Our name is our mission:

Transforming
Business
Operations

Training Business Line

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PROJECT MANAGEMENT

change   management
BUSINESS   process
TRANSFORMATION
strategy   new
        vision
customer   success

TRAINING

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About TBO

Why we come to work everyday:

To bring together great people, who blend tested strategies with innovation to enable customer success

How do we do it:

We develop approaches that are customized to our clients. We are not trapped by standard methodologies or frameworks. We can do this because, we use only experienced consultants who know the tools and how they fit different environments

What we deliver:

We measurably improve our client's chances of executing a major organizational change that delivers on expectations set in the business case.

Bottom Line:

In partnership with our clients we deliver business critical success. We have been able to achieve these results in an environment where two thirds of projects are challenged or outright failures. The latest studies indicate this failure rate is increasing in spite of the widespread use of standardized change and project management methodologies

Delivery Approaches

- **Training** – We start with a baseline of standard materials covering organization change & project management, leadership skills, strategy & culture, business analytics, and team building. We customize to meet your specific needs. We can deliver in a classroom, through virtual or self paced learning, or in an experiential setting. Our goal is to give your teams the prerequisites for success

- **Coaching** – We dig in and understand your situation, culture, and change maturity. We then act as mentors and coaches to guide your teams to success by effectively applying in-person and long-distance coaching both on a scheduled basis and when the inevitable issue arise we will be there with advice and options needed for the greatest chance at success

- **Staff Augmentation** - Many of our clients prefer to staff and lead their critical change initiatives, however they lack one or more of the skills required. We offer experienced consultants who can meet these needs. With broad backgrounds they can adapt to your way of doing things, and provide the necessary success **Turnkey Delivery** - We will provide a highly qualified team that matches your requirements. They will work under your overall direction and strategic decision making. To ensure that the change is yours, we ask for active involvement of your leadership team, subject matter experts , and organizational touchpoints throughout the change process.

Specialties

- **Project Manager –** Overall responsibility for delivery of the clients business case. Accountable for delivery at a mutually agreed upon time and at a cost that permits achievement of the desired return on investment. More senior project managers manage multiple projects or program management offices

- **Organization Change Manager –** Responsible for all aspects of change management execution including communications planning, gap analysis, stakeholder engagement, training planning, and resistance management

- **Business Analyst –** Responsible for understanding the clients need at a detailed level. Translates needs into specific requirements that are measureable and verifiable

Specialties (Continued)

- **Process Analyst –** Analyzes client business process for effectiveness and efficiency. Applies various techniques including lean and six sigma to develop to-be process proposals and strategies to implement them
- **Project Communications -** Responsible for communication plan detail development and execution. Develops and delivers and prepares other to deliver messages tied to successful project execution. Uses verbal, written, and social media platforms
- **Trainer –** Plans, develops and delivers project-specific and professional development training. May be a career trainer/educator or a specialist from one of our other specialties with significant training experience

Training

- **Training Domains**
  - Organization Change Management
  - Project Management*
  - Leadership Skills
  - Strategy & Culture
  - Business Analytics
  - Team Building
- **Content**
  - Our training classes consist of materials developed through many years of hands on operational and consulting experience as well as the latest thinking coming out of academics and management literature
  - The classes shown can be delivered as-is or customized to the specific needs of the client

*Classes are not intended for PMP exam Prep. They may be used towards PMI continuing education requirements

Organization Change Management

- **14 Steps to Change by Design not Default**– *This two-day workshop allows students to evaluate barriers to change, study different forms of change and allow them to apply 14 steps to implement an organizational process for change*
- **Change Management for the Executive Team** – *This half-day class focuses on the justification for including organization change management in a transformation project, and common principles and structure regardless of methodology or project type including significant deliverables and their purpose*
- **Change Management for Stakeholders**– *This one-day class explains change management from the perspective of those most significantly impacted by the change*

- **Change Management for Team Members** – *This five-day class focuses on the components of a change project as outlined in Change Activation Toolkit produce by Better Business Learning. Team members will develop an understanding of change activities and the basics of tools that may be applied*
- **Advanced Change Management for Change Leaders -** *This three-day advanced course builds on the Team Members Course by introducing advanced tools and methods described in the Change Management Toolkit 3rd Edition, Gary Skarke et al as well as concepts on how to build the right customized approach as described in Focusing Change to Win, Nick Anderson et al*

Project Management*

- **PM Overview** – *This one-day course provides a thorough understanding of Project Management Methodology, Project Lifecycle, and Process Phases*
- **First Time PM** – *This three-day course provides a thorough understanding and practical application of all aspects of the project planning process*
- **PM for Team Members** - *This two-day course is designed for project team members to gain an understanding of project management concepts, processes, and methodology essential to effective team communication during project development & delivery*
- **Introduction to Quality and Risk Management -** *This two-day course designed for participants to gain a thorough understanding of Risk Management and quality planning.*
- **Introduction to Schedule & Cost Control** – *This four-day course is designed to give early career project manager an in-depth understanding of how to manage and control cost and schedule*

- **Advanced Schedule & Cost Control -** *This four-day course is designed to give mid-career project managers the skills and tools necessary to manage cost and schedule in larger and hi-risk projects*

Strategy & Culture

- **Cultural Transformation**– *This five-day interactive workshop guides attendees through the process of identifying key issues that plague organizational culture. Students will learn techniques for radical improvement that not only improve moral but increase the bottom line*
- **Soar with Strategic Excellence** – *This two-day class focuses on the critical factors required to develop and communicate strategy as well as cultural impediments to success*
- **Combat the Enemies of Excellence** – *This three-day class allows students to focus on their organization's mission and the subsequent translation of that mission to individual roles. Participants in this interactive seminar will outline six steps that are unique to them in regard to defining and determining the need for change; creating a radical vision; and developing, executing, and sustaining a plan*
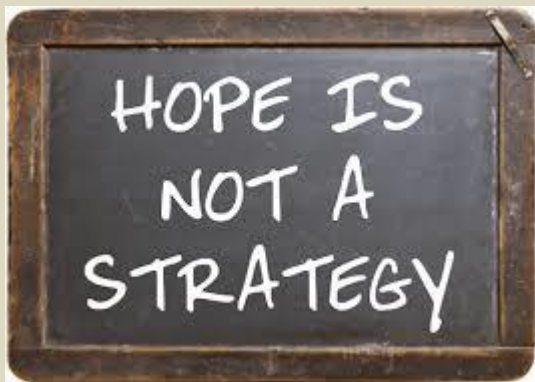
Leadership Skills

- **Bulletproof Presentations** – *This one-day course provides a thorough understanding of how to prepare and present effective presentations*

- **Managing Resistance** – *This one day class introduces Napoleon's thirds (The Willing, Fence Sitters, and Resistors) and provides strategies for effectively dealing with each group with emphasis on resistance and its various forms*
- **The Cure for Conflict** – *This one-day teaches students how one's natural conflict-handling style can be refined and improved to engender a workplace culture that will become better equipped to handle conflict and accomplish organizational goals*
- **Connect Instead of Communicate** – *This two-day class will have students engage in exercises and discussion on practical steps for connecting with listeners from a high level as well as interpersonally so that words stick and messages are understood*
- **Time Management** – *This one-day course covers the importance of time management. The student will receive an introduction to scheduling, the concepts of flow and purposefulness as well as develop an understanding of how to pull together their personal plan*
- **Effective Meetings & Communication** – *This one day course covers oral and written communication as well as how Social and Text messaging have become part of business communications. The second half of the class focuses on structuring effective meetings including dealing with conflict*

Business Analytics

- **Business Analytics and Business Intelligence** *– This twelve-hour course introduces issues related to how data can be effectively used to facilitate decision making within the organization. Individuals will gain an overall understanding of Business Intelligence topics and the different components of BI. In addition, they will receive a high-level introduction to different Data Analytics techniques such as Market Basket Analysis, Decision Trees, Neural Networks, Cluster Analysis, and Text and Web Mining*
- **Data Analytics & Data Mining** *– This three-day class* deals with the problem of extracting information from large databases and designing data-based decision support systems. The extracted knowledge is subsequently used to support human decision-making in the areas of summarization, prediction, and the explanation of observed phenomena (e.g. patterns, trends, and customer behavior). Individuals enrolled in this course will have the opportunity to analyze real-world datasets using industry standard tools such as SPSS and SAS Enterprise Miner

Team Building

- **Managing Teams for Success** *– In This four-day In this four-day class, leaders will be taught how to plan, develop, and align their teams for success. Topics covered include how to establish a supportive interview atmosphere in which candidates share information readily and how to coach in order to inspire achievement, inspire victory, and garner respect. This course will focus on the role of the leader in aligning people, versus simply organizing and staffing business units. The session deals with communicating the vision to people in ways that that increase their commitment to it.*
- **Build an Emotionally Intelligent Team** *– In this two-day class we focus on Emotional the foundational building block for developing human capital that translates to increasing the bottom line. Through assessment, instruction and exercises, participants will be equipped to form an emotionally intelligent organization in which each employee can manage themselves effectively while taking responsibility to contribute their best to the organization.*

Vic Rodriguez, PMP

Vic Rodriguez is a senior consultant with over 30 years' experience in professional development and education management, leading organizational change, human resource management, team development, setting strategic direction, developing concepts from feasibility through implementation, and structuring organization alignment efforts to realize maximum efficiency.

As TBO's lead developer, Vic specializes in instructional systems design, curriculum development and delivery of project management and other soft skills training, helping organizations define their operational roles and goals while providing the framework and structure to enable the organization to plot a clear path to success. He designs, develops and delivers curriculum and training in support of multiple clients in myriad business sectors. These multifaceted functions involve career development management for client personnel in need of recurring and advanced skills training. Vic's training is conducted worldwide and is attended by participants representing global industry leaders.

Vic previously served as Director of Operations for entry-level management training accredited by the Southern Association of Schools and Colleges, where he managed and facilitated professional leadership training programs for military members and Department of Defense civilian employees, graduating over 40,000 candidates per year.

Vic is a graduate of Wayland Baptist University with a BA in Education, and he has received his Project Management Professional (PMP) Certification from the Project Management Institute.

David Vequist, Ph.D.

David Vequist is a fully tenured professor in the H-E-B School of Business & Administration and chair of the Management Discipline; he is also a researcher, consultant, futurist, and published author with expertise in Education Management. His specialties are Training Technologies; Medical Tourism, Management of Technology; Business Strategy; Project Management; Competency Modeling; CRM and Data Mining / Data Warehousing; Knowledge Management; Organization Behavior / Organizational Development / Organizational Effectiveness; Quality Systems and Process Improvement; Human Resources and HRIS systems; and Change Management.

David is the Founder and Director of the Center for Medical Tourism Research, the first academic center in the world to study the growing industry of Medical Tourism. In addition, he has developed science-based, web-delivered, leadership development solutions for customers worldwide. As Lead Developer for the Faculty EDGE program, a future-forward, agile, and scalable tool for developing student leaders at universities, he writes the most innovative and cost effective competency-based educational tool for developing business students.

David has previously held positions as the Vice President of Human Resources with the Methodist Healthcare System, and has served myriad companies as a management consultant.

David holds a M.S./Ph.D. in Industrial/Organizational Psychology from the University of Tulsa, an M.B.A. in Business Administration and Management from the University of Texas at San Antonio, and a B.S. in I/O Psychology/Management from Northern Arizona University.

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