

Post Project Review & Evaluation:

- What lessons were learned during this project that should be captured and applied to future projects?

- What worked, what did we do well?

- What didn't work, what could we have done differently?

- What changes would we make if we conduct a similar project in the future?

- What lessons learned could be shared with other project teams?
- Reflect on your personal leadership lessons learned –SWOT Analysis

Summary: Working a Project Start to Finish:

BEFORE:

- With your sponsor, clearly define project purpose, goals and needed outcomes
- Agree on "what done looks like," i.e., what is in vs. out of scope, what the final deliverables will be
- Determine project timeline, budget, and resources needed
- Develop project charter

DURING:

- Conduct an effective kickoff/launch meeting
- Set up ongoing project meetings, assign roles and responsibilities, and create a place for project documents to be managed.
- Use a project plan to monitor progress, track tasks, due dates, and owners
- Assess project risks, log decisions
- Address challenges as they arise, i.e., scope creep, resource allocation, timeline changes, i.e., adjusting for the triple constraints
- Determine communication plan, change management plan, and/or training plan as applicable

AFTER

- Gain Sponsor signoff of project completion, measures of success
- Transition the project to maintenance/support status
- Celebrate with the project team
- Conduct a project closure review and evaluation for continuous improvement
- Reflect on your personal leadership lessons learned—i.e., SWOT Analysis for continued growth and development

SWOT Analysis: My Project Leadership

Strengths: What went well? Where was I most effective in leading the project and project team?	Weaknesses: What might have gone better? Where was I least effective in leading the project and project team?
Opportunities: Where/what/how could I improve my project management or team management skills going forward? What steps will I take? What will I do differently next time?	**Threats:** What are the implications/how will this be a barrier to my success if I don't continue to build these skills and make improvements?

Additional resources: www.aspiretalentgroup.com

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Identifying Leadership Lessons Learned- Conduct a Personal SWOT Analysis:

Additional Resources to Advance your Project Management Learning:

- Fundamentals of Project Management, by Joseph Heagney

- Managing Projects Large and Small: The Fundamental Skills to Deliver on Budget and on Time, Harvard Business Essentials

- Project Management for The Unofficial Project Manager, Franklin Covey/Kory Kogon

Tools & Templates!

Access all tools & templates online here:

Resource Page Just for You!

https://www.aspiretalentgroup.com/aspire-sbdc-fall21-pm/

Key Sponsor/Stakeholder Project Definition Questions

How does this project support the mission of the department, division, and/or company?

What problems/pain points do you see this project solving?

In what ways will this project solve the problems?

Which of these problems is the most important to solve?

What happens if this project is not done?

What will be different after this project is completed?

What specifically do you expect the project team to create or implement to consider the project completed?

If the project team could accomplish just one thing, what would that be?

What are the major risks to the project's success?

What suggestions do you have regarding how the project team should approach its job?

What concerns you most about this project?

If the project team could accomplish just one thing, what would that be?

What does "DONE" look like?

How will you measure success for the project?

When this project is officially completed, what will make you say: "This project was right on target?"

OTHER NOTES:

Project Charter Template

Project Title:	
	Research ☐ Implementation ☐

Project Players:

Corporate Sponsor:	
Project Manager:	
Team Players/Roles:	
Stakeholders:	
Other Key Players:	

Project Definition:

Definition of Current State:	
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Project Goals/Objectives	
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Project Schedule:

Estimated Project Launch Date:	
Project Delivery Target Date:	
Key Milestone Target Dates:	
Project Team Meeting Schedule:	

Inter-related Projects:

Contingencies/Dependencies:

Project Budget/Costs:

Project Signoff/Approval Process:

Scope Changes	
Final Deliverables	

Project Communication/Training Plan:

Project Plan: Work Breakdown Structure (WBS)

Project Name

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Key Milestones/Tasks	Task Breakdown	Owner/Primary Accountability	Target Completion Date	Contingencies/Dependencies	Status Red/Yellow/Green	Completed Date	Notes/Comments

Project Name:

Decision Log			
Date	Decision Made	Background:	Approver/Status

Project Name:

Risk Identification & Mitigation Plan			
Potential Risk:	Likelihood of Happening L_M_H	Severity of Impact L_M_H	Potential Mitigation Strategies

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Restate overall intent

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Other Helpful Links

Please see our website at aspiretalentgroup.com or links below for additional services:

Leadership Development Training Sessions	Training & Educational Courses - Aspire Talent Group
Employee Development Training Sessions	Employee Development & Workshops - Aspire Talent Group
Assessments, Surveys, and Diagnostic Tools	Assessments, Surveys, & Diagnostics - Aspire Talent Group
Teambuilding/Team Development	Team Development & Team Building - Aspire Talent Group
HR Services	HR Services - Aspire Talent Group
Talent Strategy & Optimization	Talent Strategy & Optimization - Aspire Talent Group
Online Learning & LMS Services	Online Learning & LMS Services - Aspire Talent Group
Speaking & Keynotes	Speaking & Keynotes - Aspire Talent Group
Coaching	Coaching - Aspire Talent Group

Partner & Consultant Bios

Tracy Nelson, MSOD, SPHR, CPLP

Tracy Nelson, MSOD, SPHR, CPTD, is a senior level human resources, organizational development, and learning/talent development leader with over 30 years of business experience in a variety of industries including healthcare, financial services, insurance, hospitality, manufacturing, and non-profit. She has served as Vice President of Talent Solutions for the UW-Madison Wisconsin School of Business Center for Professional & Executive Development as well as adjunct faculty at the Wisconsin School of Business. She served over 10 years on the Board of Directors of the Madison Area Chapter of the Association for Talent Development, including a year as President, and is currently a Vice President on the Executive Board of Directors for Greater Madison Society of Human Resources Management.

She was one of the first in the nation to earn the Certified Professional in Learning & Performance/Certified Professional in Talent Development designation through the Association for Talent Development. While serving as Vice President of Organizational Development for a Madison-based financial institution, Tracy's learning team twice earned the international ATD BEST Award. The BEST Award is based on benchmarking organizations worldwide recognizing those who leverage their talent development function to drive organizational strategic initiatives and demonstrate efficiency of learning delivery and measurable business impact. Tracy was also twice featured in national Training & Development magazine for her programs.

Tracy's experience and credentials include:

- SPHR – Certified Senior Professional in Human Resources, HRCI
- CPTD – Certified Professional in Talent Development, ATD
- Prosci Certified Change Management Leader
- DDI Certified Leadership Development Trainer
- Executive Board of Directors, VP of Community Outreach, Greater Madison SHRM
- President & Board of Directors VP, Association for Talent Development-Madison Area Chapter
- Adjunct Faculty & Executive in Residence, Wisconsin School of Business, UW Madison, Strategic Human Resources & Management
- Human Capital Institute Certificate – Strategic Workforce Planning
- Certified CCL (Center for Creative Leadership) 360 Assessor/Coach
- Certified DISC Profile Assessor/Coach
- Certified in Big 5 Psychometric Testing
- Certified Human Synergistics Assessor/Consultant – Culture, Leadership, & Teams
- Certified Educator for Covey Leading at the Speed of Trust program
- Certified TRP (Totally Responsible Person) Educator
- Featured in ATD National Training & Development Magazine, Oct. 2011 & Oct. 2012

- 2005, 2008, 2012 National ELLY Award winner, Excellence in Credit Union Education
- 2015 Top 10 Finalist "Best in Class" Leadership 500 National HR Award for Excellence in Leadership Development Programs
- Frequent state, national and international conference speaker

Tracy is currently a member of:
- National & Madison Area Chapter of the Association for Talent Development
- National & Greater Madison Society of Human Resource Management
- Madison Organizational Development Group (MOD Squad)
- Chair, Madison Leadership Roundtable
- Human Synergistics National Advisory Board

Tracy's Areas of Expertise Include:
- Human Resources Consulting
- Management & Leadership Development
- New and Emerging Leader Programs
- Employee Engagement & Retention
- Employee Experience/Culture
- Change Management
- Coaching & Maximizing Performance
- Training Instructional Design & Development
- Keynote Speaking and Training Facilitation
- Assessments including Culture, Engagement, Leadership 360's, and Personal Styles
- Presentation Skills Coaching/Group and Team Meeting Facilitation
- Project Management
- Internal Service and Teambuilding
- Strategic Planning/Workforce Planning
- Employee Relations/Performance Management
- Talent Development, Succession Planning, Career Development
- Recruiting, Screening, Hiring, and New Employee Onboarding
- Individual, Team, & Organizational Assessments
- Managing Conflict, Handling Difficult Conversations
- Communication/Interpersonal Skills/Emotional Intelligence

Jon Zulawski, MBA, SPHR, CPTD

Jon Zulawski, MBA, SPHR, CPTD, has over 15 years of experience driving learner engagement by leading the development of learning programs and enhancing the effectiveness of the learning function at organizations both large and small across a variety of industries.

As a talent solutions leader in executive education, Jon drove the development of new product and service offerings aligned with client and market needs. Jon has led leadership and organizational development, employee development, learning technologies, and patient, customer, and employee experience functions at health care, financial, insurance, and benefit administration companies and organizations.

Jon's credentials include the following:

- SPHR – Certified Senior Professional in Human Resources, HRCI
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- DDI Certified Leadership Development Trainer
- MBTI Certified Practitioner
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- Certified Educator for Covey Leading at the Speed of Trust program
- Certified Educator for Vital Smarts Crucial Conversations program
- Certified TRP (Totally Responsible Person) Educator

Jon is currently a member of:

- National Association for Talent Development (ATD)
- Madison, WI Chapter of the Association for Talent Development (ATD MAC)
- Northeast Florida Chapter of the Association for Talent Development (ATD NEFL)
- National Society for Human Resources (SHRM)
- Madison, WI Chapter of the Society of Human Resource Management (GMA SHRM)
- Jacksonville, FL Chapter of the Society for Human Resources (SHRM Jacksonville)