

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
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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.
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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. No project to bring? Use the Riverside sample packet as yours.

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

I Establish Clarity

II Control Advancement

III 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 · goals, pod & commitment

📋 My goals (2-3) — written now, after the day's work

Tie each to one behavior + your project. Scorecard-specific: "review burn weekly on Riverside," not "be more financially aware."

Goal	Behavior (I/II/III)	Tied to

👥 My peer pod — 3-4 people, cross-office

Standing for the whole program. Get names, offices, and how to reach each other; set the first check-in.

Name	Office / Firm	Contact (email / phone)

Our first check-in (date / module milestone)



MY ONSITE #1 COMMITMENT

A good day becomes changed behavior only when it's spoken out loud to people who will hold you to it. Turn one goal above into a single, ownable commitment — then state it to your pod.

I commit to...

