pax8 | Academy

Starting Your Project Practice

Syllabus

Training Overview

This training Is designed specifically for emerging Managed Service Providers (MSPs). In this training, you will learn the fundamentals of project management and understand its importance, even for small projects. Participants will discover how to define and manage projects within an MSP framework, covering key topics such as defining a project, understanding professional services, and distinguishing between service, implementation, and project work.

This training will emphasize the importance of clear definitions for consistency, process, staffing, and billing. Additionally, participants will explore leadership skills under the PMI framework, including communication, team dynamics, and crisis management.

This training is designed for:

- **MSP Owners and Service Managers who are ready to start a project practice**

Training Inclusions

- **4-hours of virtual, interactive content taught by an expert instructor with MSP expertise**
- **Downloadable videos* of the content you can watch on-demand at your convenience**
- **Downloadable slide decks, handouts and resources**

Learning Objectives

Partners attending this training will learn how to:

- **Organize and monitor small projects effectively, ensuring that all tasks are clearly defined and progress is easily tracked**
- **Improve accountability within their teams without adding unnecessary layers of bureaucracy, maintaining a streamlined and efficient project management process**
- **Link project work to financial outcomes to see the direct impact of projects on profitability**
- **Prepare project management practices for future growth, ensuring scalability as the company grows**

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* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend trainings live to receive the full benefits of interactive Q&A with the instructor and class participants.

Training Topics

Session 1: Foundations of a Project Practice

- **Understand why project management matters for small MSPs, including defining projects and the mindset shift from reactive to proactive work**

- **Define ownership and roles in low-headcount environments, establish technician accountability, and build a culture of visibility and communication**

Session 2: Service Offerings and Revenue Streams

- **Create clarity in project offerings, define standard offerings, and reduce scoping ambiguity through standardization**

- **Understand how project work contributes financially, separating project revenue from tickets and creating a basic profit center model**

Session 3: Learning Staffing and Scoping Best Practices

- **Efficiently use available resources and scope projects to avoid rework, missed expectations, or margin erosion**

Session 4: Costing, Pricing, and Schedule Management

- **Set pricing that protects margin and reflects effort, as well as build/manage a realistic project schedule**

Meet the Instructor

Josh Moree

Senior Executive Coach

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- **1-5 employees**
- **6-25 employees**
- **26-50 employees**
- **51+ employees**