



ONSITE #1 — KICKOFF

Design that Defines. Impact that Endures.

DAY AT A GLANCE

One room. One standard. One day.

Morning

9:00	Welcome & the mandate
9:25	Spec & Fly · the Establish Clarity opener
9:40	Warm-up: best & worst projects
10:10	Block 1 · Sort the roles, discover the behaviors
11:30	Gap & Tool Inventory
12:00	Lunch

Afternoon

1:00	Recall game · Run the Lifecycle
1:20	Business stream: why the PM owns the numbers
2:05	Throughline project setup
2:20	Goals + peer pods
2:55	Close: how the 16 weeks run + commitments

HOW THE DAY WORKS

Four principles that hold all day

1

Reconcile, not correct

When the firm's view goes up beside your work, it's two views to reconcile — never a grade.

2

Standing validators

Identify your more experienced PMs at your table.

3

Deliberate tables

Mixed background and seniority on purpose.

4

Table-run roles

Each table runs its own timekeeper and shares; projected timers keep us honest.

PM Excellence = three core behaviors

I Establishing Clarity

Define the finish line — scope, fee, the one decision-maker — before the team starts.

How clear is the operating standard on each of your current projects?

II Controlling Advancement

Watch burn and schedule weekly; act on drift the same week. The business result is yours.

How in touch are you with current priorities, and current performance against targets?

III Protecting Integrity

Pull the right SME in early; hold the quality gate even when the schedule is screaming.

How confident are you in the quality process? How comfortable are you holding the line during conflict?

We decide what great delivery looks like — today, together

Until now, “good” has lived in each office’s habits. Today, in one room, we decide what great delivery looks like across GRACE — and who owns it on every project.

That’s you.

A decision the room makes together — not a policy handed down.

You're seated on purpose

1

Mixed on purpose

Backgrounds and seniority deliberately mixed at every table.

Introduce yourself to your tablemates.

2

Name your validators

Each table names 1–2 experienced PMs as validators — the role runs all day.

Establish your validators. These people share out on behalf of your group after activities.

3

Pods are coming

Preview: cross-office peer pods form this afternoon.

Look around the room and identify who your optimal “peers” may be for accountability.



THE ESTABLISH CLARITY OPENER

SPEC & FLY

Build it blind. Fly it true. Find out what “I told them clearly” really costs.

GRACE PM Academy · 10-minute table warm-up · first activity of the day

One person sees the plane. Everyone else flies blind.

Your table races to reproduce a plane nobody but the Architect can see.

1

The Architect

One teammate sees the master plane and talks the table through folding it. No showing it.

2

The Builders

Everyone else folds their own from words alone. No peeking, no naming the design.

At your table — 30 seconds to set up

1

Pick your Architect

One person, ideally someone who can explain without their hands. They get the hidden master plane.

2

Grab your supplies

A sheet of blank paper and a pen for every builder. That's all you need.

Architects — keep that plane hidden. Builders — paper ready.

ROUND 1

Build it blind.

5 MIN

Architect talks. Builders fold.

Describe the folds out loud. Build your own plane from the words — one each.

No questions. No peeking.

Builders stay silent. Architects never show the plane or name the design.

This round is supposed to be hard. That's the point.

Throw on “go.” Score the spec.

Architects, hold up the master. Score your table's best plane — one point per feature it actually has.

On my “go,” the whole room throws at the client zone.

Most points wins the round.

THE SPEC — 6 POINTS

- ☐ Nose folded to a sharp point
- ☐ Both wings the same size
- ☐ Wings folded down, not up
- ☐ A straight, creased center spine
- ☐ Symmetric — mirrors left to right
- ☐ Flies nose-first, not tumbling

ROUND 2

Open the loop.

≈ 5 MIN

New Architect, new plane.

Swap to a different teammate. They get a fresh hidden master.

Now questions are allowed.

Builders can ask anything. Architects can answer — still no showing the plane.

Same spec, same scoring.

Build, then fly at the client zone and score the six features again.

Throw on “go.” Score the spec.

Architects, hold up the master. Score your table's best plane — one point per feature it actually has.

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Two questions.

1

Your scores changed in Round 2. What changed?

Nothing about the plane. You opened a feedback loop — questions, answers, confirmation. Round 1 was a confident sender talking into the void.

2

Where does Round 1 happen on your projects — and what does it cost?

Scope in an email. A “quick” verbal direction. An assumed spec nobody confirmed. The plane still gets built — it just misses the zone. And a miss has a price: rework, a blown fee, a client’s trust.

THE POINT

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

This is Establish(ing) Clarity.

The first of the three PM behaviors — and the PM's job, not the team's. A plane built from a fuzzy spec still flies. It just misses what the client needed. Clear direction takes a loop, not a confident sender.

Let's get clear on what
“good” looks like.

Best project. Worst project. Then tag why.

≈ 15 MIN

- 1 You captured these in prework (Sheet 1) — open to your best and your worst.
- 2 At your table, share the 60-second version of your best and your worst. Jot the behaviors or systems you hear on post-its.
- 3 Tag the cause against the three behaviors: Clarity · (Control) Advancement · Integrity.
- 4 Tag behaviors and systems — never people. What helped the team perform? What did the work need?

Best

I always knew what my role was, and how it fit into the overall approach to the project.

Maintain clarity

Split the cards to where they'll be used

BEST

As a group, identify the “Top 5” most important behaviors or systems that contributed to the “best” projects.

Search for and identify consistency across the stories you heard.

WORST

As a group, identify the “Top 5” most important (or adverse) behaviors or systems that contributed to the “worst” projects.

Search for and identify consistency across the stories you heard.



Sort the roles, discover the behaviors

You'll build the PM role with your hands — and uncover the three behaviors that run through every stage.

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Build the role in three layers

1

Outcomes

Already posted.

What good looks like at each stage.

2

Responsibilities

You build it next.

Everything the PM actually owns.

3

Behaviors

You uncover it last.

The “how” that makes the difference.

Place every card in the stage where it first becomes the PM's job

- 1 Work fast — debate is welcome. Validators adjudicate.
- 2 Dab the GAP box on any card naming something you don't do consistently.
- 3 Leave the P / B / T cause boxes blank for now.
- 4 Prepare to discuss: *Where did your table disagree? Which cards were hardest to place?*

One card · one responsibility ·
a stream-colored edge

18 MIN

What's on the card

GAP box

Dab / check it if this isn't done consistently today.

P / B / T

Process · Behavior · Tool
IGNORE FOR NOW

Edge color = stream

● Client ● Team ● Business



The PM is what makes the difference.

At each stage, find the one responsibility where your **best project** and **your worst project** went in different directions.

Ask: *what did the great PM do there that the struggling one didn't?*

Write that action start it with a verb on a post-it, and stick it on that stage.

Grace Project Delivery Process Map

Phase		PM Training Program				
Value Stream		Pursuit and Contracting	Initiation and Planning	Design and Coordination	Construction Administration	Closeout and Growth
Client Experience						
Team Leadership						
Business Management						

A few examples.

Initiation stage.

Responsibility: "set the baseline budget and confirm scope."

Best project: scope and the one decision-maker were locked before anyone started.

Worst: the team started designing into a fuzzy scope and churned.

Behavior post-it: "Pin the finish line before anyone starts."

Execution stage.

Responsibility: "monitor budget and schedule variance."

Best: the PM caught drift in hours weekly and acted.

Worst: the PM never reviewed project financials and only cared about the design.

Behavior: "Watch burn weekly; act on drift the same week."

Behavior, not task

The test: “Could someone watch you do it — and could you do it again next week?”

BEHAVIOR ✓

- Refuses to let the team start until the finish line is defined — scope, fee, decision-maker.
- Looks at burn and schedule every week and acts on drift the same week.
- Pulls the right SME in early and holds the quality gate.

TASK ✗ (not a behavior)

- “Holds a weekly project meeting.”
 - The meeting is a task; the behavior is what you do in it: surface bad news early and reallocate.
- “Submits the budget in BST.”
 - That’s operating a tool, not leading.

What did the PM DO at each stage that made the best project soar?

- 1 Point back to your best-project notes. Talk as a table.
- 2 Identify your table's top three behaviors for each lifecycle stage.
- 3 Write them on clean post its — placed in the Behaviors band of your blank page
- 4 Each table picks its single strongest behavior per stage — bring those five to the wall.

Pursuit / Contracting

Setup & Planning

Design & Coordination

Construction Administration

Closeout

YOU JUST REDISCOVERED THEM

You built these — they weren't handed to you.



Establishing Clarity



**Controlling
Advancement**



Protecting Integrity



Gap & Tool Inventory

You'll name the real gaps in how we work today — and leave with the ones that matter most owned.

“Design that Defines. Impact that Endures.”

Why doesn't this happen consistently? Dab one cause.

P

Process

There's no clear, agreed way. People improvise, or it falls through the cracks.

B

Behavior

The way exists, but the skill or habit isn't there. Routes to the training.

T

Tool

There's a way and the will, but no tool — or one that's poor or unused.

Quick test: "Could you do this well in 30 minutes?"

No, wouldn't know the steps → P. No, the habit isn't there → B. No, nothing to do it with → T."

Top three gaps per table → the Gap Wall

- 1 Add what's missing — especially where groups do the same thing differently.
- 2 Each table picks its top items — the ones that cost the most: rework, blown fees, a client's trust.
- 3 Stack rank those cards with most impactful first to least impactful last.
- 4 This becomes our master list of gaps to close in this training.

Every priority gap leaves with a name

B

Behavior gaps (B)

Owned by the program automatically — the skills the 16 weeks build.

P

Process / tool you can influence

Who in this room would like to help codify the missing process?

T

Firm-level process / tool

Who in this room would like to help identify the tool to help drive consistency?

Non-negotiable: no priority gap leaves blank. Firm-level with no owner → “program to assign within [X] days.”



Lunch

“Design that Defines. Impact that Endures.”

Run the Lifecycle — how to play

- 1 **Round 1 · The spine**
- 2 **Round 2 · Place it** — six responsibilities; for each, which phase it lives in and which behavior it serves.
- 3 **Round 3 · Name the gap** — four scenarios; for each, the missing behavior and its cause (P / B / T).
- 4 **Score it** — swap sheets with another table, mark against the answers I reveal, and we crown a table.

Run the Lifecycle — how to play

Set up your answer sheet.

Phases – Behaviors	
Responsibilities – Behaviors	
1	4
2	5
3	6
Behavior – Cause	
1	3
2	4

PART 1

The spine, then place it

ROUND 1

From memory: the five phases in order, then the three behaviors. Heads down — no peeking.

ROUND 2

For each responsibility — which phase? which behavior?

1

Lock scope, fee, and the single decision-maker before the team starts.

2

Price the proposal to the real scope — don't buy the work with a low fee.

3

Pull the SME in early; hold the quality gate before it ships.

4

Check burn against earned progress every week — act on drift now.

5

Re-baseline the schedule and staffing when the design scope grows.

6

Run the closeout review and capture lessons before releasing the team.

PART 2

Name the gap

ROUND 3

For each scenario — what behavior is missing, and is the cause Process, Behavior, or Tool (P / B / T)?

- 1 Three weeks in, the team's deep in design — but no one ever confirmed who signs off, and the client just changed direction.
- 2 The monthly report shows the project 20% over budget. It's the first anyone has heard of it.
- 3 Under deadline pressure, the team skipped the SME review and sent it out. The client caught an error that should've been caught inside.
- 4 Two teams each assumed the other was tracking the consultant's submittals. The deliverable slipped two weeks.

The spine, then place it — keyed

ROUND 1 · The spine

Pursuit → Initiation → Design → Construction Administration → Closeout

Behaviors: Establish Clarity · Control Advancement · Protect Integrity

ROUND 2 · Place it

- 1

Initiation · Establish Clarity
- 2

Pursuit · Establish Clarity
- 3

Design · Protect Integrity
- 4

Design / CA · Control Advancement
- 5

Design · Control Advancement
- 6

Closeout · Protect Integrity

Name the gap — keyed

ROUND 3 · missing behavior · cause (P / B / T)

- 1 **Establish Clarity** · cause: **Behavior** (B)

the means existed; the decision-maker was never pinned.

- 2 **Control Advancement** · cause: **Process** (P)

no weekly burn-vs-progress rhythm — it surfaced at the monthly review.

- 3 **Protect Integrity** · cause: **Behavior** (B)

under pressure, the gate wasn't held.

- 4 **Control Advancement** · cause: **Tool** (T)

no shared deliverable tracker, so ownership fell through.



Why the PM Owns the Numbers

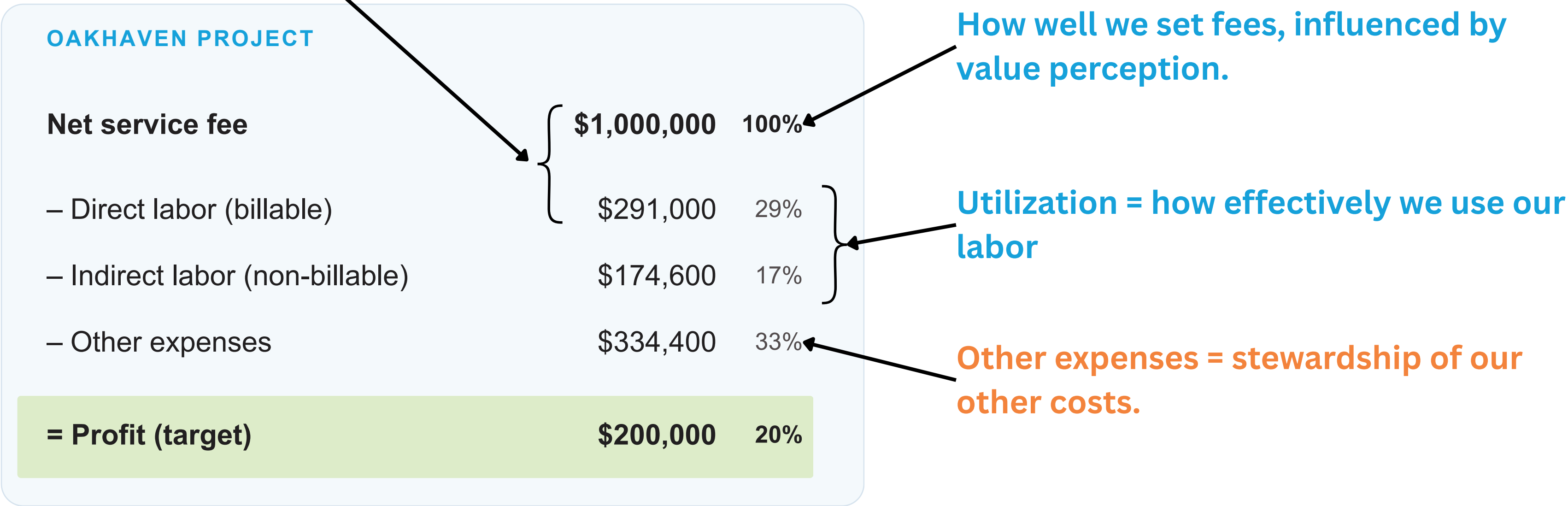
How your behaviors and decisions drive financial performance for the firm.

“Design that Defines. Impact that Endures.”

Your behaviors land on the income statement

Oakhaven — a \$1M net fee. The same three levers, now in dollars.

How efficiently labor converts to revenue.



Grace model: utilization 62.5% · overhead factor 1.75 · direct-labor multiplier 3.44 · 20% target. The real math is Modules 2 & 3.

Your behaviors land on the income statement

Oakhaven — a \$1M net fee. The same three levers, now in dollars.

OAKHAVEN PROJECT

Net service fee	\$1,000,000	100%
– Direct labor (billable)	\$291,000	29%
– Indirect labor (non-billable)	\$174,600	17%
– Other expenses	\$334,400	33%
= Profit (target)	\$200,000	20%

How you move these numbers

- 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 labor is utilization — Grace 62.5%. Your who-does-what moves it.
- Protect Integrity → the labor line too**
A missed quality gate means rework — billable hours spent twice.

Grace model: utilization 62.5% · overhead factor 1.75 · direct-labor multiplier 3.44 · 20% target. The real math is Modules 2 & 3.

Three levers set firm performance — you steer two

Concept only — the real math is Modules 2 & 3. Today, just see where your grip is.

Better fees

The ceiling on what a project can earn — and the pool we pay every bill from and profit on.

You shape this

Labor efficiency

Multiplier — how efficiently labor creates revenue. Your who-does-what calls move it.

You drive this

Everything else

Overhead — running in the background. The lever you touch least, but worth knowing it's there.

Mostly not yours

Two of the three — in everything you do, every day.

With a neighbor: where is the business result most at risk right now?

- 1 Use your throughline project (or the sample). Pairs, not full tables.
- 2 On your feet — stand when I name the lever that's slipping on your project. No number needed.
- 3 Bridge: the mechanics — actual numbers and tools — are Modules 2 & 3.
- 4 No role moves firm performance more than yours. So if you don't own the business result — who does?



Throughline project setup

The project you framed in prework — your practice ground for the whole program.

“Design that Defines. Impact that Endures.”

Frame the one real project you'll carry through every module

- 1 Open your prework Sheet 1 — fee, burn, schedule, team already captured.
- 2 Turn to your neighbor and give them the “State of the Union” of your project, based on what you know today.
- 3 Neighbor: Pressure-test it. Ask your partner questions to prove to you that they are in control today, or help them identify where they made need better clarity, control, or protection.
- 4 Sharpen the one open decision and the least-clear behavior.

Sharpen — don't solve

Trade prework sheets / templates with a neighbor. Help your neighbor clarify and solidify the gaps in their current project. **Push on two things only.**

Is the open decision specific enough to act on?

- “Price the scope add or not” beats “manage scope.”

Is the weak spot named honestly?

- Where it's least clear — tagged to a real behavior.
- Bridge: this project is your lab — and the next block's goals hang on it.



Goals + peer pods

Turn today into commitments that stick — goals tied to a behavior and your project, with a pod to hold them.

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Write 2–3 goals using the stems

- 1 Each goal ties to one behavior AND to your throughline project.
- 2 Specific enough to be a Scorecard line.
- 3 “Review burn weekly on Riverside” — not “be more financially aware.”

Join your pod. Sharpen each other. Wire it to the Scorecard.

- 1 Identify a peer pod — 3–4 people, cross-discipline, standing for the whole program.
- 2 Each person shares their goals; the pod pushes each one sharper.
- 3 Each committed goal becomes a line on your Scorecard.
- 4 Your pod sets its first check-in against the next module milestone.



Close: how the 16 weeks run + commitments

See how the program runs — then make one commitment out loud. That's what turns today into change.

"Design that Defines. Impact that Endures."

What happens next — concretely

1

Async modules

Self-paced, module by module — tools that support the three behaviors.

2

Pod check-ins

Your pod meets at mapped module milestones.
Weeks 4, 8, 12

3

Scorecard reviews

Your goal-lines get reviewed as you go.

4

Onsite #2 capstone

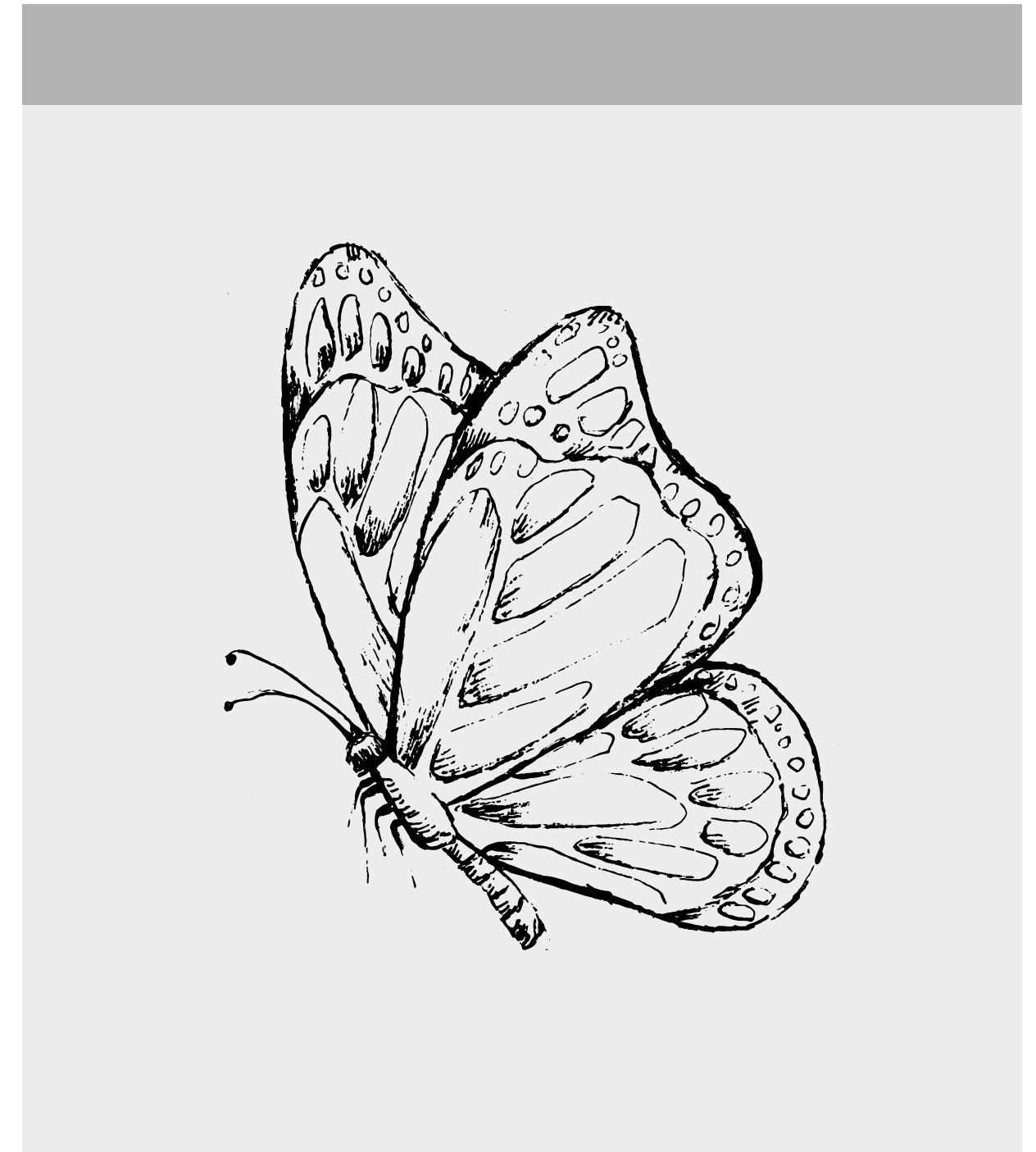
It all comes back together — and the baseline repeats.

“Draw me a Grace Project Manager.”

On one Flip Chart Page, draw an illustration that captures the ideal Grace Project Manager.

Your illustration must:

1. Be a visual representation of the Project Managers we want to build and become at Grace.
2. Include one visual cue each for Clarity - Advancement - Integrity.
3. One written commitment (per person) that each person in your group makes to the group regarding their participation over the next 16 weeks.



WHERE IT STARTS

“Design that Defines. Impact that Endures.”

See you in the modules — and at the capstone.