

# Streamlined Project Planning Essentials



✉ [hello@output.training](mailto:hello@output.training)

☎ (844) 3OUTPUT

## Course Description

Running projects in a small or medium business often feels harder than it should. This course takes the mystery out of project management by showing you how to plan, track, and deliver projects without unnecessary complexity. You'll learn the basics of Waterfall and Agile, then see how to adapt them into a lightweight "PM Lite" approach designed for tech and service teams. By the end of the day, you'll have a repeatable process that keeps projects on time, on budget, and moving forward smoothly.

### Learning Tracks

Digital Transformation

AI

Call Flows & Routing

UCaaS

Productivity

Automation



## Why This Course Matters

- Focus on simple easy-to-implement tools and practices that streamline project workflows.
- Time is a critical limited resource, simple tools and considerations adopted by any staff member can help contribute to the end goals.
- Clear communication ensures everyone involved understands project goals, progress, and expectations.

## Who Should Attend

Register Now



Staff  
coordinating  
project work



Department  
managers



Project  
coordinators

# COURSE SYLLABUS

## Course Overview

This course simplifies project management for tech and service teams, offering a lightweight approach to keep projects on track and within budget.

## Syllabus

1. Project Management & Key Terms
2. Introduction to Project Management
3. Waterfall Methodology
4. Agile Methodology
5. PM Lite Frameworks
6. Planning & Organizing
7. Managing Risks & Communications
8. Project Closure & Lessons Learned

## What You'll Learn

- 1 Understand basic project management terms & concepts
- 2 How Waterfall and Agile methods work
- 3 Set realistic goals, budgets, & timelines
- 4 Managing risks and scope changes
- 5 Effective project communications

**Register Now**



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