Project Management Curriculum Development & Training Delivery

Top U.S. Accounting Firm

A $2.5B USD, 11K employee, assurance, tax, and advisory professional services firm with 80+ offices nationwide that supports 800+ Alliance firms, making up the world's 5th largest accounting network.

The Need

The company's Executive Leadership team identified project management as a priority skillset across the organization to improve overall efficiency. Teams were currently struggling to collaborate across multiple business lines, use common project management terminology and tools, or consistently leverage project management best-practices. The company's primary goal was to build a progressive Project Management curriculum, from foundational skill building incorporating both traditional and agile project management practices, up to advanced skill development related to risk management and interpersonal communication. Training solutions needed to be tailored to align with the company's pre-existing guiding principles around project management and be integrated into their broader professional development milestone curriculum.

The Solution

The company collaborated with Project Management Academy to develop an initial 2-year curriculum to train over 300 students in a **company-tailored version of Project Management Fundamentals** via virtual, instructor-led training sessions. Courses were developed to also satisfy CPA's CPEs requirements. Courses were delivered just two months after the contract was fully executed. Additional on-demand course in specialized areas of project management have also been provided to reinforce classroom learning through a customized and co-branded LMS.

The Result

Initial rollout of the customized training curriculum has yielded a common project management vocabulary, improving cross-functional collaboration. Training is being iteratively deployed in alignment with newly promoted Senior Manager milestone trainings with requests for agile-focused project management training and more advanced PMP® certification prep training.

When our firm began a search for a comprehensive Project Management curriculum vendor, Educate 360 quickly separated themselves as a premier choice. From our very first meeting, our dedicated Business Development Director and the Educate 360 team displayed an elite level of professionalism, customer understanding, and Project Management expertise. They acutely listened to our needs and vision, collaborated closely with our team, and swiftly provided top tier content that our professionals found to be both insightful and impactful. Their material and the excellent instructors who rolled it out have invigorated our professionals and laid a vital foundation for a firm-wide Project Management initiative. They've continued to be valuable content providers and collaborators, and our firm looks forward to continuing our fruitful and productive working relationship.

~ Internal Curriculum Specialist,
Leadership Development

Educate 360
Professional Training Partners

Agile Transformation

Global Insurance Brokerage Firm

A $3.1B USD, 50K employee, global professional services firm providing a broad range of risk, retirement and health solutions using proprietary data and analytics to deliver insights throughout 120 countries throughout the world.

The Need

Leadership of the company's smallest but fastest growing business unit needed to ensure the team was poised to increase product speed to market to stay relevant in the quickly evolving competitive landscape. The team needed to gain skills that would enable more rapid adaptation/pivots to changing business requirements, improve product quality, and increase overall team productivity.

The Solution

Multiple 2-day Agile Fundamentals trainings were conducted across product development teams in-person and virtually, with team members from the UK, China, South America, and India. Subsequent training delivery schedules were tailored across 5-days and shorter durations to better align training topics to project milestones. Coaching support was provided directly to the company's Scrum Masters and Product Owners through initial product sprints to ensure optimal performance. Through this engagement, our consultant partnered with the company to develop and document a proprietary methodology to adapt Scrum principles to the unique aspects of company's development environment (e.g., SOX compliance, reporting, Azure DevOps) and supported the standup of the internal Change Team to integrate and sustain organizational change management best practices.
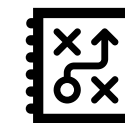
The Result

Throughout the company's 5+ year engagement with Project Management Academy and Watermark Learning, Agile project management training, coaching, and consulting has been delivered across 7+ internal teams to support the organization's Agile Transformation journey. The business unit has increased delivery to the market by 80% (surpassing their goal) with a lower defect rate than prior year with increased employee engagement/satisfaction scores across the business unit.

Agile Fundamentals Workshops
Beginner Training

Provide an overview of the Agile mindset and teach the tools, techniques, and practices used in Agile projects in a highly interactive session with breakout group exercises tailored to your organization's projects.

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Agile Coaching
Ongoing Support

Ensure employees are effectively applying what they learned in training to their job roles by providing 1:1 coaching support to team members, planning and facilitating hands-on workshops, and identifying real-time areas for improvement.

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Agile Consulting
Deliverable-based

Identified a need for the creation of a proprietary company framework that incorporated agile best practices with organizational-specifics. Conducted discovery to analyze needs and develop methodology for training rollout.

"Our instructor was a great presenter. It was challenging to do this training remotely with such a wide group of people, but she handled it well and it taught me a lot."

Product Owner, Operations

CRM Migration to Python-based System

Human Capital Management Solution Provider

A $16.5B USD, 60K+ employee, global, cloud-based solutions company that unites HR, payroll, talent, time, tax and benefits administration for over 1 million clients throughout 140 countries.

The Need

The Sales Operations team needed to leverage new data sources to be ingested and connected to a separate CRM which required Python knowledge and the utilization of predictive and data visualization Python libraries. Technical members of the data science and engineering teams needed to shift from Java and learn the basics of Python, data manipulation, automation and some basic Machine Learning libraries.

The Solution

On-site instructor-led training for three days at company headquarters covering NumPy, Pandas, Matplotlib and Seaborn in the first two days. On the last day, the instructor guided student group through machine learning principles using Scikit-Learn, including a customized learning project with anonymized client data. All students also received 6-month access to self-paced video course materials as a supplement to reinforce and expand upon the learnings from the instructor-led workshop.

The Result

Rapid upskilling of data team allowed for team members to quickly integrate new Python data libraries to perform regression forecasting to support more predictive Sales Operations activities. Our Python training enabled the students to complete a project matching company-specific accounts to the client's CRM using fuzzy string matching. Students were able to continue to learn more skills post-training via the included self-paced video courses.

New Horizons®

Specialized training in
Data Science & Machine Learning

Python for Data Science

Intermediate

Learn how to use the key libraries in the Python Data Science ecosystem. This course covers NumPy for numerical data processing, Pandas for data analysis, and Matplotlib and Seaborn for quick visualizations and statistical reporting.

Python for Machine Learning

Advanced

Review a variety of machine learning methods from linear regression to unsupervised learning and learn how to choose a model, train the model, and evaluate and tune the model for deployment using the Scikit-Learn Python library.

On-Demand Data Science Training

16+ Courses | 250+ Hours | 400+ Workbooks & Exercises

Access to an entire library of self-paced video training to review introductory data science topics, gain additional specialized data science skills, and expand into more advanced topics such as NLP, Deep Learning, and Computer Vision.

Data Analytics Program Initiative

Global Transportation, E-commerce and Business Services Company

A $94B USD, 550K employee, multinational conglomerate operating in 220+ countries offering time-definite delivery, international trade, small-package ground and residential delivery, freight, and other business services.

The Need

Over 200 auditors within the organization needed to understand how to build Microsoft Power BI dashboards for reporting and analytics on business performance. Once trained the organization was able to also deploy Microsoft Automate to organize and notify employees of deadlines and projects. Further needs analysis focused on querying of multiple databases to aggregate large amount of data.

The Solution

Working with the clients Subject Matter Experts, United Training created a repeatable training curriculum to 200 Internal Corporate Vice Presidents and Associate Auditors. From design to delivery, United Training provided a unified process improvement and trained the staff on how to maximize the efficiency of the process. Training started with Dashboard in a Day and culminated in extensive training in database management.

The Result

This organization has a strong use of data analytics being utilized by Data Analysis practitioners. Skilled in the various methods and best practices that are in line with business and technical requirements for modeling, visualizing, and analyzing data with Power BI. Theses skills allow to access and process data from a range of data sources including both relational and non-relational sources. Organizationally deploying reports and dashboards for sharing and content distribution.

New Horizons®

Sample of Program Curriculum

Dashboard in a Day
Beginner Training

Gain confidence in building and servicing basic Power BI solutions in a one-day, hands-on workshop.

Power BI Microsoft
Beginner Training

Best practices for business and technical requirements for modeling, visualizing, and analyzing data with Power BI

ITIL v4
Beginner Training

Targeting improvement in business processes and erecting an efficient service desk methodologies.

SQL Querying
Intermediate Training

Compose advanced SQL queries to retrieve desired information from a database and generate a report.

United Training has an excellent technical platform, and the instructors are well versed in conducting remote classes to teach a wide portfolio of subjects. One prominent use of UT is preparing our Data Analytic Champions to use SQL and Power BI.

~Audit Advisor, Performance Assurance

Multi-Discipline IT Training Program

Technical Professional Services & Engineering Company

A $44B USD, 55K employee, global technical professional services firm providing engineering, technical, professional and construction services for government and private sector clients across 40+ countries.

The Need

IT Leadership identified the need for its technical workforce to stay abreast of emergent processes and technologies to better serve their client. Ensuring the firm would be best positioned to retain and win new business was dependent upon their ability to retain high performing employees and target improvement in both business processes, acceleration of cloud adoption, and erecting an efficient service desk based on ITIL methodologies.

The Solution

A multi-modality training program was designed to reach 500+ IT staff, utilizing both on-demand and live virtual training formats in the areas of ITIL, Azure/AWS Cloud, COBIT, Agile, Scrum, DevOps, and Project Management disciplines. These solutions addressed both skill gaps and allowed for elective classes to be pursued by high-performers as a benefit. The overall training program expanded from one IT group to now include the entirety of IT worldwide. Client has continued to renew and expand the training program for several years in a row and now views this training as a vital benefit to the ongoing development of their staff.

The Result

Client noted that our training solutions have now allowed them to make a decisive jump into the cloud, that ITIL v4 methodologies are now consistently executed in follow-up to our training sessions, and that employee annual reviews have improved with several high-value team members explicitly noting that they appreciated the training opportunities afford to them through our program, which has led to increased employee retention levels in the IT department.

New Horizons An Educate 360 Brand

PROJECT MANAGEMENT ACADEMY®

Multi-Modality Training Program

Sample of Program Curriculum

ITIL v4
Beginner Training

Targeting improvement in business processes and erecting an efficient service desk methodologies.

CLOUD
Azure and AWS

Acceleration of cloud adoption utilizing a decisive jump into the cloud hybrid technologies.

DevOps
Beginner Training

Improve communication, collaboration, and processes between the various roles in the software development cycle.

Scrum
Beginner Training

Build a foundation for anyone seeking to develop fluency in Agile/Scrum concepts, terms, and practices.

Project Management Skills
Beginner Training

Provide an overview fundamental elements of the project lifecycle – from project initiation through project close.

COBIT
Beginner Training

The COBIT Core Model provides the platform for establishing IT governance and management program.

Private Group Training | Public Open Enrollments | On-Demand Training