

Onsite #1 — Kickoff

Participant Workbook

Design that Defines. Impact that Endures.

NAME

TABLE #

OFFICE / FIRM

VALIDATOR AT MY TABLE

A workbook to DO, not read. Sheet 1 you fill in BEFORE you arrive. Sheet 2 you fill in the room. Bring it to every module.



THE STANDARD YOU'LL BUILD · keep this open all day

PM excellence reduces to three Core Behaviors that run across every stage and serve three streams of value.

Three Core Behaviors

I



Establish Clarity

Refuse to let the team start until the finish line is defined — scope, fee, and one client decision-maker settled first.

II



Control Advancement

Look at burn and schedule every week and act on drift the same week — not at the monthly review.

III



Protect Integrity

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

Three Streams of Value



CONFIDENCE

Client Experience



PEOPLE

Team Leadership



RESULT

Business Management

The cause lens — P / B / T

When a responsibility doesn't happen consistently, that's a gap. Every gap has one primary cause:



P Process

No clear, agreed way to do it. People improvise, or it falls through the cracks.



B Behavior

The way exists, but the skill or habit isn't there. This is what the program builds.



T Tool

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

 **NOTES** — questions, ideas, things to bring up



COME READY · fill this in before Onsite #1

Twenty minutes at your desk now saves the room hours. Bring real numbers — you'll steer this same project through all twelve modules.

1 Your throughline project

The ONE real project you'll carry through the whole program.

Project name · type · your role · phase / where it stands today

Fee

Burn / spent to date

Schedule status

Team size

2 The ONE open decision you can't currently make

Be specific. "Price the scope add or not" beats "manage scope."

3 Where this project is LEAST clear — circle the behavior



Establish Clarity



Control Advancement



Protect Integrity

4 Two projects from your past

One line each. You'll share these in the warm-up; the best feeds the behaviors, the worst feeds the gap wall.



My BEST project — and the one thing that made it soar



My WORST project — and the one thing that made it sink

NOTES



IN THE ROOM · the role & the gaps

Block 1 — Sort the roles, discover the behaviors

Sort the Responsibility Cards by phase. Dab the GAP box on any card you don't do consistently — then after lunch, diagnose the cause (P/B/T) and name an owner.

Responsibilities I OWN but don't do consistently

Responsibility (gap-flagged)	Phase	Cause P/B/T	Owner

Cause filled in during the Gap & Tool block. B (behavior) gaps route into the program automatically.

The strongest behavior per phase — my table's #1 to the wall

Pursuit / Capture	
Pre-Design / Setup	
Design / Documentation	
Bidding / Procurement	
Construction / Close-out	



The discovery: the room's behaviors cluster into three —
I Establish Clarity · II Control Advancement · III Protect Integrity.



The one gap I will personally own

A process/tool gap you can influence — self-assign it. Behavior gaps, the program owns with you.



NOTES

P

Tie

Goal	Behavior (I/III/III)	Tied to	Definition of Done / Proof

Sta

Name	Office / Firm	Contact (email / phone)

Our

A g

Tur