

PMDoS 2022

CONSULTANT ONBOARDING PACK



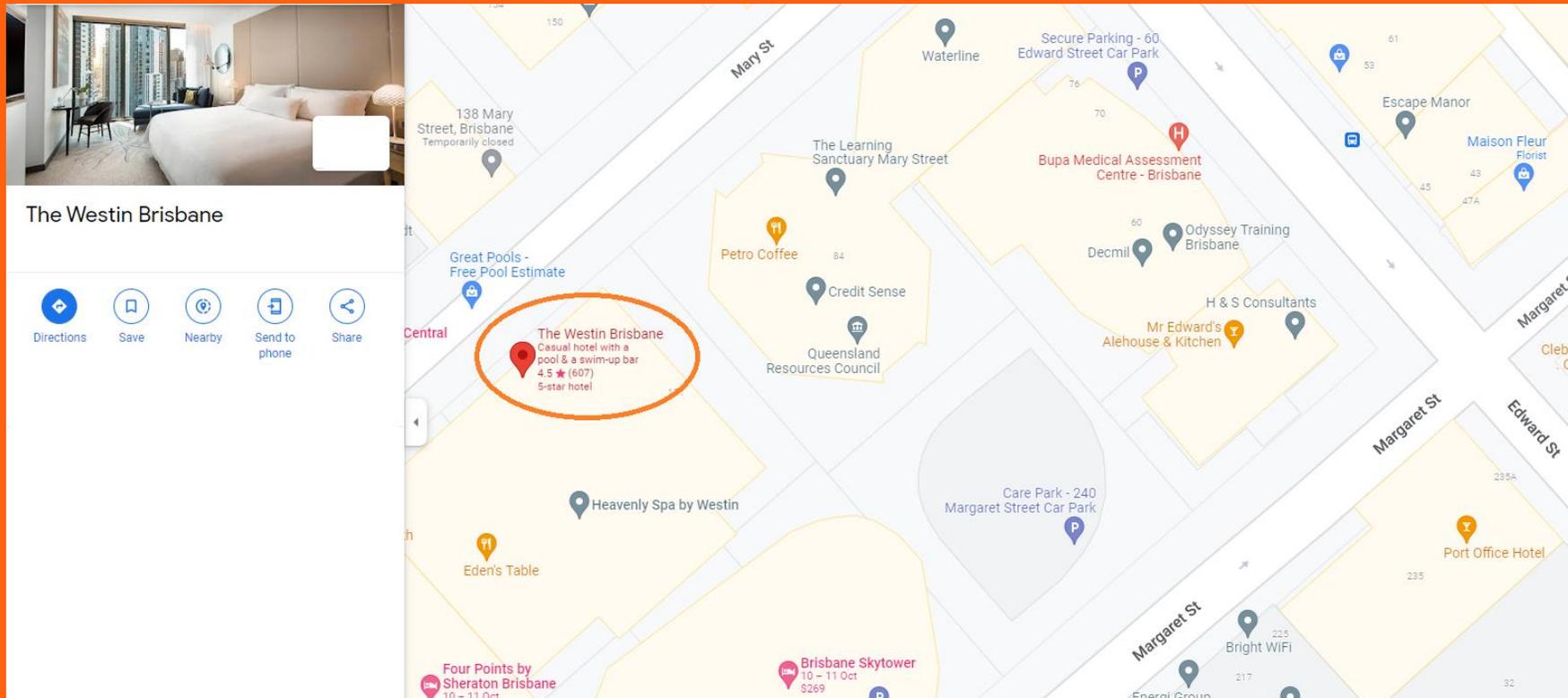
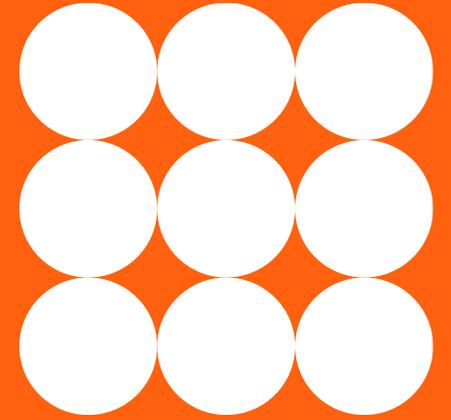
What is the PMDoS?

- **PMDoS** is the Project Management Day of Service.
- The **PMDoS** is a concept which originated in the U.S. with the participation of multiple PMI chapters. From there, an organisation named Project Management for Change was born, and now the **PMDoS** is being offered across the U.S. and Internationally.
- This years **PMDoS** in Brisbane will be the sixth offering of its kind and we are looking to involve more charities than ever!
- At our 2021 in-person event we hosted 39 Charity Initiatives and over 120 Consultants!
- Click on [this link](#) for more information on PMDoS.

When and Where is the PMDoS?

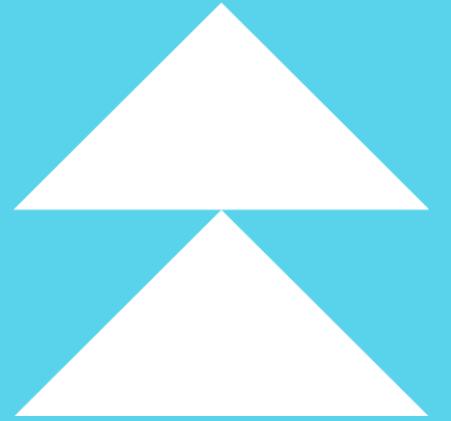
WHEN : Thursday, 27th October 2022

WHERE: The Westin Brisbane, 111 Mary Street, Brisbane



How Do I Get There?

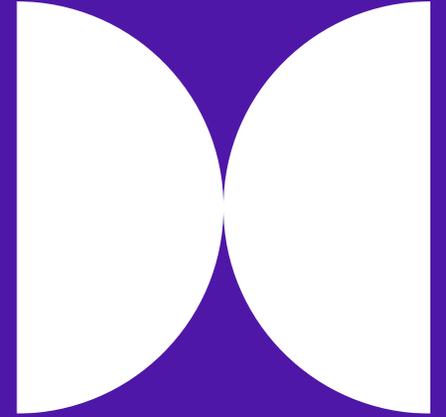
- **Trains: Central Station**
- **Bus - The Queen Street Bus Station**
- **City Cats - Eagle Street Pier Terminal**
- **Taxi - Taxi ranks near The Westin Brisbane**
- **Parking - Secure Parking or Wilson Parking**
 - Please check for rates and availability in advance



What Happens On the day?

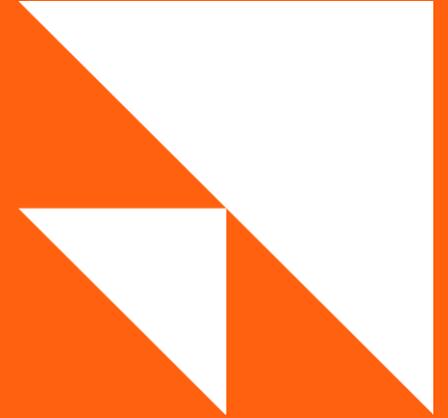
- On the day, a team of consultants will liaise with the Charities/NFPs to provide a solution to their problems or initiatives.
- By the end of the event the Charities/NFPs will have a clear understanding of the problem or initiative and a practical plan to address it. They will also have expert consulting from seasoned consultants and a roadmap on how to proceed with implementing the solution.
- The roadmap for each charity/NFP will be different; some may require a project plan, others may require a communication plan, others still may require a business case, or even a new product.

Click on this video link [What to expect on the day?](#)



Charities/ NFPs

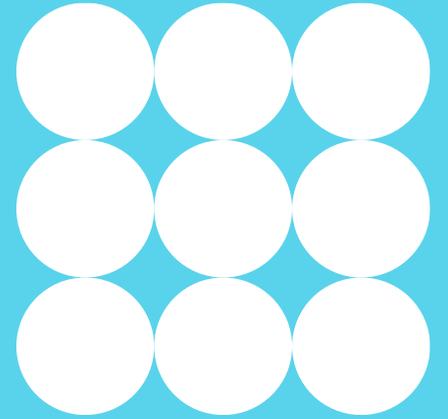
- Charities/NFPs differ greatly from one another – budget, size, sophistication, etc. Don't assume if you know one charity that you know them all.
- Charities/NFPs have limited capacity and budget. Please be mindful of this when suggesting a solution.
- Be mindful that the charity/NFP representatives may need to gain buy-in with the right internal stakeholders. These people may not be in attendance on the day.



Charities/ NFPs

What are Initiative Statements?

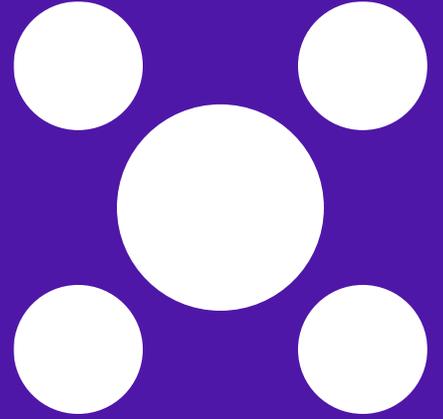
- Initiative Statements outline what the charity/NFP is looking for help with.
- They are completed by the charity/NFP prior to the event.
- Initiative Statements will be provided to consultants prior to the event.



Charities/ NFPs

How does a consultant get matched with a charity?

- The PMDoS team (the PMDoS event organisers) will match volunteer consultants with the most appropriate charity/NFP and their initiative or problem. Pairing is based on information submitted during the onboarding process.
- A few consultants will be unmatched until the event so that there is back-up for consultants who may be unavailable due to unforeseen circumstances.



Consultants

➤ Who are the consultants?

You! Practicing project managers who have volunteered for the day.

Thank you!

➤ What is their role?

Each consultant works in collaboration with other consultants in their team to provide a workable solution for the charity/NFP.

➤ Who is the lead consultant?

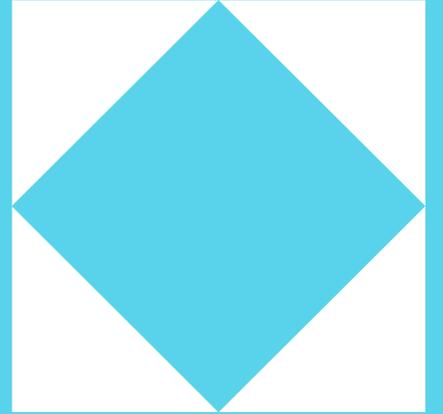
The lead consultant is also a volunteer who is a PMIQ member. Their role is to lead the consulting team and activities on the day.



Consultants

What are the Consultant's responsibilities?

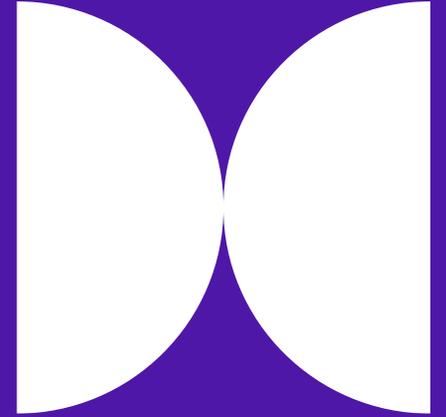
- Represent PMIQ on the day, remember that consultants are the face of PMIQ, and to respect and protect the chapter's interests.
- Conduct themselves professionally.
- Ensure they work with the charity/NFP representatives to get a suitable outcome for the charity/NFP.
- Ensure the documents produced on the day are reasonably structured and polished - no spelling or grammatical errors.



Consultants

What are the Lead Consultant's responsibilities?

- Organise an introductory session with the other consultants in your team prior to the event. This could be on Microsoft Teams (details provided later), by phone, or face-to-face. The PMDoS Team will provide details of the other consultants to the lead consultant.
- Initiate the preparatory work for your charity/NFP. Familiarise yourself and your team with the contents of the Initiative Statement.
- Introduce yourself and your team to your charity/NFP.
- Research your charity/NFP, prepare any tools/documents in advance that will make you and your team more productive on the day.
- Identify tools (software, templates, other) to use on the day.

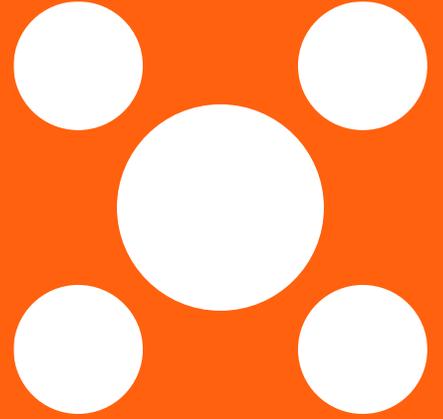


Consultants

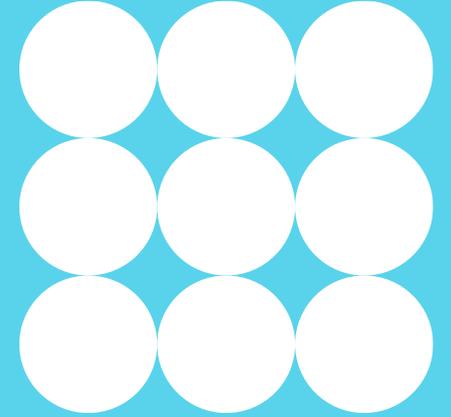
What are the Lead Consultant's responsibilities? (continued...)

Throughout the day:

- Initiate introductions of everyone at the table.
- Facilitate the session. Avoid drifting off into conversations not relevant to the goals and maintain the time frames.
- Ensure the strategic objective of the charity/NFP is met. The discussion and exercises on the day should be focused on the Initiative Statement(s).
- Consult with other Subject Matter Experts or the PMDoS team on the day of the event for any help or assistance.



Additional Roles



The Scribe

- Keep notes of all initiatives and decisions.
- Prepare the roadmap for the charity/NFP.

Floater (Not part of the team)

- PMDoS team and other Subject Matter Experts.
- Provide subject matter expertise.
- Provide guidance on the process.

Process

OPTIONS ANALYSIS: Select the option that will be the best solution



PLAN: Understand the charities / NFP initiative or problem

DEVELOP ROADMAP: Prepare a document outlining the way forward for the charity/NFP

Plan

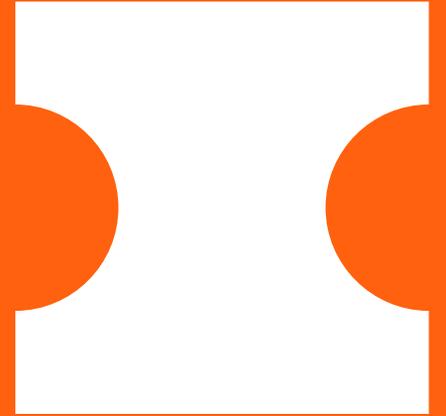
Duration - 45 to 60 mins

Key Tasks

- Introduce the consultants and their roles to the charity/NFP.
- Discover the stakeholders representing the charity/NFP and their roles.
- Review the charity/NFP's Initiative Statement.

Outcome

- Understand the charity/NFP's initiative/problem.



Options Analysis

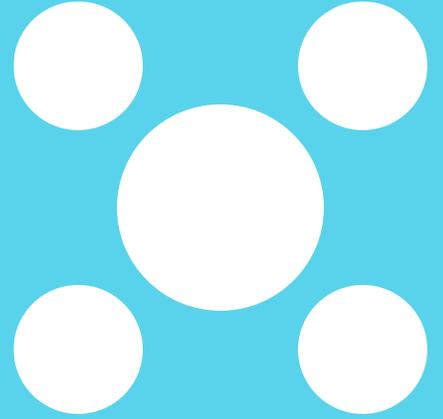
Duration - 60 to 90 mins

Key Tasks

- Identify various options to solve the issue.
- Identify the pros, cons, or impacts of each option.
- Rank the various options based on agreed selection parameters with the charity/NFP.

Outcome

- Select the most suitable solution for the charity/NFP.



Develop Roadmap

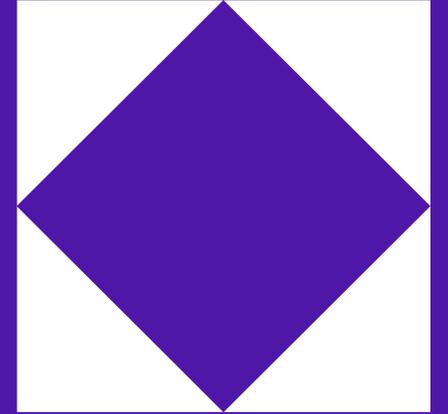
Duration - 4 to 5 hours

Key Tasks

- Develop the selected solution from a concept into a more detailed solution.
- Develop a roadmap from the current state to the desired future state.

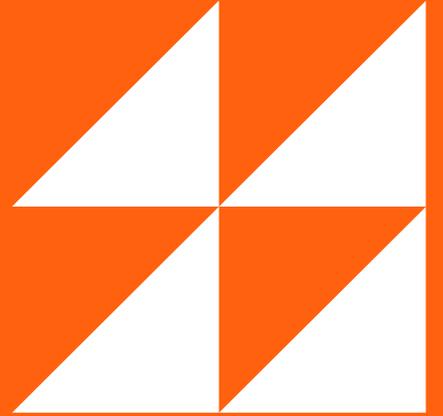
Outcome

- Prepare a document outlining the way forward for the charity/NFP to solve the initiative/problem.



Personal Conduct

- Dress code - Business Casual
- Timing
 - Consultants are expected to arrive by 8:00 am. This will provide time to register, find the table, set up the equipment, and enjoy a coffee.
 - Head to the assigned table to start the day at 8:45 am.
 - Follow the agenda throughout the day.
 - Begin wrapping up at 3:15 for a 4:00pm close of the event.
 - The venue is available until 5:00 pm. Consultants are welcome to use the additional hour if needed.

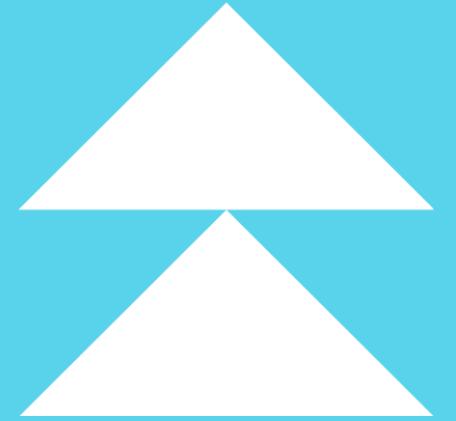


At the Event

What is provided on the day?

- **Whiteboards, pens, and general stationary** for each table.
- **Monitors** on the table will have **HDMI cables** provided. For Mac users, please bring your connector to connect to HDMI.
- A **power-board** is provided on each table.
- **Wi-Fi internet** limited to normal office bandwidth - **NO** video streaming!

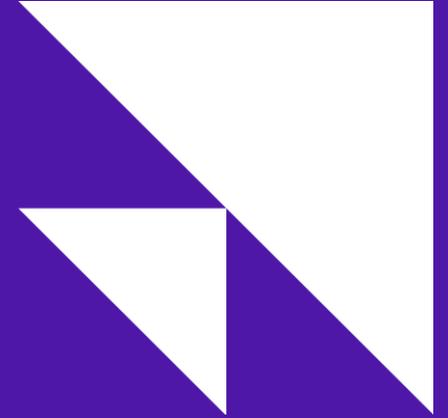
If needed, take pictures of content on the boards and include them in the delivery of materials to the charity/NFP. Please use the materials as needed and return them when complete.



At the Event

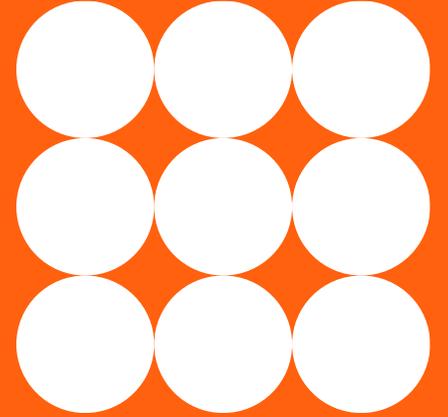
What do the consultants need to bring on the day?

- At least one **laptop** (Windows or Mac) with a HDMI output.
- Documentation **templates**.
- A **USB drive** to give to the charity/NFP with the artefacts produced on the day. However, using Microsoft Teams to store the artefacts is preferred. Artefacts in Microsoft Teams are available until end of Nov.
- **Other tools / software** that your team may need on the day.



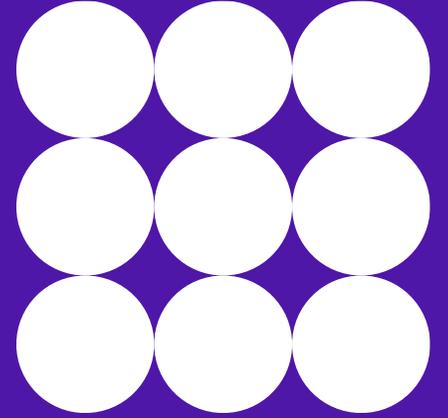
After the Event

- All consultants are expected to complete the agreed outcomes for their respective charity/NFP on the day. The charity/NFP will take the documents from the event and use them to complete their initiative.
- Consultants can liaise with the charity/NFP and continue to offer their services to help deliver the charity/NFP's Initiative – the arrangement will be between the charity/NFP and the consultant and independent of PMDoS/PMIQ.
- For PMP accredited consultants, 8 PDUs will automatically be assigned to your PMI membership after the event.
- The consultants and charity/NFP will be requested to provide feedback on the event. This will help the PMDoS team to address improvement opportunities for the next PMDoS event.



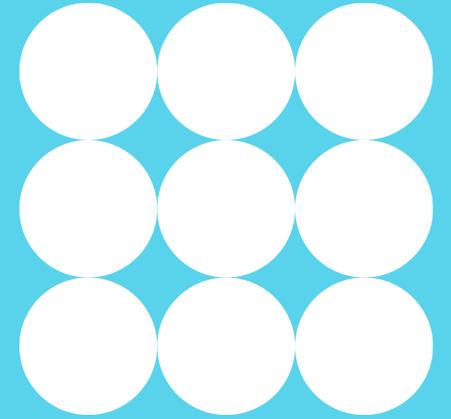
Key Expectations from Consultants

- Come prepared on the day with a clear understanding of the tasks at hand.
- Have a clear objective of what is to be delivered by the end of the day with the team.
- Use the tools the consultant team is familiar with to be optimally productive.
- Be prepared to be flexible in the application of your knowledge and adaptable with regards to the solution.
- Be creative yet pragmatic with your approach to problem solving.



Overview – Tools and Technology

- We have made Microsoft Teams folder accessible to you and charities. You are welcome to use it until the end of November 2022.
- Please use Chat feature within Microsoft Teams to collaborate with your consultant team and charity.



Install Microsoft Teams

➤ What is Microsoft Teams?

It is a collaboration app that helps your team stay organised, collaborate, have conversations and store information - all in **one** place.

➤ How to install Microsoft Teams?

It is available on all major operating environments including [Windows](#) and [Mac](#). Web version is also available.

Please ensure that it is working on your device prior to the event.

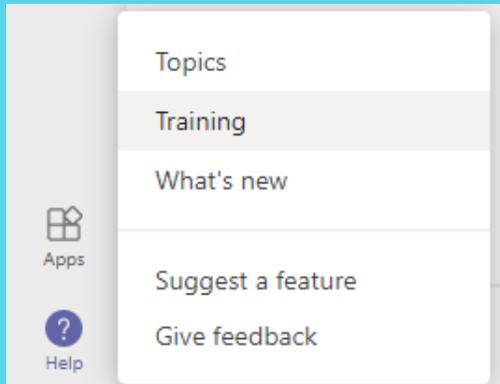


Get to know Microsoft Teams

➤ How can you make most of its features?

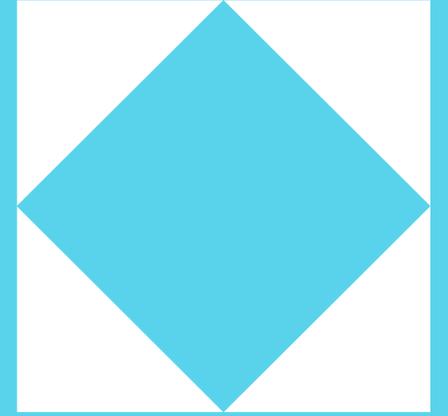
Microsoft Teams has rich training videos. Whether you are a newbie or a pro, training videos got you covered.

After you install Microsoft Teams, click on Help icon on the bottom left in the app and click on 'Training'.



Alternatively, click [here](#) to explore Microsoft Teams training resources.

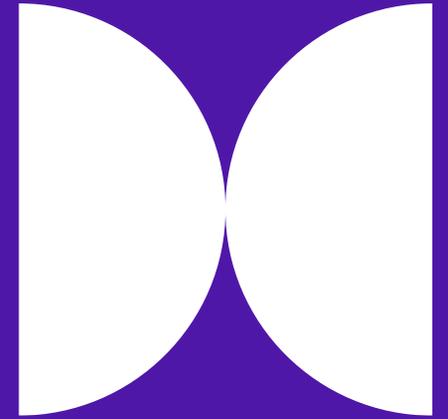
Please familiarise yourself with Microsoft Teams [prior to the event](#).



Collaborate on Microsoft Teams

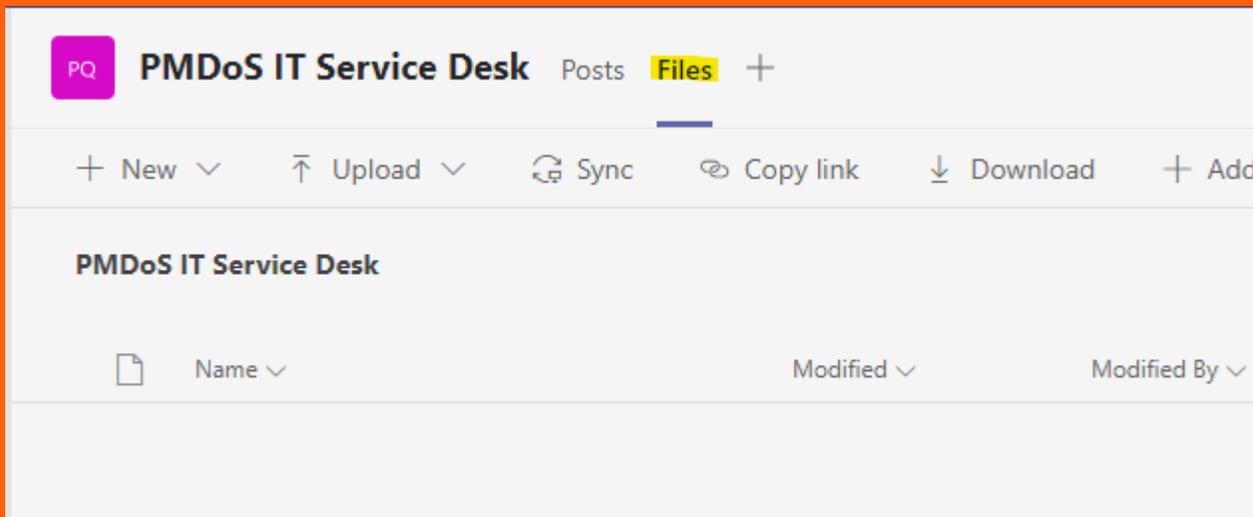
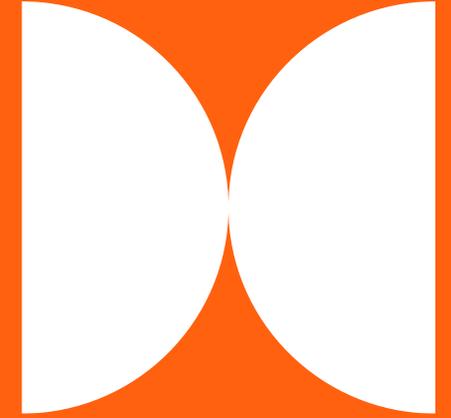
➤ Channel

- In Microsoft Teams, A **channel** is a single place for a team to share messages, tools, and files.
- Successful registration to PMDoS will give you access to *General* channel in Teams to help you get used to Microsoft Teams and interact with fellow consultants. Once you are matched with a charity, you will see a channel appear in your Teams, which will be the name of the charity your team will be working with.
- You can seek technical support by posting your question in *PMDoS IT Service Desk* channel.



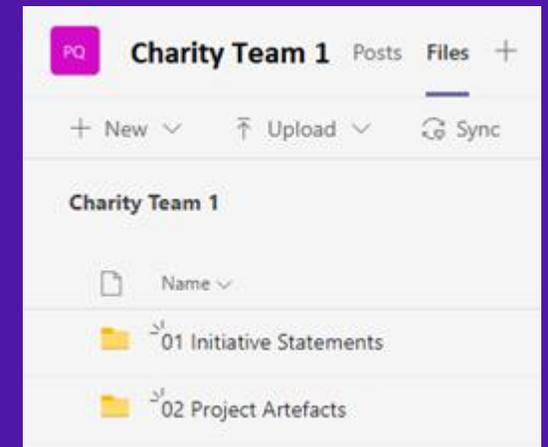
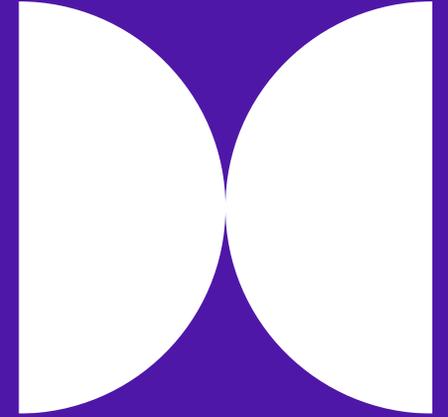
Sharing Files on Microsoft Teams

- Using the Files tab in your channel allows you to share files in your consultant team and with your charity!
- Navigate to 'Files' tab in your channel. Charity members as well as consultants will have access to all the files stored under 'Files'.



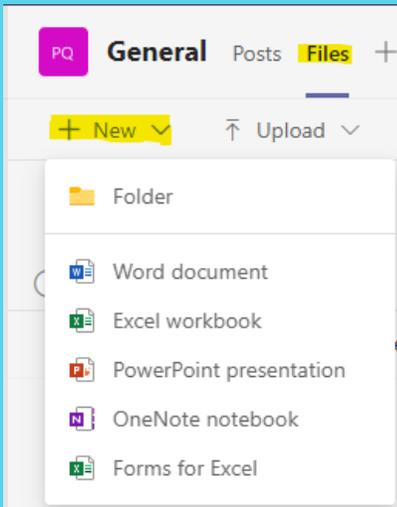
Folder Structure on Microsoft Teams

- PMIQ would like to provide a consistent experience to you and to charities in the use of the Teams folder structure.
- PMDoS Organising Team will setup the following folder structure for each team.
 - **01 Initiative Statement:** Store initiative statements and documentation provided by charities in this folder.
 - **02 Project Artefacts:** Store all artefacts (documents, spreadsheets, images, etc.) that you create on the day in this folder.
- Each team may create additional folders as required.

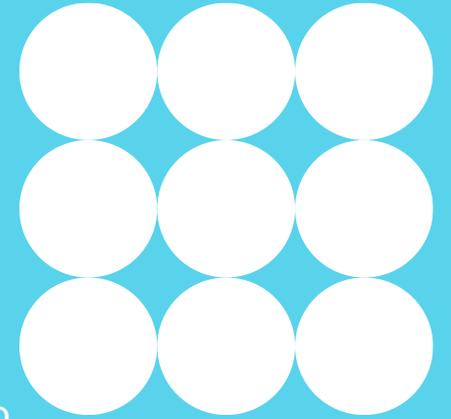


Planning Tools

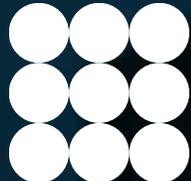
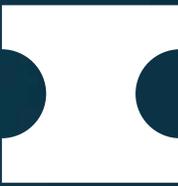
- PMIQ will provide whiteboards, pens and general stationary for workshops throughout the day.
- Please use PowerPoint, Word and Excel applications to capture information that needs to be passed on to the charity at the end of day.
- Navigate to 'Files' tab in your channel and click on '+ New' to choose the type of file you need to create.



- Lead consultants should collaborate with other consultants in their group prior to the event to build right templates.

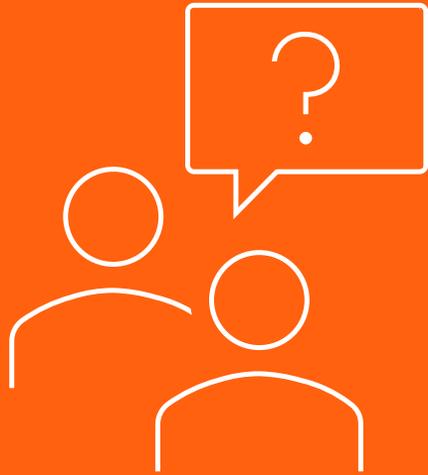


THANK YOU



**Project
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If you have any questions or queries, please visit [PMDoS FAQs](#) on our website.

After you are setup in Microsoft Teams for PMDoS 2022, post your question in the PMDoS IT Service Desk channel for support.

Alternatively, do not hesitate to contact Val Pramana or Maddie Ford at pmdos@pmiqld.org