Stage 5: Managing Results

| **Overview** | | 3 hours 50 minutes |
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| **Key Activities** | * Start and complete the third and last simulation in the program, which is focused on managing project results * Prep for and facilitate a call with the Client Project Manager * Prep for and meet with the Client Executive Sponsor, including completing the Executive Status Report * Debrief the meetings and the overall program | |
| **Key Takeaways** | * Clearly and concisely articulate project issues and mitigation strategies or solutions to project team, leadership, and client, while tailoring the message appropriately to the audience * Identify and clearly describe innovative approaches to solve client challenges, including the pros and cons to each approach * Calmly, strategically, and professionally work through changes, challenges, and issues to determine the best resolution for XX, the project, and client * Manage client expectations by clearly and consistently communicating plans, status, and risks or issues impacting project budget, resources, timeline, or scope | |
| **Coach Prep for this Stage** | * Review Client PM Role Play Guide and Client Executive Sponsor Role Play Guide and instructional videos on the Cornerstone SharePoint site | |
| **Materials to Display** | * Y Company Project Snapshot | |
| **Handouts to Participants** | * None | |
| **Participant Deliverables** | * Completed Executive Status Report | |
| **Where Participants May Struggle?** | * Deciding what to do when a client’s response conflicts with project information * Building/maintaining a positive client relationship while communicating difficult messages or negotiating decisions * Responding strategically in the moment to client questions/pushback * Providing options, including recommended solution, for managing risks and issues | |

Detailed Guide

| **Day 3 Welcome**  Room Discussion | | 5 minutes |
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| **Overview:** Check if any questions from previous day and review today’s agenda | | |
| **Step** | **Details** | |
| 1. Welcome participants | ***Coach Note****: No related details for this step.* | |
| 1. **ASK** if anyone has any questions or additional thoughts to share on yesterday’s activities | * Answer all questions. | |

| **Scenario Overview**  Room Discussion | | 10 minutes |
| --- | --- | --- |
| **Overview:** Set the stage for the final simulation | | |
| **Step** | **Details** | |
| 1. **PROJECT** the Y Company Project Snapshot | * Let participants know that the third, and final, simulation starts now. * Talk through the basics of this client as a classroom. * Set context for timing and logistics using slide 2 of the snapshot. | |
| 1. Set the stage for this simulation | * Our last project is for X Company. * Give participants a minute to review the snapshot. | |
| 1. **PROJECT** the Cornerstone SharePoint Site and direct participants to the project materials | * Go to the Cornerstone SharePoint Site. * Navigate to Day 3, Mini Sim 3. * Direct teams to review the Project Welcome Email from Lee Koenig and the Status Update Email from Alex Mandela.   ***Coach Note****:*   * *Give participants about 2 minutes to read the emails.* * *A link to the Cornerstone SharePoint Site is in their participant email.* | |
| 1. **ASK:** Do you have any questions on the project or what you are doing next? Who you are preparing to meet with? | * Clarify for participants as needed without giving away any key information.   + Complete Executive Status Report for meeting with Pat.   + Call with Alex (Client Project Manager) to discuss project status and other project topics (since Alex can’t be at the meeting with Pat).   + Status Meeting with Pat (Executive Sponsor) to discuss project status and topics. | |
| 1. Facilitate a discussion to tie the simulation to the framework and Negotiations breakout | * Which elements from the framework do you think will be most relevant to this project? * How do you think those elements apply to this situation? * How might you apply what you learned during Negotiations breakout? | |
| 1. Direct teams to the meeting schedules on the SharePoint site | * Confirm that participants understand the location and start time for their meeting. * For the call with Alex, they can pick one person to facilitate the call. * For the meeting with Pat, they can decide how to facilitate the meeting (e.g., one person speaks, two people speak, everyone speaks) * Everyone on the team should be prepared to answer questions in either meeting. * When not on a call, they should continue prepping for their meeting with Pat. * Advise them to use this time to review materials and prepare for the meetings. | |

| **Prep for Client PM Call**  Team Work Session | | 40 minutes |
| --- | --- | --- |
| **Overview:** Teamsprep for a call with the Client PM (Alex Mandela) and a separate meeting with the Client Executive Sponsor (Pat Giuliani) | | |
| **Step** | **Details** | |
| 1. As participants work, circulate the room | ***Coach Note****: As needed, guide teams as they complete their meeting prep and materials.*   * *What is your strategy for the call with Alex?* * *How do you plan to facilitate this call? (e.g., who is doing what)* * *What is your strategy for your meeting with Pat?* * *How do you plan to facilitate this meeting? (e.g., who is doing what)* * *What questions do you think Pat or Alex will have?* * *What topics do you plan to discuss with the client? What reactions or questions do you think the client will have regarding each topic?* * *What updates are you providing on the status report?* | |
| 1. When there are **15 minutes** remaining, transition to your meeting location | ***Coach Note****:*   * *You can go anywhere to take this call.* * *Keep in mind that the Executive Sponsor meeting immediately follows the last call. Make sure you have enough time to transition to your Executive Sponsor meeting location.* | |

| **Client PM Call**  Role Play Call | | 1 hour 5 minutes |
| --- | --- | --- |
| **Overview:** Teams conduct a call with the Client Project Manager | | |
| **Step** | **Details** | |
| 1. As teams return from their call, they should continue working | ***Coach Note****:* *If they have time, they may take a short break.* | |

| **Client Executive Sponsor Status Meeting**  Role Play Meeting | | 1 hour 5 minutes |
| --- | --- | --- |
| **Overview:** Teams meet with the Client Executive Sponsor | | |
| **Step** | **Details** | |
| 1. As teams return from their meeting, they may take a break | ***Coach Note****: No related details for this step.* | |

| **Classroom Debrief on Client PM Call & Executive Sponsor Meeting**  Room Discussion | | 20 minutes |
| --- | --- | --- |
| **Overview:** Discuss key lessons from the Client PM Call and Client Executive Sponsor Meeting | | |
| **Step** | **Details** | |
| 1. **ASK:** How did the call with Alex (Client PM) go? What went well? What didn’t? Why? | * Guide participants to reflect on what they did well and should keep doing, and how they can improve in their next meeting (e.g., better prep, build rapport, adapt in the moment). * Share any related stories you have. * If you have the evaluations from the Role Players, do a quick review and comment on anything that stands out to you or seems consistent across all the teams. | |
| 1. **ASK**: How did the meeting with Pat (Executive Sponsor) go? What went well? What didn’t? Why? | * Guide participants to reflect on what they did well and should keep doing, and how they can improve in their next meeting (e.g., better prep, build rapport, adapt in the moment). * Share any related stories you have. * If you have the evaluations from the Role Players, do a quick review and comment on anything that stands out to you or seems consistent across all the teams. | |

| **Program Debrief**  Room Discussion | | 25 minutes |
| --- | --- | --- |
| **Overview**: Step out of the simulation and debrief on key lessons learned from the program, share stories, and reflect on how these skills apply to their real-world project work | | |
| **Step** | **Details** | |
| 1. Let participants know you are all stepping out of the simulation to debrief the program | ***Coach Note****: No related details for this step.* | |
| 1. **ASK** teams to remove all program materials from their machines | * For program integrity, all materials related to the program must be removed from their computers. | |
| 1. Ask participants to write down their biggest “a-ha” moment from the day | * Use the post-it notes at your table to write down your biggest “ah-ha” moment from today. * Stick the post-it note to the framework poster on the element that it fits best | |
| 1. Facilitate a discussion on the “a-ha” moments from the entire program | * Ask 3-5 participants to explain the ah-ha moments they added to the poster. * Challenging / surprising moments? * “A-ha” moments; what really helped them the most? * How can they continue growing the skills learned in the program? * How will they change their approach to project management?   ***Coach Note****:*   * *Create an environment of openness and connection for this discussion.* * *Share stories that provide insights into managing projects (e.g., best practices, tips, what to avoid or be aware of).* * *If applicable, tie your stories to the Cornerstone Framework and the other topics from the program.* | |
| 1. Thank participants | * Thank them for their time and focus over the last few days. * Congratulate them on finishing the program. | |
| 1. Give reminders | * Remind them of the Finishing Touches plenary. | |