

• MODULE 0 • ORIENTATION

Welcome to the Grace PM Excellence Academy

We are here today to get you caught up.

After today, you're current.

• THE STANDARD

You're joining a standard.

By the end of today, you'll begin to understand what that standard is.

It wasn't handed down. At Onsite #1, large groups sat in one room and decided what great delivery looks like — together.

—— *Do Good. Be Great.*

- ACTIVITY

Projects rarely fail
because of one
technical decision.

THE PROMPT

Think of a project that
slipped because nobody
truly owned the outcome.

- OPEN DISCUSSION · UNMUTE OR DROP IT
IN CHAT

Your words become the evidence.

• UNDER PRESSURE

How we respond when it's on us.

01.

The Coordinator

Keeps the work moving.

Busy – but the outcome drifts.

02.

The Designer

Protects the technical quality.

Great work, missed deadlines.

03.

The Pleaser

Protects the relationships.

Everyone's happy; nothing's owned.

DISCUSS When the pressure's on — which is most like you?

All three matter. None of them owns the outcome.

• THE IDENTITY

What your
experience
just told us.

YOUR WORDS, A MOMENT AGO

Unclear ownership

Assumptions

Late decisions

Poor communication

Avoided conversations

The Accountable Owner

Closes the gaps everyone else works around.

• VALUE · THE PM CREATES IT

$$\text{Value} = \text{Performance} \times \text{Experience}$$

PERFORMANCE

Scope delivered according to the agreed price.

Schedule achieved without unnecessary pressure.

Client budget protected.

Technical quality achieved.

EXPERIENCE

Client confidence, earned through responsiveness, proactive communication, and an accessible team.

Team confidence, earned through clear expectations and priorities, and workload conditions conducive to success.

Trust, earned by making commitments and following through.

• THE THREE BEHAVIORS

Ownership becomes visible through behavior.

01. Establish Clarity

Everyone knows the outcome, the scope, and the commitments — before work advances.

Define the scope and the decision-maker before the team starts.

02. Control Advancement

Work advances intentionally. Nothing moves forward by accident.

Nothing advances on an open question.

03. Protect Integrity

Guard the design, the technical quality, and the fee as the work proceeds.

Hold the quality gate, even under schedule pressure.

- FROM ONSITE #1 · THE OPENER

Spec & Fly.

Tables raced to reproduce a paper plane only one person could see — built from words alone.

ROUND 1 No questions allowed. A confident sender talking into the void — planes missed the spec.

ROUND 2 Same plane, same spec — but questions allowed. The loop opened, and scores jumped.

THE POINT

*Clarity isn't what you said.
It's what they flew.*

A fuzzy spec still builds a plane. It just misses what the client needed — rework, a blown fee, a client's trust.

- ESTABLISH CLARITY · BEHAVIOR 01

• THE LIFECYCLE

The same three moves, every phase.

Pursuit &
Contracting

Initiation &
Planning

Design &
Coordination

Construction
Administration

Closeout &
Growth

• CLIENT EXPERIENCE

Confidence.

The client is confident at every gate — decisions named, changes priced, no surprises.

• TEAM LEADERSHIP

People.

The team knows its roles, coordination holds, and quality is built in — every gate clears QC.

• BUSINESS MANAGEMENT

Result.

Budget, schedule and fee stay visible — variances caught in-phase, not at the deadline.

Onsite #1 built this map by hand. The modules train it.

• FROM THE COURSE SITE · LEADERSHIP OUTCOMES MAP

What must be true, at every phase gate.

	PURSUIT & CONTRACTING	INITIATION & PLANNING	DESIGN & COORDINATION	CONSTRUCTION ADMIN	CLOSEOUT & GROWTH
• CLIENT <i>Confidence.</i>	Success criteria, drivers & decision-makers are documented as measurable factors.	Deliverables, schedule & the decision process are confirmed with the client.	Approvals & scope changes stay timely, documented & tied to agreed goals.	Issues are surfaced with options before they become surprises.	The client feels well served, gives strong feedback & stays open to future work.
• TEAM <i>People.</i>	Delivery leadership, risk posture & the consultant team are aligned before committing.	The team knows its roles & the BIM environment is ready before design begins.	Cross-discipline coordination holds & quality is built in — every gate clears QC.	The team keeps cadence & quality through construction administration.	Lessons are captured & the project record is complete.
• BUSINESS <i>Result.</i>	The pursuit clears a logged Go/No-Go; fee, risk & complexity are accepted intentionally.	Budget, schedule, staffing & fee are locked, visible & under contract.	Variances are caught early & corrected in-phase; financial health is protected.	Variances are corrected in-phase; financial health is monitored & protected.	Cash is collected & the project is formally & cleanly closed.

• FROM THE COURSE SITE · PM RESPONSIBILITIES MAP

What the PM actually does, inside each phase.

	PURSUIT & CONTRACTING	INITIATION & PLANNING	DESIGN & COORDINATION	CONSTRUCTION ADMIN	CLOSEOUT & GROWTH
• CLIENT <i>Confidence.</i>	• Success criteria defined • Decision-makers identified • Reviewed in Go/No-Go	• External kickoff held • Cadence established • Risks communicated	• Milestone approvals obtained • Scope reviewed vs. contract • Concerns addressed	• Contractor recommended • NTP issued • AIA instruments issued	• Final feedback obtained • Punchlist completed • Future work identified
• TEAM <i>People.</i>	• Delivery leadership engaged • Risk posture aligned • Consultants proposed	• Internal kickoff completed • BIM environment set up • Roles communicated	• BIM Execution Plan set • Technical reviews completed • Drawings & specs published	• Bid process run • RFIs & submittals processed • Field reports filed	• Lessons learned completed • Project A3 finalized • Knowledge transferred
• BUSINESS <i>Result.</i>	• Fee estimate completed • Go/No-Go logged • Contract executed	• Budget & staffing set in BST • Schedule approved • Contracts filed	• Variance reviewed each cycle • Phase estimates provided • Forecast completed	• Pay applications reviewed • Pre-bill review completed • Profitability reviewed	• Financial closeout completed • AR resolved • Archive zip requested

• THE STANDARD

Do Good.
Be Great.

• THE RUNNING CASE

Oakhaven.

PROJECT SNAPSHOT

Week 3 of design

Mechanical systems won't fit the mechanical spaces

Design keeps progressing anyway

Nobody owns the interface

DISCUSS What broke first?

A. Clarity

B. Advancement

C. Integrity

• THE BUSINESS · WHY THE PM OWNS THE NUMBERS

Your behaviors land on the income statement.

OAKHAVEN · A \$1.4M NET FEE

Net service fee	\$1,400,000	100%
– Direct labor (billable)	\$407,400	29%
– Indirect labor (non-billable)	\$244,400	17%
– Other expenses	\$468,200	33%
= Profit (target)	\$280,000	20%

- Establish Clarity → the fee ceiling
Price the scope, settle the decision-maker — value perception sets the top line.
- Control Advancement → utilization
Billable vs. non-billable is utilization — Grace targets 62.5%. Your who-does-what moves it.
- Protect Integrity → the labor line
A missed quality gate is rework — billable hours spent twice.

Two of the three levers are yours. The real math is Modules 2 & 3.

• HOW THIS ACADEMY WORKS

One sixteen-week practice cycle.

FRI · UNLOCK → TUE · FEEDBACK → THU · LIVE

Watch

Work

Check

Discuss

Reflect

↻ *Repeat*

This isn't twelve classes. It's one cycle you repeat.

• CATCHING UP · WHAT THE ROOM COMMITTED TO

You leave with the same three commitments.

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| 01. | Frame your throughline project | One real project you carry through every module — fee, burn, schedule, team. |
| 02. | Write two or three goals | Each tied to one behavior and your project — specific enough to be a Scorecard line. |
| 03. | Join a peer pod | Three or four cross-discipline peers, standing for the whole program — check-ins at weeks 4, 8 and 12. |

“Review burn weekly on Riverside” — not “be more financially aware.”

• NEXT WEEK · MODULE 1

The role of the project manager.

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| 01. | Leadership Outcomes | Five outcomes you're answerable for. Results, not tasks. |
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| 02. | Face of the Firm | To the client, you are Grace. Every interaction represents us. |
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| 03. | Accountable Owner | The role is bigger than coordination. You own the whole outcome. |
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Next week, we begin building the role.

• WHERE YOU BEGIN

Your job isn't to keep projects moving.
Your job is to own outcomes.

— *That's how we Do Good. Be Great.*

Welcome to Cohort One.