November 2025

Stakeholder Engagement

Study Group Session Event Input



EVENT DESCRIPTION

- German: "Stakeholder" ist der wohl verwirrendste Begriff im Projektmanagement. In der Präsentation besprechen wir die verschiedenen Bedeutungen des Begriffs und wie man damit in der Prüfung umgeht. Außerdem sprechen wir darüber, wie man "Stakeholder Engagement" im Projekt macht.
- ◆ English: "Stakeholder" is probably the most confusing term in project management. In the presentation, we will discuss the different meanings of the term and how to deal with it in the exam. We also talk about how to do "stakeholder engagement" in the project.

AGENDA

GERMAN:

- Einleitung und Begriffsklärung
- Analysiere deine Stakeholder wie ein Profi
- ◆ Kategorisiere deine Stakeholder für den strategischen Fokus
- Stakeholder-Engagement basierend auf dem Stakeholder-Typ
- Fragen und Antworten

ENGLISH:

- **♦** Introduction
- Analyze your stakeholders like a Pro
- Categorize your stakeholders for strategic focus
- Engage your stakeholders based on stakeholder type
- Questions and answers

DIFFERENT PLACES IN THE PMP® EXAM CONTENT OUTLINE WITH FOCUS ON STAKEHOLDERS

- ◆ Domain II Task 4 Engage Stakeholders
 - Analyze stakeholders (e.g., power interest grid, influence, impact)
 - Categorize stakeholders
 - Engage stakeholders by category
 - Develop, execute, and validate a strategy for stakeholder engagement
- ◆ Domain I Task 9 Collaborate with Stakeholders
 - Evaluate engagement needs for stakeholders
 - Optimize alignment between stakeholder needs, expectations, and project objectives
 - Build trust and influence stakeholders to accomplish project objectives
- Basically, focusing on stakeholders is relevant for all aspects of project management



Identify and Engage Stakeholders TOPIC A



Stakeholder and Communications Management Overview

- Stakeholder register
- Stakeholder engagement plan
- Communications management plan
- Stakeholder engagement assessment matrix (SEAM)
- Assessment grids / matrices / models





DOMAIN II - PROCESS

TASK 4 - ENGAGE STAKEHOLDERS

ENABLERS

- ◆ Analyze stakeholders (e.g., power interest grid, influence, impact)
- Categorize stakeholders
- Engage stakeholders by category
- ◆ Develop, execute, and validate a strategy for stakeholder engagement





WHAT ARE STAKEHOLDERS?

Stakeholder* An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.

- Stakeholder's interests may be positively or negatively affected by a project.
- Stakeholders can be:
 - Active: Directly involved or participating in the project
 - Passive: Affected or influenced by the project.
- Stakeholders can be:
 - Internal: Part of the performing organization
 - External: Outside the performing organization.

The stakeholders' role on a project is determined by the Project Manager and the project stakeholders.

Stakeholders should be involved in

Stakeholders should be involved in planning the project and engaging them should be more extensive than many Project Managers do on their projects.



Typical Project Stakeholders*



Can you categorize these stakeholders?

- Which are typically project team members?Which are not?
- Which are typically active in project work?

- End users
- Customers
- Employees
- Organization
- Managers

- Sponsors
- Business partners
- Suppliers and contractors
- Government
- Community







WHO ARE STAKEHOLDERS?

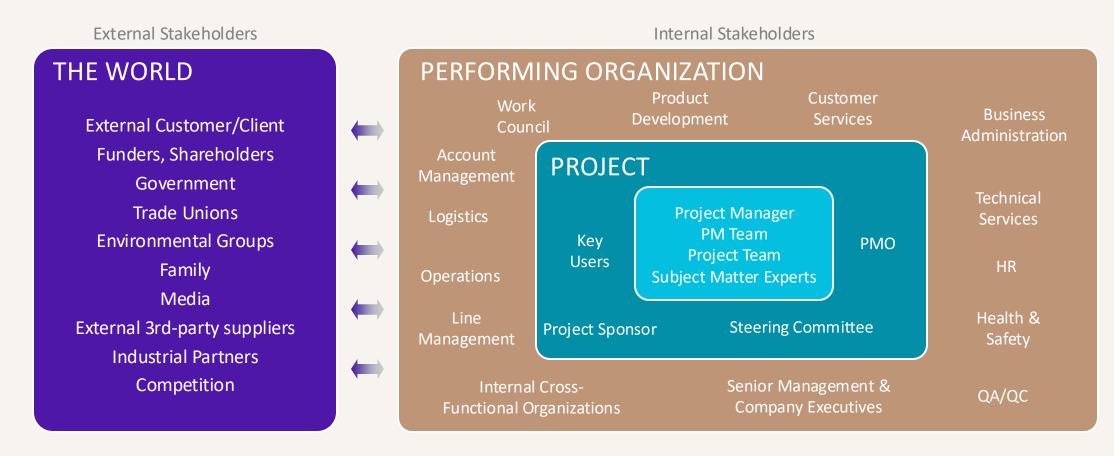


Figure 13-5: Internal and external Stakeholders

Stakeholder Identification

Who are they?

- Check the business case and benefits management plan for names
- Later, check the issue/impediments log, change log or requirements
 documents to see who else is needed or named

What's their relationship to the project?

- Interest
- Involvement
- Interdependencies
- Influence
- Potential impact on project success

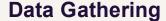


Identify and engage stakeholders early to avoid surprises later in the project!



Assess Stakeholders





- Questionnaires and surveys
- Brainstorming

Data Analysis

- Stakeholder analysis What are their "stakes" in the project? i.e., interest, rights, ownership, knowledge, contribution
- Document analysis

Data Representation

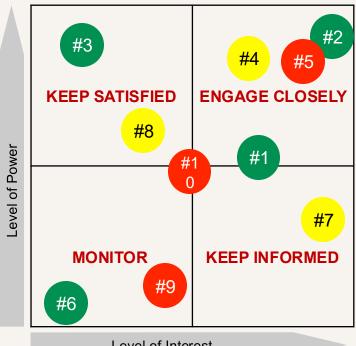
- Two-dimensional (2D) grids
 - Power/interest
 - Power/influence
 - Impact/influence
- 3D grid Stakeholder "cube"
- Salience model
- Directions of influence



IDENTIFY STAKEHOLDERS

INCLUDES STAKEHOLDER ANALYSES BY POWER GRIDS:

- **◆** Power/Interest Grid,
- ◆ Power/Influence Grid, or
- ◆ Impact/Influence Grid
 - Authority (power)
 - Interest of the stakeholder in the project (can be positive or negative!)
 - Ability to influence the outcomes (if they use their power).



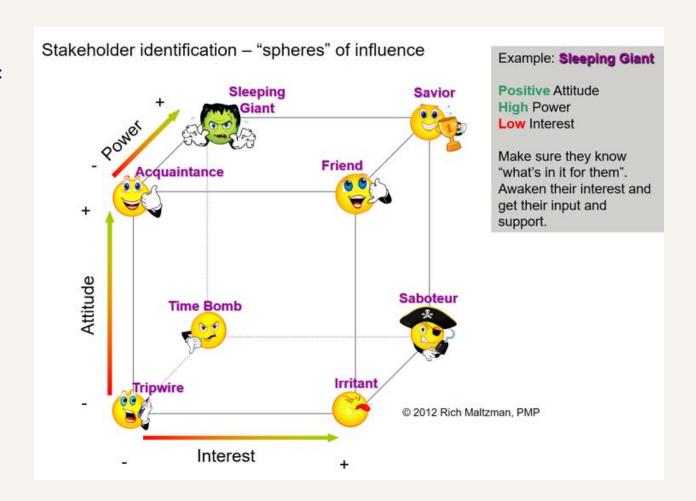
Level of Interest

- Expected attitude to project positive
- Expected attitude to project neutral
- Expected attitude to project negative

IDENTIFY STAKEHOLDERS

STAKEHOLDER CUBE

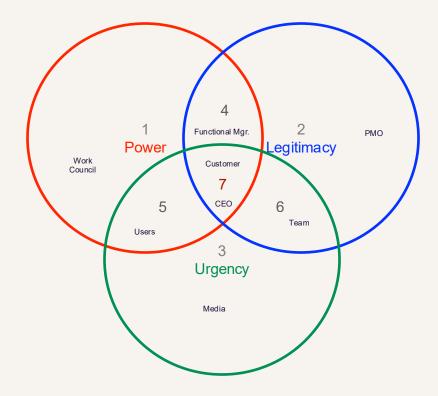
- ◆ A three-dimensional model mapping of stakeholders as to:
 - Interest (active or passive)
 - Power (influential or insignificant)
 - Attitude (backer or blocker).



IDENTIFY STAKEHOLDERS

SALIENCE MODEL

- **♦** Classes of stakeholders based on:
 - Power (level of authority or ability to influence the outcomes)
 - Urgency (need for immediate attention)
 - Legitimacy (their involvement is appropriate).
- 3-field Venn diagram
- ◆ Salience model is useful for
 - large complex communities of stakeholders
 - or where there are complex networks of relationships within the community
 - in determining the relative importance of the identified stakeholders.



Level 3 (High Priority)	7 - Definitive Power, Legitimacy & Urgency				
Level 2	4 – Dominant	5 - Dangerous	6 – Dependent		
(Medium Priority)	Power & Legitimacy	Power & Urgency	Legitimacy & Urgency		
Level 1	1 – Dormant	2 – Discretionary	3 – Demanding		
(Low Priority)	Power	Legitimacy	Urgency		

FORCE FIELD ANALYSIS

STEP 1: DESCRIBE YOUR PLAN OR PROPOSAL FOR CHANGE

◆ Define goal or vision for change, write it down in the middle of the page.

STEP 2: IDENTIFY FORCES FOR CHANGE

• Forces that are driving change. Can be internal and external.

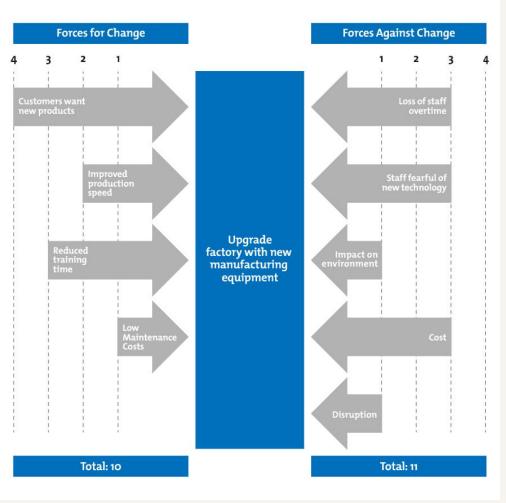
STEP 3: IDENTIFY FORCES AGAINST CHANGE

Brainstorm forces that resist or are unfavorable to change.

STEP 4: ASSIGN SCORES

- Score each force from one (weak) to four (strong), according to the degree of ir
- ◆ Add up the scores for each side (for and against).

STEP 5: ANALYZE AND DECIDE



Directions of Influence

CS.

You should understand the social network of project stakeholders, specifically the direction of their influence on the project.

Upward	Parent organization — senior management (business, financial interests)				
Downward	In the project hierarchy — team or specialists				
Outward	Have a "stake" in the project — client, end-user, external				
Sideward	Friendly or competitive for resources — project manager's peers, other organizational departments				



Create the Stakeholder Register

- Capture and record important stakeholder information
- Factor in OPAs
- Update it! Describe the evolving relationship with stakeholders throughout the project



Contains the information necessary to execute the stakeholder engagement plan



- Refer to stakeholder registers from previous, similar projects for help
- Remember this is a public document, so ensure the information presented is appropriate





Stakeholder Register



	Name	Title	Internal / External	Project Role	Major Requirements	Expectations	Influence / Attitude
1	Eugene Lowe	CEO	Internal	Sponsor	Successful completion	On-time completion, successful partnerships	Champion
2	Oasestown Municipality		External	Government partner (liaison); funding contributor; owner of SLC site	Successful completion of facility and partnership;	Accountability	Supporter
3	Kara Black	Principal, Oases Architects	External	Partner, designer, specialist knowledge (conservation building)	Clear design brief, successful partnership	Fluid funding and communication, design autonomy	Champion
4	Josie Bynoe	Chair, BOD	Internal	Direct strategic local partnerships for Shawpe	Environmental sustainability of project work; "moral rights"	No damage to Oasestown conservation district or environs	Resistor
5	Helen Grey	Lead, business development	Internal	Product owner	High profile tenants, excellent community and conservation credentials	Organizational learning; leadership opportunity	Neutral
6	Hasan Persaud	VP of Business Development	Internal	Portfolio owner	Capacity for ongoing revenue	End-user in Phase 3	Neutral
7	Mandeep Chahal	VP of Finance	Internal	Budget controller	direct contact with funding partners	clear data	Neutral
8	Kei Leung	VP of Marketing	Internal	Marketing expert	elevation of brand	high quality tenants	Supporter
9	Tenants		External	Income source	bespoke spaces	high quality	Neutral
10	Contractors		External	Vendors - building	clear instructions, contract		Neutral
11	Oasestown local residents		External	Neighbors to project	Traffic and noise pollution management	no inconveniences	Resistor
12	Oasestown Community Partnership		External	Community group operating in Oasestown	none	a free space in the SLC	Champion



Stakeholder Perceptions

- Must be holistically understood in customer-centric project management approaches
- Can be damaging to a project, whether they are negative or positive



Why do you think it's important to understand both positive and negative stakeholder perceptions of your project?



Capture Stakeholder Feedback and Perceptions



- Interpersonal skills
- Active listening
- Emotional intelligence
- Effective communication methods



Key stakeholders

 Interview to understand project requirements and vision and communication preferences



All stakeholders

Appropriate, regular project communications



Large and public groups

- Questionnaires/surveys
- Facilitated conversations/sessions online or in person
- Digital media email campaigns, websites, group chats
- · Posters and advertising



Plan to Communicate with Stakeholders

Stakeholder engagement plan identifies required management strategies to effectively engage stakeholders.

Team fulfills strategies via communications described in the communications management plan.





STAKEHOLDER ENGAGEMENT PLAN

Stakeholder engagement plan* A component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in project or program decision making and execution.

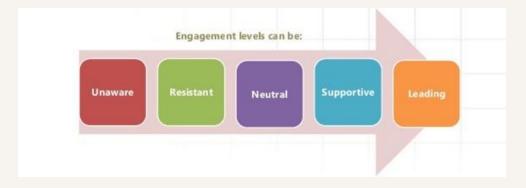
- Definition of Stakeholder Register
- Assumptions and constraints (sensitivities)
- Impact project on stakeholders
- Key stakeholders + current & desired engagement levels
- Relationships between stakeholders
- Communications requirements
- Reasons for the communication + expected impact
- Time/date of sending + how often
- How to update/refine this plan.



STAKEHOLDER ENGAGEMENT ASSESSMENT MATRIX

STAKEHOLDER ENGAGEMENT ASSESSMENT MATRIX WITH ENGAGEMENT LEVELS:

- ◆ Leading: actively engaged in ensuring that the project is a success → Strategic support
- ◆ Supportive of the work and its outcomes → Operational support
- ♦ Neutral
- ◆ Resistant to change
- **♦** Unaware



Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
John	С			D	
Paul		С	D		
George				C/D	
Ringo				С	D

C = Current D = Desired

Communication Requirements Analysis



- Leads to a clear articulation of the stakeholders' communications needs
- Enables effective choices about communication topics, frequency, models and technologies
- Output is a grid, questionnaire or survey that documents the communication and technology requirements for each stakeholder

Communication: Methods and Technologies



Do you use any other communication methods or techniques on your projects?

Are there types your organization does not allow? Why?

Meetings/verbal

- Physical (face to face)
- Virtual (videoconferencing)
- Phone call

Digital/electronic media

- Websites and social media
- Instant/text messaging via phone or platform
- Email or fax

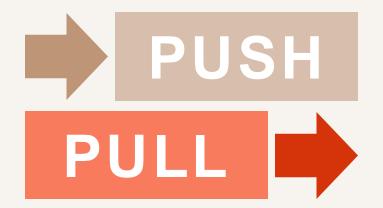
Physical

- Body language and gestures
- White boards



Communication Methods





Push — sender determines:

- Send an email
- Make a phone call

Pull — receiver determines:

- Post information on team board
- Store reference documents in electronic repository — e.g., SharePoint



- Conversation (speaking on the phone, virtual, in-person)
- Messaging
- Workshops/collaboration
- Whiteboarding

Agile teams are colocated whenever possible so that they can be highly collaborative.



Communication Challenges / Considerations



- Urgency of need for information
- Availability and reliability of technology
- Ease of use
- Project environment e.g., language and formality
- Sensitivity and confidentiality of information
- Communications OPAs e.g., social media protocols
- Data protection laws/regulations
- Accessibility requirements

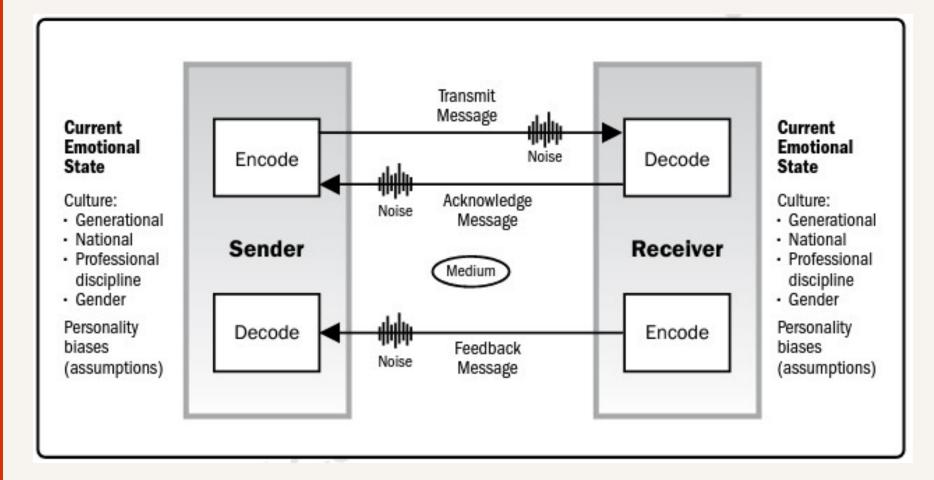


Communication Model*



Think of an example of a transmission. Depending on the method, what kinds of noise can play a part?

Cross-Cultural Communication Model



Stakeholder Engagement Strategy

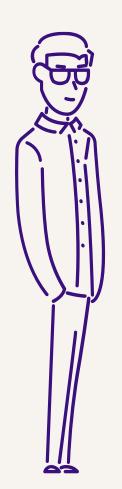


- Involve stakeholders
- Enable appropriate management strategies
- Create and maintain relationships





Example Stakeholder Engagement Assessment Matrix (SEAM)





Tailor labels for stakeholder levels of engagement to your context, team or organization.

Don't use names on the matrix – refer to stakeholders by number.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
1				D	С
2				С	D
3			С	D	
4			С	D	
5		С	D		
6				С	D

C – Current engagement level | **D** – Desired engagement level

TASK 9 – STAKEHOLDER COLLABORATION

TAKING CARE OF STAKEHOLDERS

PRINCIPLES OF STAKEHOLDER ENGAGEMENT

- Get the right stakeholders Identify stakeholders
- Stakeholder mapping Analyze stakeholders
- Understand stakeholder's needs, expectations, and concerns, they may change during the project!
- ◆ Emphasize stakeholder involvement Define an appropriate stakeholder engagement strategy
- Actively manage stakeholder interest Keep stakeholders engaged
- Frequently discuss what "done" looks like
- Show progress and capabilities
- Candidly discuss estimates and projections
- Change is challenging for all affected
- Communication and education are vital
- Stakeholders are the key to spotting change early
- ◆ Most agile events like e.g. Sprint Planning and Sprint Review are stakeholder interaction events

TASK 9 – STAKEHOLDER COLLABORATION

TAKING CARE OF STAKEHOLDERS

STAKEHOLDER STEWARDSHIP VS. STAKEHOLDER MANAGEMENT

- Managing people means telling them "what to do"
- Stewardship means safeguarding and looking after everyone on the project to make sure they have everything they need to succeed

EDUCATING STAKEHOLDERS ABOUT AGILE

- Executives and project sponsors feel concerned about the risk of project failure. Agile approaches provide short feedback loops for preventing failure
- Managers may feel loss of control when projects assume agile approaches
- Development team may resist against agile approaches as the feel enforced for that by management
- User community is worried about not getting all the features they want or that early iterations result in poor quality deliverables
- Supporting groups may be concerned about lack of control, continual requests for involvement and unclear end points

KEEPING STAKEHOLDERS ENGAGED

- Continuous stakeholder engagement prevents stakeholders from losing interest
- Ongoing dialogue helps identify changes, potential risks, defects and issues as soon as possible
- Scrum Master, agile project manager or others need to use interpersonal skills (e.g. emotional intelligence) to understand stakeholders' concerns
- Establish a process for escalating issues with a need for high level authority to resolve and communicate this with stakeholders

INCORPORATE STAKEHOLDER VALUES

◆ Do not plan or initiate work that does not support value currently

♦ How:

- Product Owner to prioritize the backlog and Team to execute the work according customer's priorities
- Invite stakeholders to planning meetings, reviews and sometimes – to retrospectives

TASK 9 – STAKEHOLDER COLLABORATION

COLLABORATION ACTIVITIES

- Stakeholders collaborate daily in a project.
- Frequency of engagement is based on mutual needs and expectation.
- Constant engagement is often important.
- ◆ Activities that encourage regular collaboration include:
 - Daily stand-up meetings
 - Co-locating teams for face-to-face communication
 - Scheduled sessions, such as iteration reviews, backlog refinement sessions, and project update meetings
- Determining and optimizing collaboration activities is an ongoing team effort spearheaded by the project manager.

SAMPLE QUESTIONS

1. During an agile project, key stakeholders are expressing concerns about their lack of involvement. They feel disconnected from the project. The product owner agrees with these concerns and wishes to do something quickly. The iteration is coming to an end.

What would be a good way to engage the key stakeholders at this stage?

- A) Arrange the daily stand-up on video, so all stakeholders can join the meeting.
- B) Arrange a meeting with the key stakeholders to discuss the iteration backlog.
- C) Invite the key stakeholders to join the next iteration planning meeting and the retrospective.
- D) Invite the key stakeholders to participate in the iteration review.

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The best approach is to invite the stakeholders to take part in the review, as the iteration is almost completed. This is themost direct and appropriate option to involve the stakeholders.

SAMPLE QUESTIONS

2. A critical project to improve a customer service process has failed. Even though all the end users were trained on the newservice, they rejected the change and continued using their original process.

Which of the following actions should the team take?

- A) Escalate the lack of cooperation to the end users' functional manager.
- B) Take note of the risks associated with the new implementation.
- C) Engage the end user community and try to understand their concerns.
- D) Repackage and execute the original plan.

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This team needs to understand customer needs and desires better. Their cooperation and buy-in to this critical project are the most important success factors. The risk of stakeholder rejection should already have been noted! It is too late for that risk to be managed now. Escalation is an over-reaction, and repackaging the original plan will cause the same problems to reoccur.

SAMPLE QUESTIONS

3. A project manager shifts to an agile approach for a project with an aggressive go-to-market timeline. The project manager needs to revise the stakeholder engagement plan so that it follows agile principles.

Which action should the project manager take?

- A) Increase the number of formal training workshops to cover all relevant issues for all stakeholders, including the project sponsor and client.
- B) Increase the number of stakeholder communication channels.
- C) Make standup meetings mandatory for all key stakeholders
- D) Update the stakeholder engagement matrix.

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The stakeholder engagement matrix needs updating in this case, specifically how the stakeholders are engaged. All of the other answers create complexity. Agile includes the ability of stakeholders and team members to have direct access to each other to improve communication, values transparency, and strips away unnecessary layers or formalities.

SAMPLE QUESTIONS

- 4. A project has the following characteristics:
- A functional manager is also a project stakeholder.
- The functional manager has time constraints and delegates project responsibilities to someone else on the functional team. This person becomes a new stakeholder.
- The new stakeholder is NOT attending meetings.

How should the project manager engage this new stakeholder?

- A) Examine the stakeholder engagement plan with the new stakeholder and assess their level of engagement.
- B) Present the project schedule and the specific, assigned tasks to the new stakeholder.
- C) Request that the functional manager brief this new stakeholder and ask that they send them to all relevant meetings.
- D) Ask the new stakeholder to pair with a more experienced stakeholder to learn responsibilities.

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The first version of the stakeholder engagement plan is developed after the initial stakeholder community has been identified by the Identify Stakeholder process. The stakeholder engagement plan is updated regularly to reflect changes to the stakeholder community.

SAMPLE QUESTIONS

5. A project manager is working with three (3) key stakeholders. Each has a different vision regarding the project and its goal. They each feel strongly about their opinion.

How should the project manager obtain approval of the project charter?

- A) Conduct a stakeholder analysis.
- B) Use facilitation and conflict management techniques to help the three (3) stakeholders find consensus.
- C) Request that the project sponsor resolve the conflict.
- D) Use the project kick-off meeting to settle the project goals.

SAMPLE QUESTIONS

5. A project manager is working with three (3) key stakeholders. Each has a different vision regarding the project and its goal. They each feel strongly about their opinion.

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To facilitate timely, productive discussion and decision making, the project manager should use their facilitation skills as well as conflict management to help the stakeholders agree on a shared vision of the project goals.

SAMPLE QUESTIONS

6. Project manager A identifies three critical risks with probability of a high impact on the schedule and budget of project A—this project is producing critical deliverables for the company.

The team meets to devise a solution for the risks and decides that three specific resources will be required to address the risks. However, these resources are already committed to a separate project, which is managed by project manager B.

Which party should the project manager work with first to find a solution?

- A) The project team members to assist in training the new team members quickly so they can complete work on time.
- B) The project sponsor to request more funding for the budget in order to hire contractors
- C) The three resources to convince them to join the team or, at least, agree to coach the existing team.
- D) Project manager B to negotiate reallocation or sharing of the three required resources.

SAMPLE QUESTIONS

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- D) Project manager B to negotiate reallocation or sharing of the three required resources.

Project manager B has the authority to reschedule or reallocate the resources, once it will NOT jeopardize project B. Going directly to the resources themselves undermines the functional manager, so this is unethical. The resources have been identified as the solution to the problem, so it is best to attempt to make this solution work first. The other options of the project sponsor and working withproject team members would be secondary and tertiary options which would probably NOT work as well.

SAMPLE QUESTIONS

7. The project sponsor is NOT convinced that an agile track should be used in a new R&D project because the company needs to be certain that specific features will be ready for mass production by a specific date.

Which three agile methods can ensure that the sponsor's needs can be fulfilled in a hybrid project approach? (Choose THREE.)

- A) A product roadmap can provide a detailed breakdown.
- B) Requirement priorities are confirmed at each iteration.
- C) Incremental development reduces risk of quality delays
- D) Impact mapping can be used to group related stories.
- E) Stories can be broken down into granular epics

SAMPLE QUESTIONS

7. The project sponsor is NOT convinced that an agile track should be used in a new R&D project because the company needs to be certain that specific features will be ready for mass production by a specific date.

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Valid agile methods to secure on-time delivery include backlog reprioritization at every sprint, impact mapping for feature-level view, and incremental development to secure progressive development. Roadmaps and epics are high-level, NOT detailed views—so these will NOT work.

ECO Coverage





1.9 Collaborate with stakeholders

Evaluate engagement needs for stakeholders (1.9.1)

2.4 Engage stakeholders

Analyze stakeholders (power interest grid, influence, impact) (2.4.1)

Categorize stakeholders (2.4.2)

Develop, execute and validate a strategy for stakeholder engagement (2.4.4)

2.2 Manage communications

Analyze communication needs of all stakeholders (2.2.1)

Determine communication methods, channels, frequency and level of detail for all stakeholders (2.2.2)

















Tutor



Helmut Schneider, PMP, PMI-ACP, PSM, PSPO ist seit mehr als 20 Jahren freiberuflicher Senior Project Manager, Berater und Trainer für alle Fragen rund ums Projektmanagement.

Seit Ende 2020 ist er zusätzlich PMI-akkreditierter PMI-ATP PMP® und CAPM® Trainer. Er verfügt über die Erfahrung aus über 300 Trainings, darunter mehr als 130 PMP® Exam Prep Trainings, die er für internationale Kunden und Partner seit 2009 abgehalten hat.

Sein Focus und seine Leidenschaft liegen neben dem klassischen und hybriden Projektmanagement in der Agilität, v.a. dem agilen Mindset. Als zertifizierter Scrum Master, Product Owner und PMI-Agile Certified Practitioner verfügt er über die entsprechenden Kenntnisse und Erfahrungen. Er ist Mitglied im PMI Germany Chapter seit 2008. Helmut ist begeisterter Musiker mit Band und Mountainbiker. Er lebt mit seiner Familie in der Nähe von Augsburg"

Helmut Schneider, PMP, PMI-ACP, PSM, PSPO has been a freelance senior project manager, consultant and trainer for all project management issues for more than 20 years. Since the end of 2020, he has also been a PMI-accredited PMI-ATP PMP® and CAPM® trainer. He has experience from over 300 trainings, including more than 130 PMP® Exam Prep trainings, which he has held for international clients and partners since 2009.

In addition to classic and hybrid project management, his focus and passion lies in agility, especially the agile mindset. As a certified Scrum Master, Product Owner and PMI Agile Certified Practitioner, he has the relevant knowledge and experience. He has been a member of the PMI Germany Chapter since 2008. Helmut is an enthusiastic musician with a band and mountain biker. He lives with his family near Augsburg".