Introduction to Project Management

- Introduction
- Introduction to Project Management
- Project Initiation
- Project Planning
- Project Execution
- Project Closeout
Course Scope

This introduction course -

• Teaches the fundamentals, tools, and concepts of project management
• Discusses the role of the project manager as well as the team member in managing a project
• Practices the fundamentals of project management

It does not –

• Teach everything there is to know about project management
• Cover all topics of project management in great depth
Course Objectives

*By the end of this course, you should be able to -*

- Describe roles and responsibilities of project managers across the project life cycle
- Define and develop the foundations of a project plan, including the project requirements documents, work breakdown structure, cost, schedule, and other resources
- Manage and control the project against the baseline
- Close out a project
Introduction to Project Management

- Introduction
- Introduction to Project Management
- Project Initiation
- Project Planning
- Project Execution
- Project Closeout
Objectives

• Define a project and a project life cycle
• Explain project management and its importance
• Explain the triple constraint that affects every project
• Identify influence on a project
• Describe project processes that make up every project
• Explain the roles, responsibilities, and key competencies of project managers
What is a Project?

• A temporary endeavor to create a unique product, service, or result with a defined start and end point and specific objectives that, when attained, signify completion.

  » PMBOK® Guide, p. 3
Project Management

• The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements
• Accomplished through the application and integration of the project management process of initiating, planning, executing, monitoring and controlling, and closing.

» PMBOK® Guide, p. 5

Sound project management helps ensure success.
The Triple Constraint
Managing Projects Using the Triple Constraint

• Balancing the three “sides” to complete the project
• Combining art and science
• Defining and refining the project on an ongoing basis
Identifying Key Stakeholders

Who are the stakeholders? Consider:

- Who gets the output from the project?
- Who provides the input?
- Who has oversight?
- Who has other related responsibilities?
- Who reaps the rewards?
- Who suffers the penalties?
Influences on a Project

• Key stakeholders
  – Sponsor: The person or group that provides the financial resources, in cash or in kind, for the project…
    » PMBOK® Guide, p. 32
  – Customers and users, Sellers, Business partners, Organizational groups, Functional managers
  – Other stakeholders: Anyone else with the influence on the project

• The organization’s systems, structures, and culture
• External social, environmental, and economic factors
Project Management Process Groups

PMBOK® Guide’s five project process groups: initiating, planning, executing, monitoring and controlling, and closing

» PMBOK® Guide, p. 60-61
Project Management Knowledge Areas

Knowledge Areas provide a detailed description of the process inputs and outputs along

- Project Knowledge areas:
  - Integration
  - Scope
  - Time
  - Cost
  - Quality
  - Human Resources
  - Communications
  - Risk
  - Procurement
  - Stakeholder

➢ PMBOK® Guide, pp. 60-61
### Table A1-1. Project Management Process Group and Knowledge Area Mapping

<table>
<thead>
<tr>
<th>Knowledge Areas</th>
<th>Project Management Process Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Initiating Process Group</td>
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<tr>
<td></td>
<td>Planning Process Group</td>
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<tr>
<td></td>
<td>Executing Process Group</td>
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<td></td>
<td>Monitoring and Controlling Process Group</td>
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<td>Closing Process Group</td>
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<tr>
<td>4. Project Integration Management</td>
<td>4.1 Develop Project Charter</td>
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<td></td>
<td>4.2 Develop Project Management Plan</td>
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<td></td>
<td>4.3 Direct and Manage Project Work</td>
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<td></td>
<td>4.4 Monitor and Control Project Work</td>
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<td></td>
<td>4.6 Close Project or Phase</td>
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<tr>
<td>5. Project Scope Management</td>
<td>5.1 Plan Scope Management</td>
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<td></td>
<td>5.2 Collect Requirements</td>
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<td></td>
<td>5.3 Define Scope</td>
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<td></td>
<td>5.4 Create WBS</td>
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<td></td>
<td>5.5 Validate Scope</td>
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<td></td>
<td>5.6 Control Scope</td>
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<tr>
<td>6. Project Time Management</td>
<td>6.1 Plan Schedule Management</td>
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<tr>
<td></td>
<td>6.2 Define Activities</td>
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<td></td>
<td>6.3 Sequence Activities</td>
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<td></td>
<td>6.4 Estimate Activity Resources</td>
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<td></td>
<td>6.5 Estimate Activity Duration</td>
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<td></td>
<td>6.6 Develop Schedule</td>
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<td></td>
<td>6.7 Control Schedule</td>
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<td></td>
<td>7.2 Estimate Costs</td>
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<td></td>
<td>7.3 Determine Budget</td>
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<tr>
<td></td>
<td>7.4 Control Costs</td>
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<td></td>
<td>8.2 Perform Quality Assurance</td>
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<td></td>
<td>9.2 Acquire Project Team</td>
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<tr>
<td></td>
<td>9.3 Develop Project Team</td>
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<td></td>
<td>9.4 Manage Project Team</td>
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<td>10. Project Communications Management</td>
<td>10.1 Plan Communications Management</td>
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<td>10.2 Manage Communications</td>
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<td></td>
<td>10.3 Control Communications</td>
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<td></td>
<td>11.2 Identify Risks</td>
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<td></td>
<td>11.3 Perform Qualitative Risk Analysis</td>
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<td></td>
<td>11.4 Perform Quantitative Risk Analysis</td>
</tr>
<tr>
<td></td>
<td>11.5 Plan Risk Responses</td>
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<tr>
<td></td>
<td>11.6 Control Risks</td>
</tr>
<tr>
<td>12. Project Procurement Management</td>
<td>12.1 Plan Procurement Management</td>
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<tr>
<td></td>
<td>12.2 Conduct Procurements</td>
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<td></td>
<td>12.3 Control Procurements</td>
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<td>13. Project Stakeholder Management</td>
<td>13.1 Identify Stakeholders</td>
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<td></td>
<td>13.2 Plan Stakeholder Management</td>
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<td></td>
<td>13.3 Manage Stakeholder Engagement</td>
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<td></td>
<td>13.4 Control Stakeholder Engagement</td>
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</table>


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<table>
<thead>
<tr>
<th>Initiating</th>
<th>Planning</th>
<th>Executing</th>
<th>Monitoring &amp; Controlling</th>
<th>Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select project manager</td>
<td>Determine how you will do planning—part of management plans</td>
<td>Acquire final team</td>
<td>Measure against the performance measurement baselines</td>
<td>Develop closure procedures</td>
</tr>
<tr>
<td>Determine company culture and existing systems</td>
<td>Create project scope statement</td>
<td>Execute the PM plan</td>
<td>Complete contract closure</td>
<td>Complete contract closure</td>
</tr>
<tr>
<td>Collect processes, procedures and historical information</td>
<td>Determine team</td>
<td>Recommend changes and corrective actions</td>
<td>Confirm work is done to requirements</td>
<td>Gain formal acceptance of the product</td>
</tr>
<tr>
<td>Divide large projects into phases</td>
<td>Create WBS and WBS dictionary</td>
<td>Send and receive information</td>
<td>Determine variances and if they warrant corrective action or a change</td>
<td>Final performance reporting</td>
</tr>
<tr>
<td>Identify stakeholders</td>
<td>Create activity list</td>
<td>Implement approved changes, defect repair, preventive and corrective actions</td>
<td>Scope verification</td>
<td>Index and archive records</td>
</tr>
<tr>
<td>Document business need</td>
<td>Create network diagram</td>
<td>Continuous improvement</td>
<td>Configuration management</td>
<td>Update lessons learned knowledge base</td>
</tr>
<tr>
<td>Determine project objectives</td>
<td>Estimate resource requirements</td>
<td>Follow processes</td>
<td>Recommend changes, defect repair, preventive and corrective actions</td>
<td>Hand off completed product</td>
</tr>
<tr>
<td>Document assumptions and constraints</td>
<td>Estimate time and cost</td>
<td>Team building</td>
<td>Integrated change control</td>
<td>Release resources</td>
</tr>
<tr>
<td>Develop project charter</td>
<td>Determine critical path</td>
<td>Give recognition and rewards</td>
<td>Approve changes, defect repair, preventive and corrective actions</td>
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<tr>
<td>Develop preliminary project scope statement</td>
<td>Develop schedule</td>
<td>Hold progress meetings</td>
<td>Risk audits</td>
<td></td>
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<tr>
<td></td>
<td>Develop budget</td>
<td>Use work authorization system</td>
<td>Manage reserves</td>
<td></td>
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<tr>
<td></td>
<td>Determine quality standards, processes and metrics</td>
<td>Request seller responses</td>
<td>Use issue logs</td>
<td></td>
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<tr>
<td></td>
<td>Determine roles and responsibilities</td>
<td>Select sellers</td>
<td>Facilitate conflict resolution</td>
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<td></td>
<td>Determine communications requirements</td>
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<td>Measure team member performance</td>
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<tr>
<td></td>
<td>Risk identification, qualitative and quantitative risk analysis and response planning</td>
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<td>Report on performance</td>
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<td></td>
<td>Iterations—go back</td>
<td></td>
<td>Create forecasts</td>
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<td></td>
<td>Determine what to purchase</td>
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<td>Administer contracts</td>
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<td></td>
<td>Prepare procurement documents</td>
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<td></td>
<td>Finalize the &quot;how to execute and control&quot; aspects of all management plans</td>
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<td></td>
<td>Create process improvement plan</td>
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<td></td>
<td>Develop final PM plan and performance measurement baselines</td>
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<td></td>
<td>Gain formal approval</td>
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<td></td>
<td>Hold kickoff meeting</td>
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</tbody>
</table>
Project Manager Roles and Responsibilities

• **Explicit role:** Managing the project to meet or exceed stakeholder expectations

• **Related roles:** Planning, leading, negotiating, communicating, problem solving, prioritizing…

• The project manager must get other people to do what his or her project needs, often with limited authority
Key Messages

• A project is a temporary endeavor undertaken to create a unique product, service, or result
  » PMBOK® Guide, p. 3

• Project management is—
  – The application of knowledge, skills, tools, and techniques to project activities to meet project requirements
  – Accomplished through the application and integration of the PM process of initiating, planning, executing, monitoring and controlling, and closing
    » PMBOK® Guide, p. 60-61

• The triple constraint of time, cost, and scope underlies every project
• Internal and external factors influence every project
• The phases of a project (which often vary by type of project) make up the project’s life cycle
• Five interacting processes make up a project: initiating, planning, executing, monitoring and controlling, and closing
• The project manager’s primary role is to manage the project, but also important are the related roles of planning, leading, communicating, negotiating, and problem solving
Introduction to Project Management
Objectives

By the end of this section, you should be able to -

• Identify the role of senior management in project initiation and in the success of your project
• Develop good project objectives based on assessing needs
• Distinguish between functional and technical requirements and understand the role of both
• Describe quantitative and qualitative methods that senior management may use to select projects
• Develop a project charter
• Develop a project requirements document
Keys to Project Success

Project success is based on-

• Good requirements
• Good planning
• Good monitoring and controlling
• Good closing
The Right Start

Wants/Needs

Objectives

Functional Requirements

Technical Requirements
Work Breakdown Structure (WBS)

The WBS-

• [l]s a deliverable-oriented hierarchical decomposition of work to be executed by the project team, to accomplish the project objectives and create the required deliverables
• [O]rganizes and defines the total scope of the project
• [S]ubdivides the project work into smaller, more manageable pieces of work, with each descending level of the WBS representing and increasingly detailed definition of project work

-PMBOK® Guide, p. 126
Formulating Good Objectives

Objective

- An understanding between someone who needs something and someone who can provide it
- Exists at all levels (corporate, project, work team, specific)
- Uses the SMART model
  - S = Specific
  - M = Measurable
  - A = Agreed-upon
  - R = Realistic
  - T = Time-constrained
## Requirements: Functional and Technical

**Functional: The What’s**
- Nontechnical
- Understandable
- Performance specifications
- Features and capabilities
- Customer-oriented

**Technical: The How’s**
- Detailed Components
- Particular
- Design specifications
- Project team-oriented

### Key problems-
- Customer giving technical requirements
- Team members wanting to rewrite the customer’s functional requirements

### Tool: Basic Requirements Checklist
Project Charter

- Reference for authority for the future of the project
- Written agreement between the senior management, project manager, and the functional manager
- Preliminary delineation of roles and responsibilities

**Tool: Project Charter**
Project Charter Fundamentals

- Set boundaries
- Be as concise as possible
- Identify name and titles for responsibility
- Map out the flow of documentation and information in advance
- Establish expectations for change control, budget, and status reports
Project Requirements Document (PRD)

- Documents the project objectives and requirements
- Documents the business case
- The project team drafts the PRD and senior management/stakeholders approve it
- Used to build consensus among key stakeholders

Tool: Project Requirements Documents
Key Messages

• Senior management usually selects and initiates a project
• Projects originate for many reasons, from product obsolescence to client requirements to individual innovation
• Needs must be assessed, objectives set, and functional and technical requirements defined
• Customers define functional requirements
• The project team develops the technical requirements
Key Messages (continued)

• Quantitative methods and qualitative considerations enter into project selection
• A project charter spells out the roles and responsibilities of the project manager, key members of the project team, and input from other organizational agencies
• A project requirements document defines the work to be done
• A good projection definition is required before detail planning can begin
Introduction to Project Management

Diagram:
- Introduction
- Introduction to Project Management
- Project Initiation
- Project Planning
- Project Execution
- Project Closeout

Flow:
- Introduction → Introduction to Project Management → Project Initiation → Project Planning
- Project Planning → Project Execution
- Project Execution → Project Closeout
Objectives

• Identify and observe how the project manager works with his or her project team to plan a project
• Plan for the scope of a project through a work breakdown structure (WBS)
• Plan the schedule
• Plan the costs
• Plan other resources
• Plan for risk
• Plan for procurement needs
• Plan for communication and quality
• Produce a project plan
Keys to Project Success

*Project success is based on-*

• Good requirements
• Good planning
• Good monitoring and controlling
• Good closing
Core Project Team

• Core group of key people
  – NOT the whole team
  – NOT senior management
  – INCLUDES the project management team

• Self-directed and interactive

• Project management tip: Get the right people on the core team
Scope Planning

- **Scope:** *The sum of the products, services, and results to be provided as a project*
- **Scope planning:** *The process [to create] a project scope management plan*
- Scope was outlined in the project initiation phase and documented in the PRD; now it is time to focus on project details

*Source: PMBOK® Guide, p.562*
Key WBS Terms

• Control account
  – Typically a level above the work package
  – Level for management reporting

• Planning package
  – Undefined work package
  – Known work, no detail

• Work package
  – Lowest level of the WBS
  – Level where work is assigned and monitored
  – Basic level for addressing schedules, costing, and resources needed
1.0 Energy Management System

1.1 Needs Assessment
- 1.1.1 Measure state of current system
  - 1.1.1.1 Identify components of current system
  - 1.1.1.2 Analyze components of current system
- 1.1.2 Determine future capability requirements
  - 1.1.2.1 Perform gap assessment
  - 1.1.2.2 Identify required changes
- 1.1.3 Develop alternative approaches
  - 1.1.3.1 Identify alternative approaches
  - 1.1.3.2 Analyze alternative approaches
- 1.1.4 Develop system requirements
  - 1.1.4.1 Conduct system requirements assessment
  - 1.1.4.2 Review new system requirements list

1.2 Specification Development

1.3 Systems Engineering

1.4 Project Management
Case Study 3-1

Creating the Project’s WBS
Estimating

*Forecasting the cost, schedule, and resource requirement needed to produce a specific deliverable.*

Work packages provide the basis for the project manager’s estimates of-

- How long?
- How much money?
- How many people and other resources?
Good Estimating Practices (cont.)

Three-Point Estimate

\[ O + ML + P \]

\[ Et = \frac{O + ML + P}{3} \]

PERT Estimate

\[ O + 4ML + P \]

\[ Et = \frac{O + 4ML + P}{6} \]

\[ P - O \]

\[ SD = \frac{P - O}{6} \] (confidence in estimate)

Where:

*Et* = Estimated time

*O* = Optimistic estimate

*ML* = Most likely estimate

*P* = Pessimistic estimate

*SD* = Standard deviation
Network Diagramming

- Shows the chronological relationship between scheduled activities
- Activities are represented by boxes
- Dependencies are represented by arrows
- Multiple arrows (dependencies) are possible
Transforming a WBS into a Network Diagram

Work packages break down into activities and activities build the schedule.

**Work Package: Install new building fire alarm system**

<table>
<thead>
<tr>
<th>Activities</th>
<th>Duration</th>
<th>Predecessors</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Determine system requirement</td>
<td>10</td>
<td>Boss go-ahead</td>
</tr>
<tr>
<td>b. Design system layout</td>
<td>15</td>
<td>a</td>
</tr>
<tr>
<td>c. Obtain New water line</td>
<td>20</td>
<td>a</td>
</tr>
<tr>
<td>d. Obtain permits</td>
<td>32</td>
<td>b</td>
</tr>
<tr>
<td>e. Order/receive parts</td>
<td>35</td>
<td>b</td>
</tr>
<tr>
<td>f. Install new system</td>
<td>5</td>
<td>d, e</td>
</tr>
<tr>
<td>g. Test new system</td>
<td>2</td>
<td>c, f</td>
</tr>
<tr>
<td>h. Deactivate old system</td>
<td>1</td>
<td>g</td>
</tr>
</tbody>
</table>
Network Diagramming
Resource Planning

• Plan for the resources you need to do the project
  – People
  – Equipment
  – Facilities

• Human Resource Planning
  – Staff planning
  – Staff acquisition
  – Maintaining the staff
  – Replenishing the staff

• Resource Planning Tools
  – Roles and responsibilities matrixes
  – Resource loading table
  – Resource Gantt chart
  – Resource loading histograms
  – Resource leveling
Risk Management Planning

The process of deciding how to approach, plan, and execute risk management activities for a project

*Source PMBOK® Guide, p. 309

- Risks are Threats AND Opportunities
- Risk planning is an integral part of project planning
- Risk management consists of six processes:
  - Risk management planning
  - Risk identification
  - Qualitative risk analysis
  - Quantitative risk analysis
  - Risk response planning
  - Risk monitoring and control

*Source PMBOK® Guide, p. 312
Risk (cont.)

- A definable **event**
  - **Timing:** Short- or long-term potential of risk occurring
  - **Frequency:** How often the event might occur
- **Probability** of occurrence
- **Impact** (consequence) of occurrence
- Based on the assessment of probability and impact, you should prioritize the risk when-
  - You do not have the resources to prepare for everything
  - Some potential events are too low priority to be worth the effort
Risk Response Strategies for Threats

- **Accept**- preparing for and dealing with a risk’s consequences, either actively or passively
- **Mitigate**- reducing the probability and/or consequences of threat to an acceptable threshold
- **Transfer**- shifting a threat’s consequence to a third party
- **Avoid**- eliminating the threat, usually by eliminating its potential cause
Risk Response Strategies for Opportunities

- **Accept** - same as threat response strategy
- **Enhance** - modify the potential of an opportunity by increasing probability and/or positive impacts, and by identifying and maximizing key drivers
- **Exploit** - ensure that the opportunity is realized; eliminate the uncertainty associated with a particular upside risk by making the opportunity definitely happen
- **Share** - allocate ownership to a third party who is best able to capture the opportunity
Risk Management Plan

For each risk event, document
• WBS
• Event description
• Probability
• Impact
• Response strategy
• Follow-up date
• Point of contact for responsibility

This is similar to the risk register

Tool: Risk Management Plan
Reserve Planning

A *set-aside of resources to deal with risk events as provided for in the project management plan*

- Reserve has multiple components
  - Cash
  - Time
  - People and equipment

- Reserve planning-
  - Deals with unexpected events within the original scope
  - Does not deal with changes or additions to your plan
Project Procurement Management

• The processes necessary to purchase or acquire products, services or results needed from outside the project team.

*Source PMBOK® Guide, p. 355

• Project Procurement Management Overview
  – Plan Procurement
  – Conduct Procurements
  – Control Procurements
  – Close Procurements

*Source PMBOK® Guide, p. 356
Procurement Planning

For every input, there is an output, that is created by using a tool and/or technique

• Inputs, Tool & Techniques, Outputs
  – Planning – pg. 358
  – Conducting – pg. 371
  – Controlling – pg. 379
  – Closing – pg. 386

Source: PMBOK® Guide
Procurement Consideration

- What types of contracts will be used?
- What are the evaluation criteria to select outside contracts?
- What responsibilities does the project manager have in procurement and solicitation?
- Are standardized procurement documents used? If so, what are they?
- How will multiple providers be managed?
- How will procurement be coordinated with the rest of the project?
Communication Management

Communication in Project Management is all about plan, manage, and control

– Who needs to know what?
– How will you tell them?
– When and how often?
– What needs to be part of a permanent record and how?
Communication Management

For every input, there is an output, that is created by using a tool and/or technique

- Inputs, Tool & Techniques, Outputs
  - Plan – pg. 289
  - Manage – pg. 297
  - Control – pg. 303

Source: PMBOK® Guide
Quality Planning

The primary objective of quality planning is to determine which standards apply and which metrics to use to measure compliance.

- The project manager and the team must:
  - Clarify quality policy direction
    - Link to customer’s policy
    - Link to the organization’s strategy
  - Determine project standards and metrics for tasks within standards

Tool: Quality Plan
Elements of a Project Plan

- Management summary
- Deliverables
- Project requirements
- Resources
- Potential project risks/issues
- Schedule

- Reporting
- Regulations and standards
- Evaluations
- Supporting plans
- Supporting documentation
Case Study 3-3

Planning for Success: Building the Project Plan
Key Messages

• The core project team is involved in project planning
• Understanding the scope is key to project planning
• A work breakdown structure (WBS) is a deliverable-oriented method to break down the scope in order to plan for its completion
• Although a WBS has different formats, levels of detail, and ways of being created, the work package is always the bottommost level
Key Messages (continued)

- A WBS dictionary provides important working-level information about each work package.
- Schedule planning involves determining the timing of the project, including critical path, lag, lead, and float, and may be presented in many formats.
- Cost planning involves determining the direct costs that the work packages required, as well as indirect cost (overhead) allocated to the project.
- Resource planning covers people, materials, facilities, and other resources.
Key Messages (continued)

• Risks (both opportunities and threats) must be identified, analyzed, prioritized, and planned for through the appropriate response strategy
• Procurement planning involves deciding whether to procure outside services and how to choose which outside services and how to choose which outside entity to use
• Communication and quality round out the project manager’s planning processes
• All these processes come together in the project plan
Introduction to Project Management

- Introduction
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- Project Initiation
- Project Planning
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- Project Closeout
Objectives

- Determine and interpret project baselines
- Assess project performance
- Respond to requested changes in a project
- Apply earned value management to determine project performance
- Respond to risks as they occur
- Complete and present a performance report
- Align project team performance with stakeholder expectation
Keys to Project Success

*Project success is based on-*

- Good requirements
- Good planning
- Good monitoring and controlling
- Good closing
Project Baselines

• The original plan, plus approve changes
• Note:
• Baselines (plural)
  – Scope
  – Cost
  – Time
Who Needs Baselines?

- Customer
- Project manager
- Management
- Accounting
- Project team
Earned Value Terminology

- **Planned value** (PV) & (BCWS)- Budgeted cost of the work that was scheduled to be done as of today
- **Actual cost** (AC) & (ACWP)- Total amount spent as of today
- **Earned value** (EV) & (BCWP)- Budgeted cost for the work actually performed as of today (for partially completed work packages, EV - percent complete x total budgeted cost of work package)
- **Budget at completion** (BAC)- Sum of approved budget for all work packages
Interpreting Earned Value Calculations

- Positive values for CV and SV indicate cost under budget; ahead of schedule
- Negative values for CV and SV indicate cost over budget and behind schedule
- Ratios greater than 1 for CPI and SPI indicate under budget and ahead of schedule
- CPI and SPI ratios less than 1 indicate cost over budget and behind schedule
Assessing Project Status

- Time
- Cost
- Scope
- Resources
- Quality
- Customer perspective
Project Evaluation

• Periodic project evaluations
  – Encourage timely adjustment
  – Facilitate midcourse corrections instead of waiting until the end
  – Help with stake holder communication

• Outcomes of evaluation
  – Continue as planned
  – Minor redirection
  – Major redirection
  – Early termination
Managing Risk

• Be proactive
• Monitor earlier assumptions
• Watch for “triggers”
• Implement responses, as needed, from your risk management plan
• Document what you do in the risk management plan and other project documents
Change Control System

• Change happens for many reasons and in many forms:
  – Customer input
  – Team input
  – Business input

• An organized, systematic approach is helpful in managing change:
  – Change request forms
  – Review and evaluation process
  – Decisions
Possible Project Team Structures

• *Specialty*-team members possess skills that can be used on multiple parts of the project; project manager serves primarily as “coordinator”

• *Directive*- one clear boss who directs activities of other team members; project manager serves as “administrator”

• *Self-managed*- leadership flows to members based on expertise; project manager serves as “facilitator”
Stakeholder Expectations

- Must be managed…or they tend to wander
- Are the basis of customer satisfaction
- Should be monitored throughout implementation
- Should be a major project management concern
Key Messages

• Stakeholders measure how the project is doing against time, cost, and other baselines
• Monitoring and controlling is ongoing and used by the team; evaluation is periodic and used by senior management
• Change can be managed with well-designed change management system
• Earned value shows the project manager the difference between what was planned and what has occurred at a certain point in time
Key Messages (continued)

• Reserves and risk response plans can be used to manage risks
• Performance reports should be prepared differently for different audiences
• The project manager must develop, structure, and support the project team for it to perform well
• Conflict is inevitable and must be managed
• The project manager must balance team performance with stakeholder expectations
Introduction to Project Management

- Introduction
- Introduction to Project Management
- Project Initiation
- Project Planning
- Project Closeout
- Project Execution
Objectives

• Identify key tasks required for proper scope verification and customer closure
• Identify key tasks for proper administrative and contract closure
• Complete and interpret a set of lessons learned for the project
• Communicate lessons learned and project successes with project stakeholders and others
Keys to Project Success

• Good requirements
• Good planning
• Good monitoring and controlling
• Good closing
Proper Closeout

• Planned for in the WBS with resources allocated to it

• Needed for all project, even those that end prematurely or are otherwise incomplete

Tool: Closeout Procedure
Scope Verification and Customer Acceptance

Scope verification is the process of obtaining the stakeholders’ formal acceptance of the completed project scope and associated deliverables

Source PMBOK® Guide, pg. 118 - 119

• This means:
  – Did you do what you said you were going to do?
  – Have the scope activities and deliverables been completed

• Two steps:
  – Sit down with your team and check the WBS
  – Sit down with the customer

Tool: Customer Acceptance Worksheet
Administrative and Contract closure

• Close out the books
• Set up project archives or files
• Handle equipment, facilities, and so on

*Tool: Documentation Plan*
Lessons Learned

- Timely
- Relevant
- In context
- Detailed
- Filed and accessible

**Tool:** Lessons Learned Document

**Tool:** Final Project Report
Other Closeout Activities

• Personal closeout
• Team closeout
• Public relations
• Celebrate, as appropriate
Key Messages

• Plan closeout in the WBS
• Verify scope against agreed-upon requirements
• Closing out with the customer involves both technical acceptance and sign-off
• Administrative and contract closeout ensures all project requirements are met
• Lessons learned impart valuable knowledge to your organization for use in future work
• Close out with the team, stakeholders, and yourself, including appropriate recognition and celebration of your efforts
Nest Steps: Action Plan

• Does your organization typically plan closeout into projects?
• Why is it important to plan for closeout?
• How can you improve your scope verification and customer acceptance?
• How well does your organization document and share lessons learned?
• Is it effective?
• What can you do to strengthen or enhance it?
Network Diagramming